CASE STUDY

XO PUPS

A Pet Project: Finding homes for FURever Friends

XO PUPS

Introducing you to your Furry Forever Friend

XO PUPS is a boutique puppy adoption service located in Virginia. Its main retail space serves as a matchmaking hub for adorable puppies and prospective owners. XO PUPS prides themselves on putting their puppies' health and well-being first. They work with ethical breeders and help people find a FFF (Furry Forever Friend) that will best suit any individual's lifestyle.
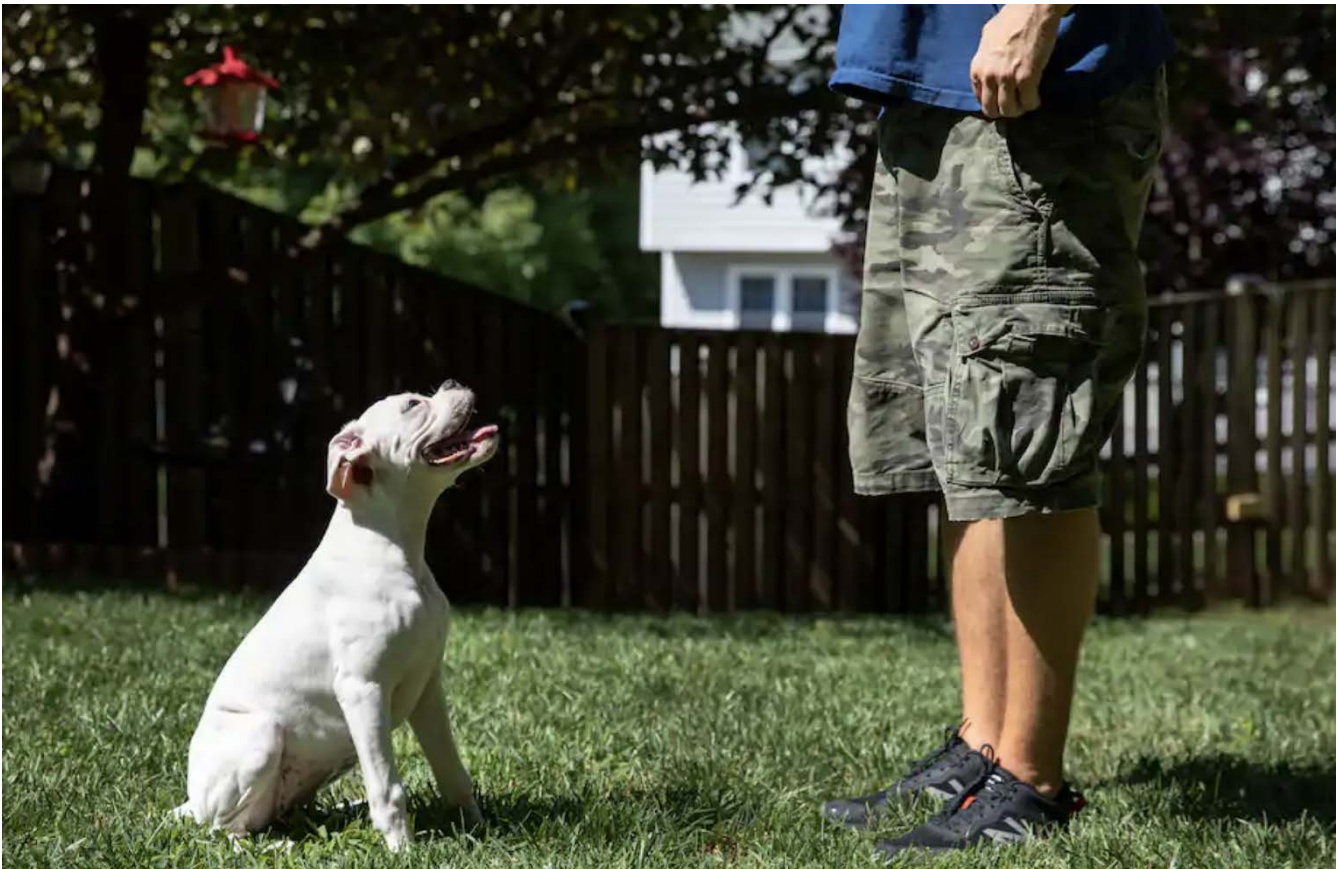
The Problem:

