

Salesforce

Success Stories

Healthcare Industry



Key Success Stories

Healthcare Company
with Global
Presence

Tech : Salesforce Platform, Service Cloud, Einstein AI

- Enabled insight-driven decisions driven by sophisticated AI models
- Enabled reps to focus on right leads & customers at the right time with powerful insights-driven decisions
- Increased Lead and Deal conversion – observed 2% increase in the first month
- Superior user experience and reduced overhead with integrated insights

Leading Healthcare
insurance giant from
Minnesota

Tech : Sales Cloud, Marketing Cloud

- Integrated salesforce marketing and sales cloud to bring both ecosystem together
- Helped streamline the process of campaign creation and management
- Clear visibility on campaign performance for data-driven decision making
- Reduction in integration time with external analytics application

High quality virtual
behavioral health
care company

Tech : Salesforce Platform, Health Cloud, Service Cloud

- Service Center Deskpro Migration to Salesforce Cloud
- Reduced ticket volume by 30% which means a reduction of over 1000 tickets/month.
- Reduced Average Handle Time and Wrap Up Time (phone Calls). Total time savings of 75 agent hours/month
- Reduced Average Time to Resolution(Cases). Estimated average time savings of 230 agent hours/month or 2 min per case

Proven solutions for
health systems,
employer groups,
and insurance
providers

Tech : Service Cloud, Community, B2B Commerce, Mobile Apps

- Migration from homegrown CRM to Salesforce Service Cloud
- Enabled data driven marketing journeys to reach customers in new way
- Increased Marketing ROI by 38%
- 360-degree view of customer, enabling detailed Marketing Journeys and campaigns

American healthcare
company

Tech : Platform, Health cloud, Salesforce Marketing cloud

- Implemented Salesforce Health Cloud and Field Service Lightning (FSL) to provide the Coaches with a platform to run video coaching sessions with members
- Attracted new customers and growth in business by 20%
- Provided efficiency in booking and communicating around appointments
- Attracted new clients and growth in business

Global leader in
innovative hearing
care solutions

Tech : Salesforce Platform, Sales Cloud, Marketing Cloud

- Sales cloud and marketing cloud implementation for performance evaluation, lead tracking and visibility to drive business growth
- Captivate strong process of viewing HCP response time to leads and track performance of own Retailers vs competitors
- Sales growth 28%, Network of >3500 stores and clinics, 18 Key Markets

Case Study

Quicker insight-driven Decisions for a Global Healthcare Company



Healthcare Company with Global Presence

Enabled insight-driven decisions driven by sophisticated AI models

Enabled reps to focus on right leads & customers at the right time with powerful insights-driven decisions

Case Study



CHALLENGE

- Influx of leads, hard to filter and prioritize leads for sales reps
- Inability to quantify lifetime value of customers
- Hard to understand influencing factors for deal conversion vs. source channels
- Harder to analyze & visualize data, which is spread across multiple systems
- Inefficient operational dashboards
- Inability to outline & respond to customer sentiments
- Providing Insights on Product Pricings and Utilization/Achievement analysis of Sales reps by Region and Team
- Inability to manage and analyze Pipeline based on Improvement points from Kaizen Meet.



SOLUTION

- Improved productivity of reps and efficiency using Einstein Prediction/ Recommendation & Next Best Action
- Seamless data connections to external platforms using Einstein connectors, to collate & analyze external influencing data and Salesforce data
- Enabled reps to identify differences between segments and identify high-value customers
- Use conversations in emails, forms, notes, or chatbot inquiries and determine sentiment
- Enabled agents to view insights & perform actions in context of summarized data / insights, and improve clarity and efficiency
- Performed customer multitouch journey to track all channels targeted at customers and leads
- Account and Lead scoring driven by multiple data points within Salesforce and other enterprise systems
- Provided Interactive Pricing CoA for all product Bundles and a secured View to SIC & SBU Leaders to analyze their Regions/Team's performance.
- Provided an Insights dashboard guidance is an effect of collaboration between several teams that participated in Imaging Funnel Management DMS Kaizen in February 2023 with all KPIs and Historical data to provide performance and improvement Insights.



