

Case Study: OUT OF THE BOX Consulting

DEBORAH KIM • October 16th, 2013



About OUT OF THE BOX Consulting

[OUT OF THE BOX Consulting](#) (OOTB-C) is a Salesforce consulting company founded in 2004. OOTB-C implements new Salesforce instances, reconfigures existing instances, and offers full customization and development on the Salesforce platform. OOTB-C builds both point-and-click and complex solutions to help clients and businesses get what they really need.

The Requirements

OUT OF THE BOX Consulting had a client that needed a web form. The client — a company that sells embedded systems mainly through channel resellers — required the collected data to be created and manipulated in Salesforce.

“We were planning to create it on our own,” said **Reuven Shelef, Founder and President**.

Then the client made an additional request: they wanted their marketing team to be able to create similar forms for different processes. But this would not be possible if OOTB-C developed the web form from scratch.

OUT OF THE BOX Consulting realized they needed an app that could create web forms and connect to Salesforce — an app that was also low cost, flexible, and easy to use, so that the forms could be maintained by people without any coding skills. When OOTB-C evaluated their options on the Salesforce AppExchange, they chose FormAssembly.

“After I played around with FormAssembly and got to see what it does, I realized the whole idea of creating web forms from scratch — there was no reason to even think of that approach anymore,” said Reuven.

Use-Case: Sales Incentive Claim Form

The client needed a sales incentive claim form for their sales incentive program. For example, a reseller could bring in a lead, register the deal, and then in order to receive incentives such as an Amazon gift card or an iPad, submit an incentive claim form. However, the company needed to make sure that the deals and claims fulfilled the terms & conditions, which were dependent on a number of progression and logistical parameters — e.g., *when* the registration was submitted, or *when* the sales process occurred. If the reseller met the criteria, they would be notified of their reward, and receive their prize.

OUT OF THE BOX Consulting created the automated process in Salesforce, according to all the captured parameters and the incentive claims submitted through FormAssembly. The claims were approved or rejected, and the notifications were sent out — automatically.

The client can run several different programs concurrently, in the U.S. and around the world. With each program, the company needed similar forms, with select differences, such as varied prizes and different dates. With FormAssembly, OOTB-C cloned the forms as needed, and used hidden fields to connect the forms to specific sales incentive programs.

Every FormAssembly submission connected to two different custom objects, and FormAssembly helped OOTB-C overcome limitations in Salesforce, Reuven said. A placeholder for an unknown opportunity was created and linked via FormAssembly, since Salesforce does not allow you to create a custom record connected to an opportunity that doesn't exist yet.

Extremely Delighted

Before OUT OF THE BOX Consulting implemented this project, the client had an employee who spent a significant part of her time performing manual data re-entry and evaluating the incentive claims. She received web form responses through external databases such as email or Excel, which could not go directly into Salesforce.

The client's marketing team was familiar with creating web forms and submitting the responses into Salesforce as leads, but the incentive claims weren't leads, and the client's Salesforce department did not want leads entered into the database that weren't actually leads.

Reuven said the marketing team was stuck with a bunch of submissions which they had to manually correlate to leads and opportunities, and a bunch of information in order to measure each claim against the ten or so different criteria. "It was a manual work nightmare — and we eliminated it."

And, since OUT OF THE BOX Consulting designed the FormAssembly forms to match the client's previous web forms, after the project was launched, the client's resellers couldn't even notice anything had changed. The effect was seamless.

On the marketing side, the sales incentive manager now receives all the data in Salesforce a split second after the form is submitted. The manager can approve or reject the claim — the only manual intervention that's now desired, for financial control, since everything else happens automatically.

So, how does the client feel about the project?

"Extremely delighted," said Reuven. "The ROI is extraordinary."

Forward with FormAssembly

Reuven said it's been a pleasant surprise to see how much customization is possible with FormAssembly. When the client wanted a different font for the fields, it was easy for OUT OF THE BOX Consulting to change

the configuration.

And OOTB-C looks forward to exploring what else FormAssembly can do. “I feel that FormAssembly is a much more robust application than what we’re using it for now — we’re just scraping the tip of the iceberg,” said Reuven.

If you have a project or need Salesforce expertise, [contact OUT OF THE BOX Consulting](#).

8+1

This entry was posted on Wednesday, October 16th, 2013 at 10:00 am and is filed under [Business](#), [Case Study](#), [Salesforce Integration](#). You can follow any responses to this entry through the [RSS 2.0](#) feed. You can [leave a response](#), or [trackback](#) from your own site.
