



CoResolute

A Specialized CRM
Strategy & Technology Company



About CoResolute



Austin, TX-based CRM & Technology company with development resources in Pune, India



Business Transformation Consulting with CRM expertise, automation, AI/ML, and custom apps



Comprehensive CRM advisory & delivery for the entire customer lifecycle

Diagnostics

We **analyze** your requirements & buyer journeys to identify efficiency & cost savings opportunities



GTM, Campaign & Funnel Planning

Conduct Salesforce architecture reviews, document workflows, prioritize improvements, and manage campaigns



Design & Build

CRM architects and developers create & execute **custom apps and solutions**

Maintain Operations

We **handle** CRM backlog and neglected **issues like technical debt and data quality**

Analytics

Build the right data models & architecture to create **intuitive reporting**



CRM Growth Services



Implementations & Risk-Free Migrations

supporting required functions, work motions, and data collection

Summarization

Large text summaries for concise context

Company Evaluation

Evaluate health of a company with predefined global parameters

Audio to text

Get automated text conversion for calls in 50 languages. Better customer concern analysis

Sentiment analysis

Judge customer sentiment with the case content for better customer success

Large document analysis

Get summaries, answers and better results from large content and files

Lead scoring (industry based)

Score leads in real time based on industry standard defined parameters with score reason

Workflow Optimization with AI Elements



How To Work with Us

Short/Long Term Bespoke Projects

Buyer journey mapping, strategy, implementation, integration, M&A, data migration, application add-ons, and service backlogs.



Outsource Expert Managed Services

Level up your systems team with experienced architects, automation experts, developers, admins, and analysts



Cost Saving & Productivity Transformation

Cost, consistency, competency ensured through solution identification, ticket execution, CRM data services, license management, user onboarding, training, knowledge management

Led by Experienced Operators



CEO & Co-Founder, **Jason Linkswiler**

- Over **20** years of experience scaling to **\$300MM+**, raising **\$50MM+** in capital
- Consistent revenue and margin growth as an F100 operator
- Leadership in complex, global B2C, B2B, and B2B2C roles
- Expert in launching Business Transformation Offices and Process Optimization
- Revenue and operating leadership experience across multiple industries
- Respected thought leader and serial entrepreneur



CTO & Co-Founder, **Charudatta Thute**

- **15+** years streamlining and automating CRM operations
- Managed **10+** large scale CRM implementations
- Proficient in customer success and bespoke application optimization
- Strategic technical consulting
- Co-founder of CoResolute
- Achieved **\$30M** savings for fintech customer



Select Team Members



Akhil Dobariya
Sr. Salesforce Architect

Configurations, Migrations, integrations, and optimization. Certified 5 times in Salesforce domains



Kimaya Shirude
Salesforce Sr.Developer

Flows, Apex, Test Classes, Admin tasks, sharing rules, and security



Mayank Agarwal
Integration Expert

Admin with skills in APIs development, integration between systems with point to point and middleware-based integrations.



Serhii Lopka
AI and ML expert

Developed multiple ML based products using Python and CRM stack. Leads the AI stack development. Conducts AI/ML sessions for European universities.



Suresh Nathani
Sr. MS Azure Architect

Customer service-focused Technical Support Specialist with expertise in troubleshooting, conflict resolution, and cloud engineering. MS certified



Pragati Madke
MS Dynamics Architect

Experience in Microsoft Dynamics CRM, specializing in configuration, customization, deployment, and administration



Rohit Kumar
WordPress Architect

WordPress and e-commerce developer specializing in custom themes/plugins. Skilled in HTML, CSS, JavaScript, PHP, and MySQL



Ushakiran Durge
Rev Operations expert

Design, program, and manage marketing campaigns in SFMC and Pardot.



Sunil Dharan
Finance expert

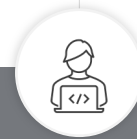
Lead finance motions for FinServe clients across Salesforce Ecosystem.