RESULTS

- Increased Lead and Deal conversion – observed **2% increase** in the first month.
- Superior user experience and reduced overhead with integrated insights. Improved productivity – ability for agents to handle more leads (**10%+ in the first quarter**)
- Comprehensive, standardized lead & opportunity management processes address diverse requirements across regions
- Optimized Dashboards shown **15%** higher Adoption.
- It helps to understand the Target Achievement % for each product and team to launch new programs and increase Sales.
- Pricing Dashboard across prominent regions to identify biggest deals in which we notice low profitability to allow commercial teams take necessary action for values > **\$5M**.
- Provided an Insights dashboard guidance on “how good looks like” & conduct “self-coaching” for improvement areas with KPIs within area of funnel, provides estimated wins with adoption of **30%** (one of Top 10 dashboard).

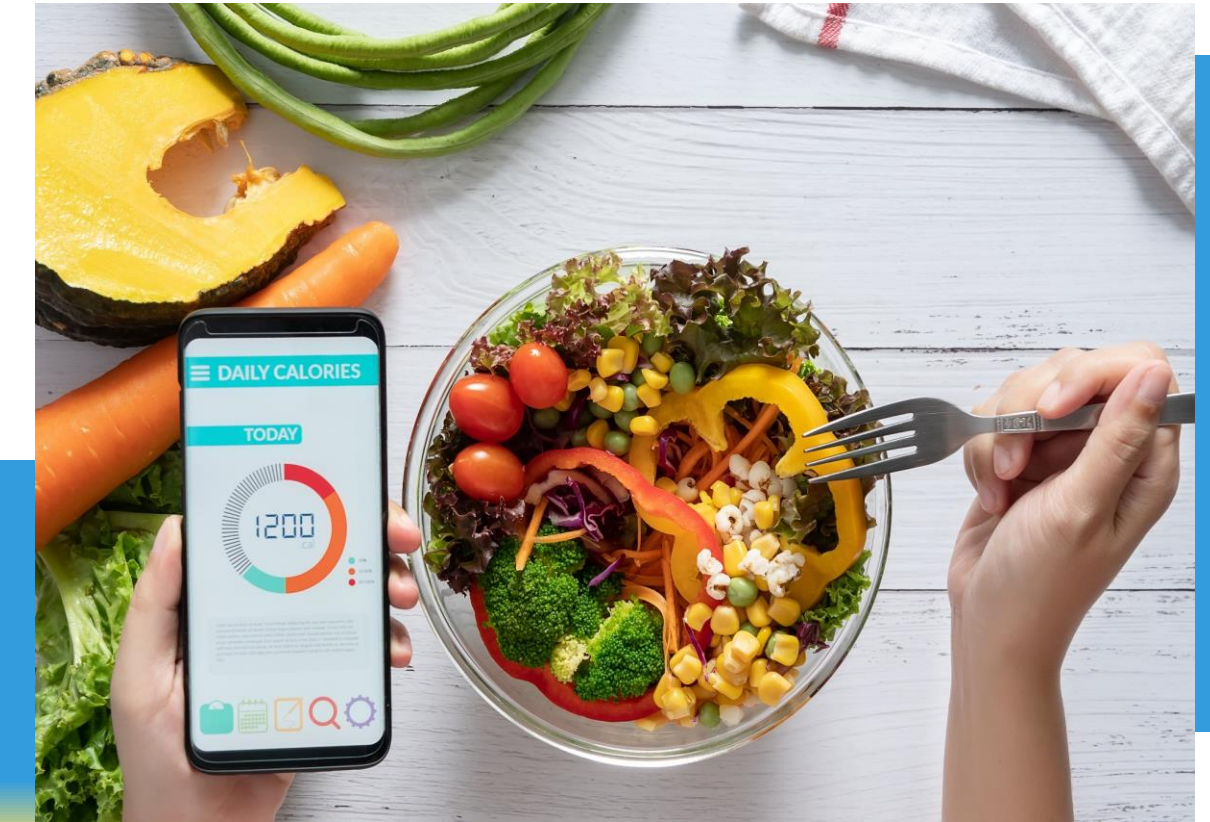
TECH STACK

Salesforce Platform, Service Cloud, Einstein AI, Discovery, Tableau CRM

Case Study

Drive Competitive Advantage Through Digital Transformation

Proven solutions for health systems, employer groups, and insurance providers looking to address the problem of obesity



