

# Helped a *leading health benefits company* quickly realize a positive return on their salesforce and Vlocity investments



## Customer Profile

The client is a leading health benefits company that offers a wide range of cloud-based products in their catalog. By combining the Salesforce with the Vlocity Health platform, they were able to build functionality that improved their core operations and offered an enhanced customer experience to their agents and clients.



## Challenge

The client was using Change Sets to deploy Salesforce metadata. They were manually exporting and importing Vlocity components to the target orgs. The Production org was the single source of truth for their latest code base. They were facing the following challenges

- > Developers were working on a single Developer Sandbox, which lead to overwritten code changes
- > Baselining and deploying Vlocity components required significant manual effort
- > Deploying metadata across Salesforce orgs meant developers had to manually select the required metadata to create a Change Set and promote it to higher orgs
- > Manual effort and multiple pre and post-deployment steps took up a significant amount of the development time



## Need

Like most of the companies that find it hard to orchestrate and manage complex Salesforce releases efficiently, the client realized the obvious benefits of having a comprehensive release management solution. They approached AutoRABIT with the following requirements

- > Version Control System to prevent overwritten code changes and track changes on Salesforce metadata and Vlocity components
- > Robust CI process to test and deploy Vlocity components from the Version Control System to target Orgs
- > Easy integration of their development toolset with ALM and Version Control System for workflow management and communication across the development team
- > Automated code coverage tests to speed business approval
- > End-to-end release management process



## Solution Offered

- > Shift from Org-driven development to Source-driven development
- > Increased the Sandbox composition to meet individual development needs and track changes efficiently
- > Baselining and backsynchronizing Vlocity components related to 3 sprint changes and multiple implementation teams from the Production org to 28 lower Sandboxes to update them with the latest code changes
- > Automated code coverage reports for every Sandbox to assure code quality and stability
- > Seamless and automated deployments of Salesforce metadata and Vlocity components to higher orgs
- > Automation of Pre and Post-deployment activities by:
  - > Data Loader Pro to add filters to 28 Sandboxes and migrate objects and custom setting data of over 200 records
  - > Environment provisioning to active/deactivate flows, triggers, validation rules, and workflow alerts during migration

## Value Delivered



Reduced time to market by 50% through streamlined release management

Early identification of quality concerns and reduction in defects by 50%

Enhanced developer productivity by 60%

Comprehensive and automated deployment and testing approach