Matching customer breed interest to available puppies

The right pet can enrich a person's life, bring together a family, and inspire a healthier lifestyle. However, finding the right match is never easy. During the pandemic, the pet industry has seen a massive increase in customers and information from all directions: phone, emails, and in-person interactions. Keeping track of everything quickly became a massive challenge. The entire staff was putting customer contact information, interest, and address on post it notes all over the store. It was a mess.
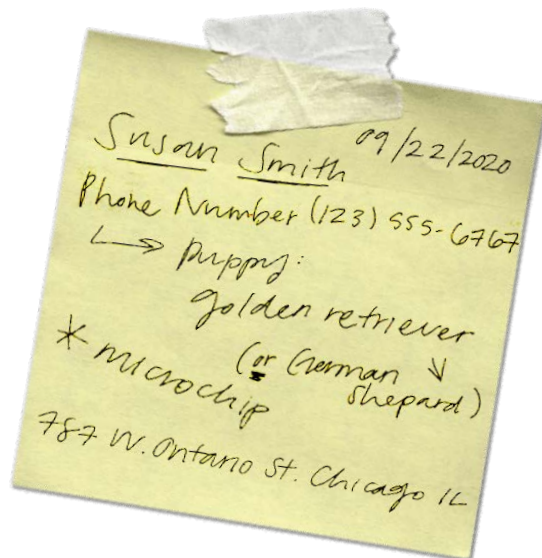
> " We were struggling with all the organization of paper notes around our office, so we bought the best CRM platform, but that clearly wasn't enough. - Jeremy, VP of Sales
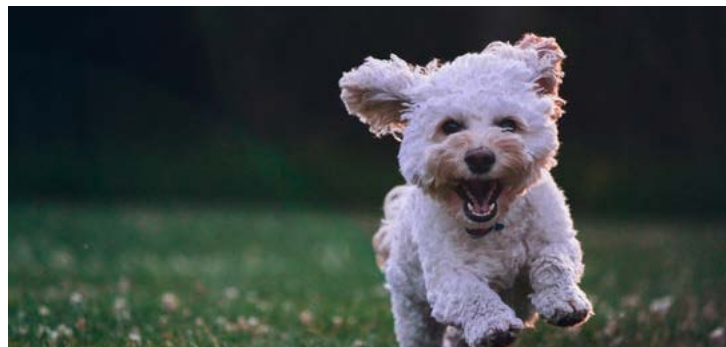
Even after trying to manage this in spreadsheets, binders, and better business processes, the operations were still losing data.

XO PUPS had to do something different.

And, like all good solutions, it started with Salesforce, the top platform for managing customer data on the market.

But that implementation was only a partial solution.

What XO PUPS really needed was a system to recognize opportunities as customers voice their breed of choice and interests.

The Opportunity:

A match made in...

Jeremy, the Salesforce Administrator and head of sales at XO PUPS, had a mandate to improve how his team was using Sales Cloud. With his own administrator skills sharpened through Trailhead Training, Jeremy knew that the capabilities of Sales Cloud could be customized for his team's needs.

Jeremy is a power-user of his team's kennel management software, PetKey, and had already coordinated a successful integration into xopupsva.com before engaging with our team at Digital Mass. This integration allows XO PUPS to present the available puppies with prospective customers on the web. What was missing from this integration was a little more intuition that staff needed to better serve their customers.
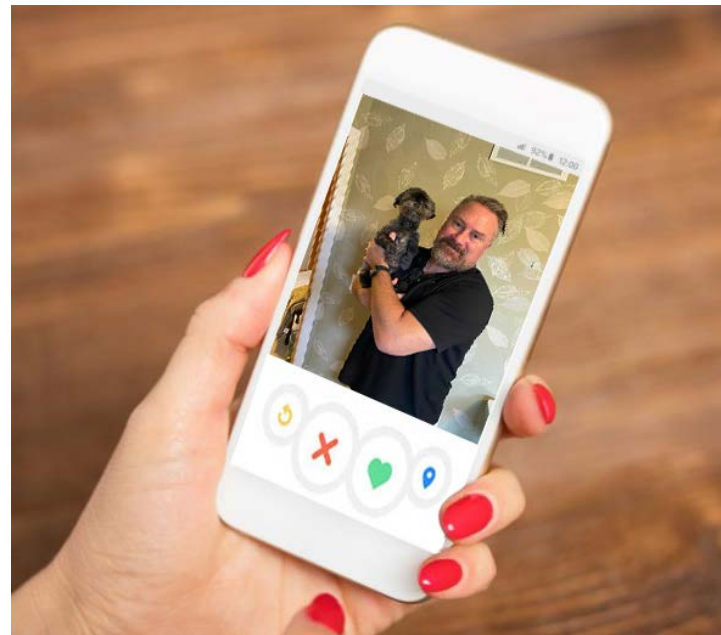
A matchmaking mechanism, if you will.

