



## A Case Study

# Leveraging the power of Salesforce for Payment Services



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### Gauri delivered:

- Salesforce Health Check
- Improved Onboarding Process
- Improved First-Call Resolution
- Improved User Adoption
- Best Practice Adherence



## About QubePay

QubePay is a young and dynamic UK payment services company providing innovative payment solutions tailored to organisations operating in industries such as Retail, Forex, Gambling, and Gaming.

Having recently acquired and implemented Salesforce in-house, QubePay felt its system requirements were not being addressed so decided to bring in a Salesforce Partner to help them reconfigure and optimise its Salesforce implementation.

Having spoken with a number of partners, QubePay selected Gauri for our “industry knowledge and positive approach”.



Having spent 20 years working in global pharma, a project such as this would have taken at least 6 months, however, Gauri helped us deliver our project in less than a month from start to finish.

**Soneya Kahn**, CEO, QubePay

## The Assignment

QubePay’s Sales Cloud implementation had evolved to a point where it had deviated too far from standard salesforce processes and best practices.

This was causing significant administrative overheads and poor user adoption of Salesforce.

An effective Agile development methodology was employed to deliver a comprehensive solution in under 4 weeks, including data migration and testing together with full technical/solution documentation provided post-go-live.

## Key Improvements Achieved

- **Sales Process Optimization** and improvements around lead management including:
  - Redesigning and broadening the scope of Lead Management to simplify process flows for more rapid onboarding of Merchants, Partners and Acquirers through Salesforce.
  - Reduced Merchant onboarding time by collecting only the essential data required for submission to Acquirers for approval.
- **Implemented and Optimized Opportunity Management** so multiple teams could work on the same opportunity in parallel to further speed up the onboarding process.
  - Automated processes so Merchants could be referred to multiple Acquirers simultaneously to drive more deals faster.
  - Built a customised help function that staff could refer to at any stage of the process to help speed things up.
- **Implemented Case Management** so the installation team are notified as soon as a deal is concluded and can get Merchants up and running without delay.
  - Designed and implemented processes to efficiently manage and resolve all Merchant and Partner support requirements.

## Additionally...

- Designed and built 15 reports including one providing statistics on the number of days a merchant application took at every stage of the onboarding process, helping management identify ways to accelerate the process.
- Undertook a complex data migration process to accurately map and transfer existing data to the new system.
- Made significant improvements in Salesforce codebase for better adherence to best practices, reduction in technical debt and improved systems scalability.



## The Result

Salesforce user adoption has increased significantly within QubePay. This resulted in an immediate increase in sales and customer satisfaction due to significant reductions in onboarding times and faster more efficient fault resolution.

If you are interested in learning more about Gauri's Salesforce solutions for the payment and financial services sector and how they can benefit your business, please get in contact with us.

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## About Gauri

Gauri is a Salesforce Crest Partner providing the full portfolio of services including implementation, solution enhancements and managed service support.

We were formed in 2007 with a commitment to provide our clients with unrivalled value and commercial integrity in delivering Salesforce and SAP solutions and associated support.

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