Increase of Marketing ROI by 38%

Enabled data driven marketing journeys to reach customers in new way

360-degree view of customer

Case Study



CHALLENGE

- A technology deficit that would not allow them to quickly evolve their program and outpace competitors and need to replace multiple platforms at once to modernize their customer experience
- Mostly in-house systems, with many one-off solutions for client facing interactions
- Disjointed user experience, not enhancing or enabling the Program
- Many logins for customers to manage



SOLUTION

- Migration from homegrown CRM to Salesforce Service Cloud
 - Enabling basic contract and account management
 - Custom program tracking implemented to track customers' journey and progress through the program
 - In-depth reporting and analytics to identify points of attrition in the program
- Self-Service Community
 - OrchestraCMS implemented to manage web content
 - Salesforce Knowledge implemented for article management
 - Salesforce questions implemented for managing customer discussion threads
- B2B Commerce - delivers a rich, content heavy commerce experience with excellent performance
- Mobile Apps



RESULTS

- Increase of Marketing ROI by 38% - Enabled data driven marketing journeys to reach customers in new way
- Customers were migrated to one login and experience from up to 5 in the previous state
- 360-degree view of customer, enabling detailed Marketing Journeys and campaigns
- Increased focus of HMR brand allowed for eventual channel conflict resolution and additional revenue streams to HMR Corporate

TECH STACK

Service Cloud, Community, B2B Commerce, Mobile Apps

Case Study

Facilitating dental appointments and treatment journey with customized Salesforce functionalities

Teledentistry company headquartered in the US



50% reduction in sales cycle time

80% increase in user adoption

Single source of customer and pricing data creating a 360 view of the customer

Case Study



CHALLENGE

- Efficient way to manage product pricing for their wide range of products or services
- Transitioning Sales, Dental, Treatments daily tasks from native in-house systems to Salesforce.
- Increase productivity of the Sales Reps, Dental agents, Field officers by having majority of their daily tasks managed within Salesforce.
- Streamline complaint handling process



SOLUTION

- Device agnostic Salesforce Lightning platform enabled users to manage customer treatment journey right from the initial screening appointments to the treatment completion.
- Streamlined the overall dental treatment process.
- Single source of customer data creating a 360 view of the customer.
- Lighting components for seamless experience on the service console
- Automated capture of customer interactions and created log notes for sales and service agents in Salesforce using lightning components
- Live Agent optimization, custom Omnichannel setup and Einstein chat bots for support
- Enabled email to case with custom skill based routing engine
- Setup of AppExchange products like SightCall, Five9 for faster problem resolution and enhanced support



RESULTS

- 50% reduction in Sales cycle time
- 80% increase in user adoption
- Streamlined processes resulting in consistent services and improvement in Customer Satisfaction
- Automate the overall Sales, Marketing, CRM user experience
- Efficient and automated case management through live chat
- Holistic interface for support agents for faster case resolution
- Improved productivity and error free deployment process with MBOT CI/CD
- Seamless integrations of Salesforce with other systems of the customer

TECH STACK

Salesforce Health cloud, Service Cloud, Platform, Experience Cloud

Case Study

Cross Cloud Integrations – Campaign Management and Implementation

Leading Healthcare insurance giant from Minnesota

Streamlined the process of campaign creation and management

Clear visibility on campaign performance for data-driven decision making



Case Study



CHALLENGE

- Client ecosystem had salesforce sales cloud and marketing cloud, but these ecosystems were working independently
- Marketers were unable to track their campaign performance effectively
- Sales led campaigns had lengthy orchestration process
- Unable to track patient activities across channels
- customers are constantly moving in and out of various channels and, as a result, customer journeys are becoming increasingly complex.



