

SAMPLE IMPLEMENTATION SNIPPETS

Automated and Improved User Experience for Event Management Firm

- Manual processes automated through Salesforce automation flows, eliminating delays and inaccuracies in sales operations.
- Custom objects created to manage vendor quotations, events, services, and track vendor invoices.
- Separate event management and service management objects developed to address the events and services provided by the client.
- Enhanced staff productivity by offering a comprehensive view of customers and their inquiries, all within a single platform, leading to increased efficiency.
- Automated emails improved timely payments from customers and acted as reminders for the customer, vendor, and internal teams.

Transforming Customer Engagement: Salesforce Implementation for Fintech Organization

- Implemented multiple Salesforce clouds - Sales, Service, and Community Cloud, with third party software integration for customer engagement, service and payments.
- Tailored case management workflows to categorize, prioritize, and route customer inquiries efficiently.
- Configured various communication channels - email, phone and chat, integrated into Service Cloud for seamless omnichannel support.
- Populated knowledge base with FAQs, product documentation to empower customers with self-service options.
- Automation rules configured to automate repetitive tasks - case assignment, escalation, notification.
- Created customized reports and dashboards to monitor key support metrics, track agent performance, and gain insights into customer satisfaction levels.

Furniture Manufacturing and Distribution Partner moved to Salesforce

- Customer is a manufacturing and distribution partner for a premier international designer and manufacturer of ergonomic furniture.
- Challenges included disparate systems, multiple spreadsheets, manual workflows, and inconsistent reporting.
- Customized Salesforce Sales Cloud to align with the company's unique business needs and workflows.
- Implemented lead management features to streamline lead capture, qualification, and assignment processes.
- Established customized dashboards and reports to monitor sales performance and track key metrics.
- Provided comprehensive user training to ensure smooth adoption and utilization of Sales Cloud by the sales team for client's various events.
- Results include a centralized platform for managing customer data, improved data accuracy, accessibility, reliability and better pipeline management.
- Unified and consolidated customer data and automation enabled sales team deliver more personalized and timely customer service, leading to higher customer satisfaction.

Enhancing Scalability and Flexibility for NGO through Non-Profit Success Pack (NPSP)

- Challenges: scattered donor and beneficiary data, limited email campaign storage, and insufficient visibility into potential leads.
- Program management module developed to manage manufacturing, post-sales processes, quality management and customer feedback.
- Program management automation reduced time and paperwork, eradicated usage of multiple spread sheets. Better visibility over potential leads, leading to increase in sales.
- Better decision making and clearer business picture of the operations through reports and dashboards.