Salesforce Capability



Full Stack Operations Management

- Expertise showcased in **case studies** with **successful implementations**
- Automated **client connectivity** and onboarding using **screen flows**
- **Advanced GTM workflow** & automation creation
- **Streamlined support** and case management through automation



Custom Apps/AI Development

- **Customized processes** aligned with existing systems, optimizing **data for results**
- Explore our case studies showcasing expertise in planning and **data optimization**



Platform Maintenance Management

- Experience our transformative case studies on **deduplication**, CRM support, and **license management**
- Uncover the power of our **solutions**



Legacy Systems Integration

- Expertise showcased across industries, analyzing setups, integrating APIs, managing errors, and establishing **real-time setups**
- Tangible impact through **partnerships** and **transformative solutions**

Salesforce Customer Stories



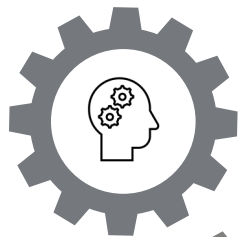
	Auto Industry	Credit Union & Insurance	Broker/Dealer Management	Fintech
Challenge	Streamline order tracking, pricing with Salesforce-ERP integration	Remove duplicates, optimize, automate for improved pipelines and usage	Personalized solutions, enhanced experience, minimized costs for customers	Revolutionizing sales and service operations for exceptional results
Solution	Salesforce integration <ul style="list-style-type: none">• Integration: Customer response & track feedback in ERP system• E-commerce: Track availability of auto parts for customers when ordering• Inventory: Calculate and offer quick e-shopping discounts for parts	Financial Service Cloud <ul style="list-style-type: none">• Sales Execution: Maintain credit union operations with financial services cloud• Retention: Improved insurance services visibility in single application for customers• Automation: Shift from silo apps, maintain operations in SFD	SF service and Sales Cloud Implementation <ul style="list-style-type: none">• Transition: Legacy apps sunset, support and sales move to Salesforce• Configuration: Configure Salesforce to meet broker dealer operations• Automation: Automate Sales for better pipeline & customer data with Sales cloud	Salesforce service and sales cloud set-up <ul style="list-style-type: none">• Sales: Achieve 360-degree customer view from prospect to support• Configuration: Ensure high customer satisfaction in support operations• Automation: Streamline processes, eliminate manual and silo applications
Customer Success	Retrieve real-time pricing from ERP for e-catalog in Salesforce	Track customer issues with incidents through a single application	Create a high level of customer service with service cloud	Maintain customer interaction and pipeline with Sales Cloud
Outcomes	<ul style="list-style-type: none">• Real-time pricing for 750+ parts• 200 orders/sec data availability• 2000 B2B daily orders• Efficient error log management for technical debt	<ul style="list-style-type: none">• Manage \$500mn insurance operations• automate support• handle 2k monthly tickets• automate customer process flows	<ul style="list-style-type: none">• Unified sales processes & managed 2000 support requests• saved 50% through legacy sunset• implemented 100+ flow-based automations• achieved 30% improvement in customer issue handling	<ul style="list-style-type: none">• Manage sales pipeline & automate processes with Salesforce flows• handle 5k monthly tickets• efficient unified ticket handling• manage 10+ GB documentation with Salesforce Files

MS Dynamics Capability



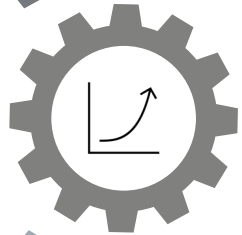
Services

Coresolute Microsoft Services: Simplify business processes and maximize outcomes with Microsoft Dynamics 365



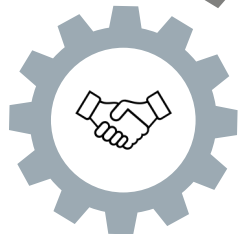
Implementation Services

Drive business value and growth with modern Microsoft technology



Upgrade Service

Upgrade systems, automate flows, gain insights with integrated Dynamics 365.