SOLUTION

- Consulted on their campaign build process
- Integrated salesforce marketing and sales cloud to bring both ecosystem together
- Implemented campaign management accelerator to track campaigns
- Assisted the marketing and sales team to setup campaigns using sales cloud and drive campaigns easily
- Track customer activity across multiple channels
- Collect customer data across first- and third-party data sources
- Track performance of each campaign and analyze the performing channels
- Ease of searching assets in marketing cloud app
- Safe and secure without the need of any additional salesforce licenses
- Reduces administration time for marketers
- Uses native salesforce platform capabilities



RESULTS

- Helped streamline the process of campaign creation and management, customer was able to track lead conversion metrics using out of the box features
- Sales team were effectively adding campaign members in sales cloud and drive campaigns using marketing cloud
- Management team had clear visibility on campaign performance
- Ease of searching assets in marketing cloud app
- CMA tags assets to the native SFMC campaign automatically
- CMA helps in tracking campaign and asset performance using out of the box marketing cloud reports
- Integrates with salesforce CRM campaign management for end-to-end tracking
- Reduction in integration time with external analytics application
- Ease of searching assets in marketing cloud app
- Safe and secure without the need of any additional salesforce licenses
- Reduces administration time for marketers
- Uses native salesforce platform capabilities

TECH STACK

Marketing Cloud, Sales Cloud

Case Study

Drive Patient Transformation with the power of Health Cloud and Field Service Lightning



American healthcare company

Attracted new customers and growth in business by 20%

Provided efficiency in booking and communicating around appointments

Implementation of Sendbird integration allowing direct communication between coaches and members.

Case Study



CHALLENGE

- Coaches' efficiency was limited by the current technology and disconnected from customer's systems
- Previous systems did not support video coaching sessions with its members. The previous technology provided insufficient methods for appointment booking for coaches as well as members.
- Unavailability of methods for the coaches to communicate with members in both group and 1:1 sessions



SOLUTION

- Implemented Salesforce Health Cloud and Field Service Lightning (FSL) to provide the Coaches with a platform to run video coaching sessions with members
- Provided coaches and Demand Managers with appointment booking action to book appointments for coaches; Members to book appointments from a 3rd party website by leveraging FSL API.
- Lightning enabled SendBird integration leveraging Marketing Cloud and Marketing Cloud Connect to Health Cloud to trigger the right communication to Coaches and Members.



RESULTS

- Able to book appointments in 3rd party website that remain visible for coach and member
- Provided a holistic platform view for Coaches; Members can specify which communications they want to receive from the customer
- Provided efficiency in booking and communicating around appointments and Demand Managers are able to efficiently schedule optimally-skilled Coaches for group sessions with members
- 20% increase in members; Attracted new clients and growth in business

TECH STACK

Salesforce Platform, Salesforce Health cloud, Salesforce Marketing cloud, mobile app

Case Study

Service Center Deskpro Migration to Salesforce Cloud



High quality virtual behavioral health care company

Total time savings of 75 agent hours/month

Maximum Automations to reduce manual work of service center agents to convert leads into customers and to maintain relationship with customers.

Case Study



CHALLENGE

- Service Centre agents were using Deskpro which has more complex workflows and duplicate data, lesser automations and increased the manual work.
- Reducing the complexity of workflows, data redundancies, routine, repetitive and rule based manual work was challenging.
- Limitations in customizing the existing software to user's preferences.
- Less customer satisfaction survey responses after the service.



SOLUTION

- Implemented solution to support follow up email communication through salesforce and customer satisfaction surveys to get feedback on Service Centre Agent's services
- Implemented workflows for tickets submitted by participants, to allow participants to submit cases via email-to-case functionality.
- Introduced participant ticket submission web form, workflows for tickets submitted by providers via web form.
- Integration with Adobe to send digital documents for e signature for program agreement. Tracking the agreements and reporting on the same.
- Encrypted email communication sent to participants to any email address outside network. Trend, Historic and Multiple data source reporting.



