

# Serving up success

Transforming customer service with Salesforce Service Cloud and a data-driven case management framework

The Modernization  
Engineering Company



## Summary

The client, a leading food manufacturing and distribution company, partnered with Sonata Software to overhaul its fragmented customer service operations. Sonata implemented a unified case management framework powered by Salesforce Service Cloud and integrated via MuleSoft. This solution automated workflows, centralized communications and enabled data-driven insights – resulting in improved SLA adherence, enhanced customer transparency and scalable operations.

## Customer overview

A US-based food manufacturing company, headquartered in California, specializing in custom dressings, sauces, oils and other foodservice products. It serves major restaurant chains, retailers and institutions across North America and internationally.

## Pressure points

The client faced inefficiencies in handling customer service due to reliance on siloed systems like AS400, SharePoint and multiple portals. Without a centralized case view, teams operated in isolation, causing delays and inconsistent communication. Absence of automation and analytics further impacted resolution times and visibility into trends.

- No centralized dashboard for cross-departmental case visibility
- No consolidated case categorization framework for escalations and complaints

- Delayed escalations due to absence of automated rules, notifications and communications
- Limited visibility into historical case data, preventing trend analysis

## Solution highlights

Sonata Software designed and implemented a comprehensive Salesforce Service Cloud solution that unified all case management activities into a single platform. The solution introduced intelligent automation for case assignment and escalation, replacing manual processes with rule-based workflows.

- A centralized communication framework was established, transitioning from Outlook-based emails to Salesforce-driven notifications that provided transparency to both sales teams and customers.
- To ensure seamless operations, Sonata utilized MuleSoft to integrate Salesforce with the client's legacy systems and JDE.

- The implementation leveraged parent-child case structures with integrated task management capabilities.
- Transportation Management System (TMS), enabling real-time shipment data synchronization.

## Results that speak volumes

- Efficiency gains: Reduced manual effort and errors through automation and integration
- Customer satisfaction: Proactive, transparent communication builds trust
- Scalable foundation: MVP focuses on key case types and integrations, with scope to extend in future releases

- Faster resolution: Improved SLA adherence with time-based escalation and routing
- Data-driven insights: Analytics and AI unlock patterns in customer escalations and complaints