PetKey was XO PUPS's kennel management software of choice. The system offered a couple of integration options that would make an API available to its partners. The API is focused in its scope and offered some specific kennel exploration endpoints such as:

- **seeing** available breeds
- **learning** more about specific breeds
- **searching** for available pets
- **learning** more about specific pet personality traits
- **a guided questionnaire** to match customer lifestyles with specific breeds.

The Opportunity:

(Continued)

> " At the end of the day, we're a matchmaking company. Digital Mass recognized this fast and built the technology we needed to bring our simple manual process to life. - Jeremy, VP of Sales

To make the integration effort easy to use, PetKey offers a JavaScript library that wraps the available endpoints. By design, it is opinionated and importable as a module into Wordpress sites that are common among small businesses. By default, this library builds a table for customers that acts as an accessible and searchable display of available pets.

Given the nature of Salesforce and its available run times, dropping this partner library into Salesforce was not an option. This project would require self-assembly and heavy lifting. That's where Digital Mass comes in.
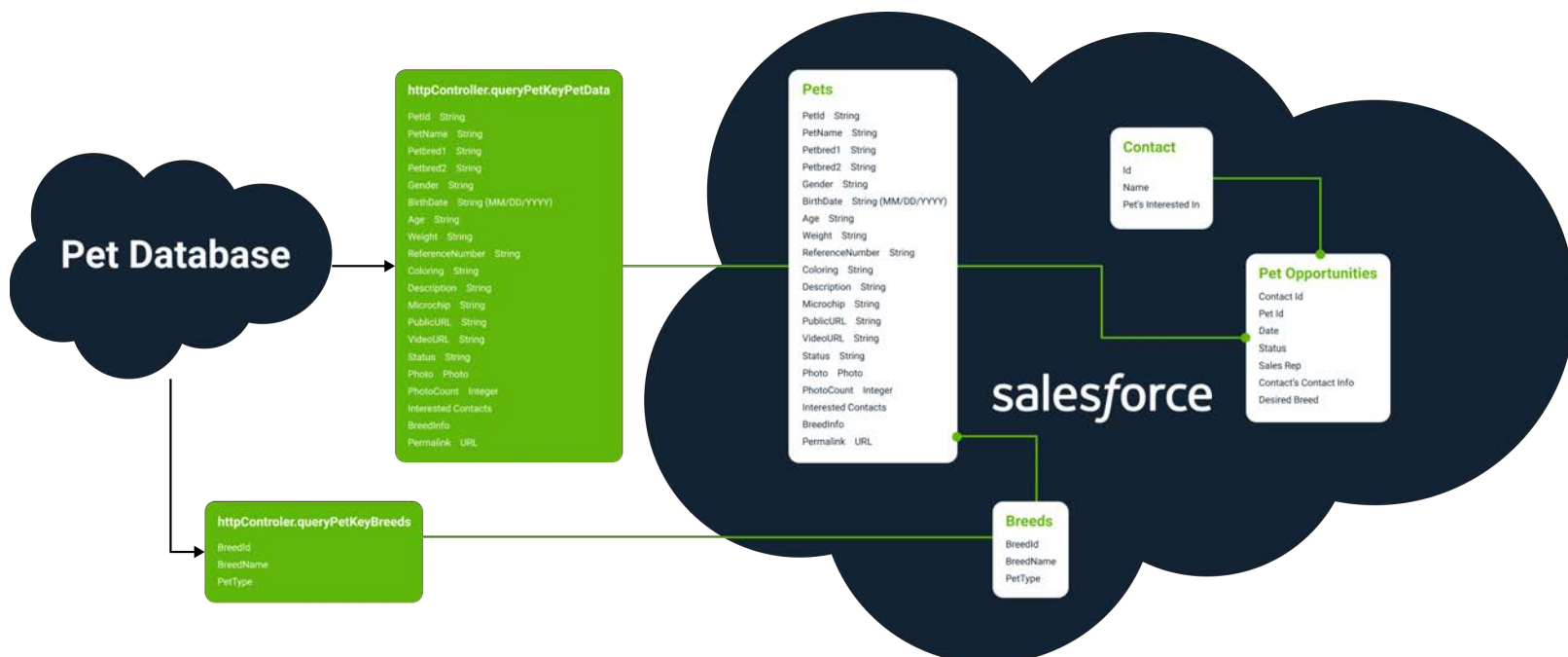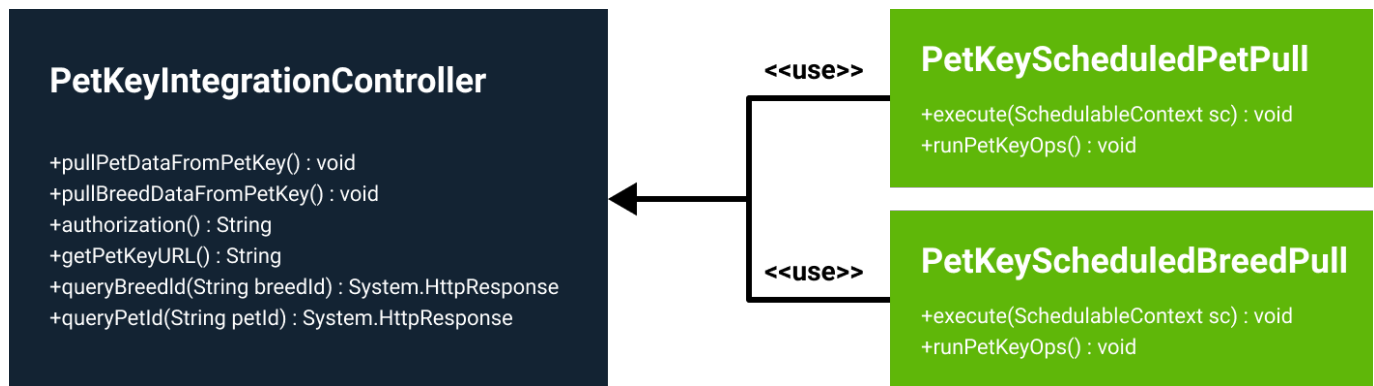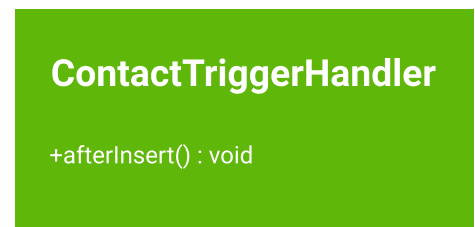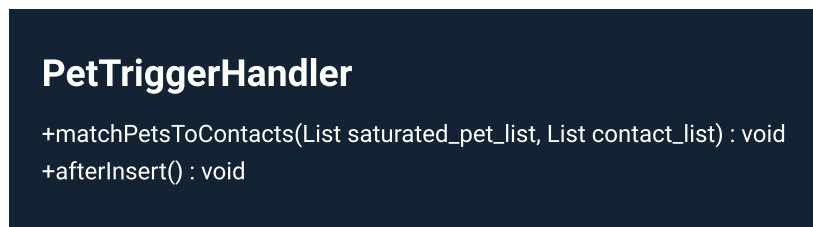
The Solution:

