Quest Streamlines Pre-Sales Activity With Salesforce Field Service Lightning and Prodly

Quest®

Change Management Brings Clarity to a Complex Org

Quest provides software solutions for the fast paced world of enterprise IT to 130,000 companies across 100 countries. When their sales team had outgrown their legacy calendar booking system, Quest turned to Salesforce Field Service Lightning for its advanced scheduling and territory management capabilities. With more than 1,000 sales users and thousands of future demos, proof of concept, and RFPs appointment s already scheduled, Quest also needed to implement a standard release management process to ensure the implementation went smoothly.

To start, Quest implemented change set development, configuring FSL in a developer sandbox before using change sets to move releases to a full sandbox for testing and then into production. Faced with the challenge of moving highly relational configuration data not supported in change sets, Quest turned to a tool the team was already using for other Salesforce projects—Prodly AppOps Release.

"I was completely new to Salesforce FSL, and Prodly really helped me get up to speed faster. Prodly's pre-built FSL templates made all of the data schema decisions for me. I didn't need to worry about maintaining the different object relationships; Prodly automatically sequences the data deployment in the correct order for me," explains Zach Hower, Salesforce System Administrator at Quest.

Moving Field Service Lightning Releases From Sandbox to Production

For many implementations, the highly relational data schema of Field Service Lightning makes it too complicated and time consuming to configure following release management best practices. Many customers opt to build configuration changes directly in production, rather than have to manually move and rebuild Field Service Lightning in every lower level Salesforce org. Since Prodly automates the migration of highly relational, configuration data between Salesforce orgs, this was not a problem for Quest.

Benefits at a Glance

- ✓ Faster release cycles with automated data deployment

- ✓ Eliminated need to build/change FSL directly in production

- ✓ Significant time savings achieved by eliminating manual, repetitive tasks

- ✓ Expanded standard release process across Salesforce including CPQ, B2B Commerce, and Community

"Prodly AppOps gives us hours back every release cycle so we can start working on the next project in our backlog sooner. Thanks to Prodly, we're focused on meaningful projects that will deliver value to the business instead of the manual, administrative work of managing a release."

— Zach Hower, Salesforce System Administrator at Quest

With Prodly's pre-built FSL templates, the team was able to immediately automate configuration data deployments as releases moved through testing and user acceptance orgs into production. In addition to managing standard FSL records, Quest used AppOps Release to simplify the migration of several thousand records from the legacy calendar system into Salesforce. Quest also relied on Prodly to extend the app with custom objects to handle pre-sales scheduling.

"Prodly's data schema feature visualizes the object relationships no matter how layered or complex. It helped me understand how the data schema worked and gave me the confidence to modify the data set to our specific needs. It was easy to remove objects we weren't ready to use yet and add custom objects we needed to support the sales process." says Hower.

Quest Enables Rapid Customization While Reducing Errors

Part of Quest's customization was self-service scheduling so reps can book an available product subject matter expert (SME) whenever they need assistance on a demo or proof of concept. Each of Quest's product SMEs are assigned as Service Resources to the territories they serve either in person or remotely. Since a product SME can only be in one appointment at a time, duplication management is imperative.

"Duplication was a big concern for us, because duplicates introduce issues with double booking product SMEs, and that's not a good sales experience for our customers. Thankfully, Prodly has robust duplicate prevention that allows us to maintain individual records from org to org despite the IDs changing," says Hower.

AppOps Release has become an essential part of Quest's release process, providing significant time savings from data automation and reduced errors. If the team makes a mistake, AppOps shows exactly where in the data set the problem is so they can fix it. Quest has also expanded usage beyond Field Service Lightning, using the tool to accelerate changes for Salesforce CPQ, B2B Commerce, Community, and other projects.

"Prodly turns the time consuming, complex parts of data management into to easy-to-click buttons that do it for you. For example, even though I'm not incredibly familiar with Salesforce CPQ, I've been able to quickly make CPQ changes with Prodly," states Hower. "Troubleshooting has also become much easier. If I forget a component or don't correctly generate something in my dev org, it's simply a matter of rerunning the deployment once I've corrected the issue."

Expanding Agile Release Management to Low-Code Administrators

With Prodly as the standard for its release management process, Quest is now looking to incorporate all Salesforce changes into the process. Previously the Ops Admin team would make changes directly in production causing work to be overwritten when a new release was deployed or vice versa. AppOps Release's ease of use means Quest will be able to train it's Ops Admin team to follow the standard change management process, as well as hand off deployments to point-and-click admins so developers can focus on more specialized projects.

"Now that I have a handle on deployment templates, I can train the Ops Admin team to take over CPQ deployments and some of our hot fix deployments, which will help remove bottlenecks and make our whole team more efficient." says Hower.