

“ Automated Template Selection To Help Overcome Busywork under Billed Hours ”

Company Overview

Industry Type

Financial Services Firm

Solution Used

Salesforce and Automation

Location

New South Wales, Australia



Challenge

- At the time, the client used the Conga composer to furnish documentation for their customers. However, template selection based on the customer's specifications of the customer in Conga is a manual process.
- The Client was using logic built into excel spreadsheets to determine the template to be picked and sent to the customer.
- Lack of automation in the Salesforce system kept the client from leveraging existing data to auto-select a specific template and send an email to the customer.



Solution

- As a part of our solution, we made it viable for the client to generate Conga IDs based on the specifications of their customers.
- Automating this functionality through code enabled the client to auto-update the Conga ID whenever a customer's family member or policy was appended.
- Consequently, the email sending functionality is automated and has saved a lot of agent time that was earlier invested in sending emails to their customers manually.



Result

- Owing to the solution we provided to the client, the time taken to select and send a suitable template to their customer based on their specifications has reduced significantly.
- Now, the information gets stored in Salesforce, as opposed to crude excel sheets, which onset a fall in duplicity of information and errors as well.
- Lastly, the ease of sending out automated emails to the customer from within Salesforce helped them save time spent switching between inboxes.