With the right team and the right platform, anything can work with Salesforce

Working with Jeremy, Digital Mass engineered a suite of custom classes to interact with PetKey in a way that smoothly interlocked with the existing sales process and supported customer interaction: in store, over the phone, or through email. Each of these interactions presents an opportunity for a potential customer to express an interest in a specific pet or breed of dog.

PetKeyIntegrationController

+pullPetDataFromPetKey() : void
+pullBreedDataFromPetKey() : void
+authorization() : String
+getPetKeyURL() : String
+queryBreedId(String breedId) : System.HttpResponse
+queryPetId(String petId) : System.HttpResponse

<<use>>

PetKeyScheduledPetPull

+execute(SchedulableContext sc) : void
+runPetKeyOps() : void

<<use>>

PetKeyScheduledBreedPull

+execute(SchedulableContext sc) : void
+runPetKeyOps() : void

Digital Mass used the batch system as the vehicle for the integration to reliably sync records on an expected schedule. Additionally, we built a custom matching algorithm to provide instant feedback to the sales team by capturing customer preferences in some existing fields on the Contact object. Using natural language processing on customer requests, we compared customer interest to the available puppies in the kennel. We also knew that sometimes the request was not available-- yet. So, we built the inverse of this matching system to present an opportunity to the sales team that will show when a new pet entering the system matches what a customer was looking for.

