

CUSTOMER **SUCCESS STORY**

CloudSmiths and Salesforce grow SIZA's sustainability vision

SIZA (The Sustainability Initiative of South Africa) is a non-profit organisation that oversees ethical labour, trade, and environmental programmes for primary agriculture in South Africa. The organisation works with government, labour and civil society, producers, exporters, importers, retailers, and other internationally accredited industry bodies across local and global supply chains. SIZA is a freestanding, independent custodian of assuring environmental sustainability and the continued improvement of labour conditions in agriculture. "The programme monitors, evaluates and reports on ethical and environmental compliance throughout the value chain, and is focused on continual improvement and a best practice approach. It consists of online self-assessments that are followed up by independent third-party audits. The audit process goes beyond a single pass or fail approach – it incorporates a longer-term vision of attaining a better and more sustainable industry," explains Werner Van Dyk, Audit Manager, SIZA.



The Challenge

SIZA's legacy system had become outdated, expensive, and difficult to maintain. With constant legislation changes, adding an environmental module to the programme, and software that was no longer compatible with many of the devices utilised by users, the time had come to migrate to a cloud-based solution. "In light of our specific requirements and what we wanted to achieve, we decided to partner with CloudSmiths and implement Salesforce Sales Cloud and Experience Cloud. It was the best decision we could have made," says Retha Louw, CEO, SIZA.

Critically, says Carmen Botes, Operations Officer for SIZA, the organisation required different screen views for their users: producers, auditors, buyers, importers and exporters, as well as an admin view. "The platform has levels of complexity, and a methodology with many rules that must not only allow the users ease of use, but also enable SIZA to analyse risk, monitor between audit periods, and analyse the data to make informed decisions. In addition, it must enable SIZA to implement further updates to the platform, seeing that the entire SIZA process is managed online through the MySIZA Platform."

Along with these requirements, the system needed scalability to upload additional users, and automated notifications and reminders. It was also necessary for data, documents, evidence, and visuals from the existing legacy to be migrated to the new platform.

Enter the Smiths



The project required an upgrade of SIZA's legacy platform to a cloud-based solution, with the functionality to be modified by internal administrators. The goal was to connect users and data across a scalable, integrated CRM (customer relationship management) platform. "We were seeking a solution that encompassed our wider offering and increasing user numbers, with the capacity to accommodate our growth and expansion as we acquire new members, buyers and industry stakeholders," says Retha Louw. CloudSmiths and their Salesforce solution was the perfect fit for SIZA, and the new partnership grew quickly in trust and confidence.

“We were looking for a collaborative project partner – not just a service provider - to take us through our platform transformation journey. Everything fell into place when we spoke to CloudSmiths for the first time. It was as if the decision has been made for us. Trustworthy, highly competent – they were our people.”
RETHA LOUW, CEO, SIZA.



Target Market

SIZA has more than 3 500 members (Social and Environmental) comprising suppliers, producers and buyers, exporters, importers and retailers, industry organisations across the entire value chain, and service providers that supply the skills and resources for capacity building, training, and support.

The organisation works with over 291 businesses across 68 countries and offers many benefits to businesses and thousands of employees in the agricultural sector.



The Solution

CloudSmiths implemented the Salesforce Cloud CRM platform and the Experience Cloud social platform to create their new platform, MySIZA, to connect SIZA's stakeholders with their suppliers, and to access, capture and monitor data and records. The project scope had multiple complex components and rules to take into consideration, and with these requirements in mind, a customised build – a key benefit of Salesforce Sales Cloud - formed part of the solution. The project commenced with a 3-month set-up phase to ensure the team understood the precise requirements of the SIZA programme.



Timelines and Social Distancing

The migration from the legacy system to MySIZA on the Salesforce Experience Cloud and Sales Cloud took almost 12 months, overlapping with a worldwide pandemic that allowed CloudSmiths to demonstrate their flexibility, agility and commitment to SIZA as the team navigated through an uncharted landscape. Initially the interaction adopted a blended approach utilising face to face and remote meetings, but as the pandemic broke, CloudSmiths utilised fully remote teams to successfully finish on time. “Our expectations of what we wanted from our project partner were realised and exceeded,” says Retha.



The Result

The all-new MySIZA platform incorporates a host of features that are designed to eliminate user pain points, while ensuring accurate and correct information is uploaded and captured. The simple, clean UI (User Interface) utilises lightening components that allow for an end-to-end experience with ease of upload and viewing of files. Other features include:

- Better connections between stakeholders
- Online chat
- Integrated and secure online payments
- Customisable data
- Customisable fields
- Flows and processes to alert relevant parties of actions required
- Multiple device alerts
- Email templates for customised correspondence
- Time-efficient audit bookings
- Real-time approvals and reviews of self-assessment questionnaires
- Retention of historical data
- Easier navigation
- Easy document upload and viewing
- Simple process to add users
- A Data hub, which creates a wealth of information
- Digital monitoring and evaluation



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Empowerment and transparency

The new MySIZA platform has the functionality to send automated audit information to the producers, to allow for corrective actions to be taken against areas of non-compliance. As the producer implements the corrections, the platform updates and notes the producer's audit status while issuing an audit confirmation document. This allows the grower to sell their product to buyers by showing that they met market requirements. In this way, the system encourages improvement from the producer, while assuring transparency and objectivity to buyers and importers.



Safety and security

By migrating to a cloud-based platform, SIZA has enabled its stakeholders to connect in real-time while maintaining the security, integrity, and safety of the data. Visibility rules apply to protect producer privacy and information. The platform accommodates multiple logins and views, depending on the profile of the user. Only the auditor that is appointed to a producer can view that producer's information, while the risk of certificate fraud has been minimised through security features built into the platform. The CloudSmiths team also included a decision matrix into the build, which assesses the data logically, weighing it as variables based on its importance in the audit process, to ascertain whether or not an audit confirmation letter can be issued.



Support and maintenance

With fast-changing timelines, working around the globe in different time zones and the necessity of quick turnaround times, MySIZA can afford no downtime. Maintenance and support are critical to the platform - without it, SIZA cannot operate. It is the heart of the organisation and the centre of its operations.



Why CloudSmiths?

In CloudSmiths - Salesforce's largest partner in Africa - SIZA found a trusted partner. Sales Cloud and Experience Cloud gave the non-profit exactly what they were looking for, plus all the soft skills - approachability, service excellence, willingness to go the extra mile, cohesive teamwork.



What's next?

With the first phase of the project completed, and most of the minor issues untangled and smoothed out, SIZA has once again partnered with CloudSmiths, indicative of the organisation's trust in both the Salesforce CRM solution and in CloudSmiths' ability to deliver. The second phase incorporates Key Performance Indicators for digital monitoring related to water management, the carbon footprint, and other environmental issues around producer sustainability. Also on the horizon is the development of an API (Application Programming Interface) that will allow MySIZA to link to international platforms in the UK, Europe, and other regions.



Value Benefit

"CloudSmiths exceeded our requirements both in terms of the project brief and the calibre of partner we were looking for. Their values, culture and ethics align with our business. It was a pleasure to work with CloudSmiths during this project and we are looking forward to the next phase." - Retha Louw, CEO, SIZA.



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