

Serving up success

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



The Modernization Engineering Company

SONATA

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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

Delayed escalations due to absence of automated rules, notifications and communications

No consolidated case categorization framework for escalations and complaints

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.

The implementation leveraged parent-child case structures with integrated task management capabilities.

To ensure seamless operations, Sonata utilized MuleSoft to integrate Salesforce with the client's legacy systems and JDE.

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

Faster resolution: Improved SLA adherence with time-based escalation and routing

Customer satisfaction: Proactive, transparent communication builds trust

Data-driven insights: Analytics and AI unlock patterns in customer escalations and complaints

Scalable foundation: MVP focuses on key case types and integrations, with scope to extend in future releases