PetTriggerHandler

+matchPetsToContacts(List saturated_pet_list, List contact_list) : void
+afterInsert() : void

**ContactTriggerHandler**

+afterInsert() : void

The Solution:

(Continued)

Each Salesforce organization has their own quirks. XO PUPS was clever in taking advantage of platform licenses that Salesforce offers in order to empower their sales team without having to break the bank.

XO PUPS has an enterprise license of Salesforce, allowing them to use the power of Salesforce without the Salesforce bill. Our engineers made sure that the solution we designed would work with both their Sales Cloud and Platform level licenses through using a handful of custom objects. We were able to guarantee that the experience would be the same for all of their staff.

Pet Added
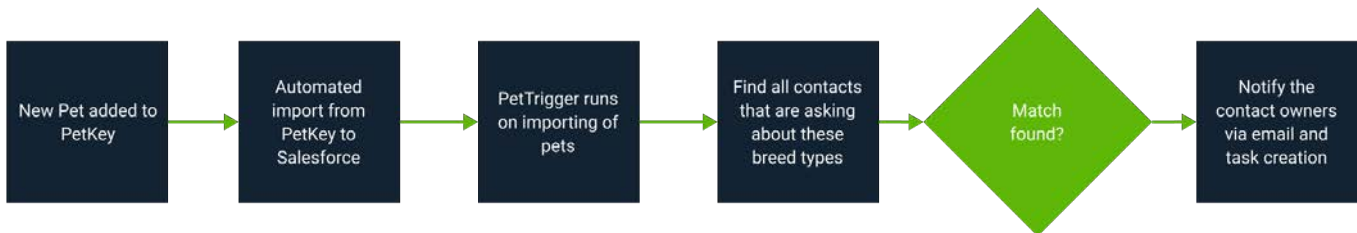
Contact Added
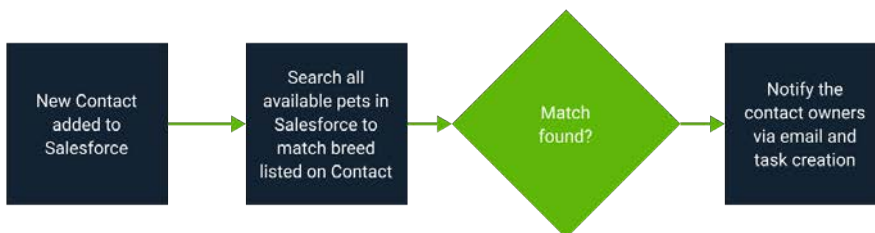
The Results:

Saving necks from the swivel head problem

After rollout, the XO PUPS staff had a native Salesforce Sales Cloud extension that provided them with fast feedback as customers interacted with their store. Their sales team no longer has to jot down information on post-it notes or try to manage a counterintuitive spreadsheet. Now, they can simply use the system to input information and indicate opportunities. Team members no longer need to "check in the back" for pets that they may have in their kennel. This new structure is time saving and convenient, allowing for remote capabilities. Additionally, the PetKey Sales Cloud extension is tunable by the internal team.

The XO PUPS team no longer need to manage multiple sets of keys in order to find inventory and conduct their sales process in real-time. They also have a great new message when reaching out to new (and past) customers, "We have the right puppy for you."

Unlike our furry friends forever, the PetKey extension also cleans up after itself.

salesforce sales cloud

> " The Digital Mass team really blew us away. They got to work fast and showed us the power of Salesforce. Not only did they save us money and deliver, but they brought us a new way of thinking and helped the way we sell with an innovative matching algorithm. - Jeremy, VP of Sales

About Us

The new wave of Salesforce experts building next-generation customer-focused sales solutions.

Founded in 2017, Digital Mass is a Salesforce Partner focused on turning your Salesforce implementation into a customer-focused juggernaut. Not only do we have the engineering acumen needed to build modern tech solutions, we have the craftsmanship to deliver brilliant results for clients with complex processes.

Our team of full-stack stars are in the sweet spot between ambitious, nimble, curious, and excited. We bring our clients source-driven implementation through purpose-driven processes. The strong foundation we have in web services allows us to play well with other technology: AWS, Salesforce Marketing Cloud, Tableau, and virtually any other major sales or marketing software. A new source-driven age has dawned in Salesforce and Digital Mass is at the Apex...(sorry for the pun).

LET'S CONNECT

Let's work together to design, build, test, secure, and implement a killer Salesforce Machine

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