



## Identifying Data Needs

RadixBay's business analysts worked with client personnel to identify the information that would best capture the customer persona and provide insights into the existing relationship.

The client's project team identified current sources of customer data and RadixBay's business analysts performed a traditional gap analysis to identify missing information.

## Data Collection and Creation

An important part of the data collection and creation strategy was to ensure that the client information could be easily kept up-to-date. The goal was to ensure that the customer information was both timely and accurate.

RadixBay's Salesforce developers created the data collection mechanisms using Salesforce's Lightning interface.

## Leveraging a Third-Party Tool to Reduce Development Time and Costs

One of the benefits of the Salesforce platform is the wide variety of third-party applications available. RadixBay's Salesforce team understood that presenting the data to the client's end users could be more quickly and cost-effectively accomplished by leveraging a third-party tool from Salesforce's AppExchange.

RadixBay performed a traditional third-party product analysis by working with the client to develop a list of evaluation criteria, identifying a list of viable competitors and executing a detailed vendor comparison.

## Conga Composer Document Automation

The evaluation team selected Conga Composer as the customer data presentation tool.

Conga's document automation application for Salesforce would provide client personnel with the ability to quickly

## About RadixBay

From application development and packaged application support to around-the-clock cloud and on-premise data infrastructure monitoring and administration, RadixBay provides a wide range of enterprise-grade IT solutions.

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