RESULTS

- More Reduced ticket volume by 30% which means a reduction of over 1000 tickets/month. Eliminated need for duplicate tickets in DeskPro.
- Reduced Average Handle Time and Wrap Up Time (phone Calls). Estimated average time savings of 4min per case, on 32% of phone call cases. Total time savings of 75 agent hours/month.
- Increased number of customer satisfaction surveys responses by 40% by introducing Phone CSAT.
- Reduced Average Time to Resolution(Cases). Estimated average time savings of 230 agent hours/month or 2 min per case.
- Improved CSAT scores as a result of reduced time to resolution, target increased of positive ratings by 5%

TECH STACK

Salesforce Platform, Health Cloud, Service Cloud

Case Study

Sales cloud and marketing cloud implementation for performance evaluation, lead tracking and visibility to drive business growth



Global leader in innovative hearing care solutions

Implementation of a Salesforce Sales Cloud and marketing cloud to accomplish lead generation

Captivate strong process of viewing HCP response time to leads and track performance of own Retailers vs competitors

Sales growth 28%, Network of >3500 stores and clinics, 18 Key Markets

Case Study



CHALLENGE

- Customer on their website had contact us forms which were capturing information, and some auto-generated emails were getting sent to the leads.
- There was no system that could track the leads' traversal through the sales funnel especially for 3rd party retailers
- There was also, no fair assignment of leads to retailers available in the leads' serviceable area



SOLUTION

- Standardized lead generation process was established for all geos using our best digital marketing practices.
- Integrated with their existing website to capture all lead data and increased visibility of lead's journey even when assigned to 3rd party retailers
- We used Journey Builder to send out the emails and Cloud pages to update the lead status changes as and when a certain action was performed by the retailers. This enabled tracking a lead's progress through its buyer's journey.



RESULTS

- Improved journey and increased participation from 3rd party HCPs; ultimately shortening lead conversion timelines.
- Increased participation from 3rd party HCPs and better understanding of geographical outreach

TECH STACK

Salesforce Platform, Sales Cloud, Marketing Cloud

Case Study

Accelerating growth in revenue and visibility among customers through targeted email marketing



Leading Home Infusion Service Provider

Implementation of Pardot Salesforce to drive 1:1 communication with prospects, customers and partners

Integration of Pardot with Salesforce CRM to align Sales and Marketing

95% Patient Satisfaction; 220k+ patients treated annually

Case Study



CHALLENGE

- Customer wanted to increase awareness of their services and drive referrals to grow revenue.
- Customer wanted the ability to send targeted 1:1 communications to current customers and prospects.
- Customer required a Marketing Automation solution and their Sales part of the business needed an upgrade



SOLUTION

- Implemented a comprehensive solution which included setting up Pardot and a connector to Sales Cloud, providing best practices on engaging key audiences and capturing website leads, and training their users
- Customer depended on our unique expertise in email marketing, lead nurturing, automated drip campaigns, and lead scoring to increase personalized communication with customers and partners.
- Enabled lead scoring to help prioritize follow up activities
- Empowered the customer to manage and grow Pardot in the future through internal knowledge transfer and training



RESULTS

- Simplified and faster execution of marketing campaigns with tracking of customers interaction with content
- Better segmentation of targeted customers based on pre-defined criteria leading to more personalized content
- Effective opportunity management (revenue split/sharing) and significant increase in lead generation, opportunity conversion rate

TECH STACK

Salesforce Sales Cloud, Pardot

Why LTIMindtree Salesforce Practice?



Summit Salesforce partner
with 20+ years
of Technology Expertise Top 5
MuleSoft partner



Systematic Innovation
through Digital Pumpkin &
Salesforce Garage



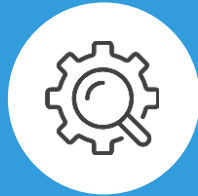
Three-time Salesforce
Partner Innovation
award winner



Proven experience in the
industry across
the ecosystem



Innovation Lab enables
continuous upskilling of
talent on the Salesforce
Platform



Salesforce and Integration Test
Automation framework



Proven IPs and Accelerators
for DevOps to ensure faster
time
to market



Anchor Partner of
choice for digital
transformation

To Sum it all up, LTIMindtree offers...

Unrivalled Digital Expertise in your sector



Services structured around your ideal technology ecosystem



A Proactive Collaborative, congenial team



Ability to scale without loss of quality or efficiency





Let's get to the
future, faster.
Together.