Support Service

Ensure continuity, monitor systems, achieve success with personalized support



Solutions

Committed to exceptional customer service and employee training.



Sales

Attract, engage, and serve customers in real-time with omnichannel efficiency using Dynamics 365 Sales






Customer Service

Enhance customer experience and empower your workforce with Dynamics 365 Customer Service

MS Dynamics Customer Stories



	Fintech	Insurance	Non-Profit
 Challenge	Enhance loan servicing with unified customer experience and automation.	Unify insurance support and customer experience with dynamics 365 for Texas based insurance company	Sunset current bespoke application of volunteer management and upgrade to MS Dynamics. Greenfield installation and setup for large Singapore Non-Profit organization.
 Solution	<p>MS Dynamics Benefits Realised</p> <p>Case Management: Automate support with email, integration, and SMS</p> <p>Automations: Upgrade to D365 for automated customer service and improved case management</p> <p>Integration: Seamless case management with integrated Outlook, Twilio, Azure, and portal</p> <p>Sunset: Upgrade to automated D365 for improved case management</p>	<p>MS Dynamics Benefits Realised</p> <p>Efficiency: Centralizes all necessary information and streamlines operations, enabling faster and more efficient response to client needs and regulatory requirements.</p> <p>Automations: The web application automates data and process management for support agents</p> <p>Omnichannel: Email, website or partner channel delivery across channels.</p>	<p>MS Dynamics Benefits Realised</p> <p>Case Management: For volunteer registration, membership benefits and services management.</p> <p>Contact: Manage membership and volunteer data across the board.</p> <p>Integration: Integration with Govt. systems for grants and donations information management</p> <p>Sunset: Upgrade to automated D365 for improved case management from current system.</p>
 Outcomes	<ul style="list-style-type: none">• 80% less manual tasks• 50% faster case resolution• Automated assignments and 95% customer satisfaction with SLA, Knowledge, and automation	<ul style="list-style-type: none">• 70% of customers information available for customer 360-degree view• 3x times faster appointment scheduling• 99% of cases resolved within defined SLAs and better visibility.	<ul style="list-style-type: none">• 90% member and volunteer data duplication issue addressed• Better 360-degree view of volunteers and services• #25k hours of annual savings in manual tasks with automation introduced.• 100% sync of donations/grants with government systems leading to high transparency

WordPress Capability



Delivering innovative, ROI-driven WordPress solutions



Custom Themes

Customized designs that reflect your brand's personality

E-commerce Solutions

Secure transactions, inventory management, seamless shopping experience for customers

SEO Optimization

Increase visibility, improve rankings, drive organic traffic to your website.

Our Work Process



01 Planning & Strategy

Define goals, audience, features. Create sitemap and wireframe



02 Design & Develop

Install WordPress, customize theme, plugins, widgets, content. Ensure responsiveness, SEO optimization



03 Test & Deliver

Review, test, and optimize website functionality, usability, and performance



04 Support

Ongoing support, maintenance, and troubleshooting for WordPress websites

WordPress Customer Stories



Challenge

Change resistance, integration, customization, security, coordination, technical expertise



Solution

WordPress Benefits Realised

User Experience: Improved navigation, scheduling, and medical record access

Operations: Streamlined administration, optimized billing, reduced manual efforts

Online Presence: Increased online traffic, improved engagement, broader reach

Financial Performance: Optimized revenue, reduced payment delays, improved financial outcomes

- User-friendly website increased traffic
- Seamless integration improved efficiency
- Convenient appointment scheduling enhanced patient experience
- Secure EMR integration enabled easy access to medical records
- Payment gateway integration optimized billing processes



Outcomes

Health Care

Hi-Tech Services

E-Commerce & Logistics

Build a website and app for internet plan purchases, integrate router data, and send WhatsApp payment reminders

Salesforce Integration

Integration: Connect offline business to online platform for internet plan purchases

E-commerce: Online internet plan purchases with cash on delivery and UPI

Inventory: Monthly user database updates via Excel, including overdue payments

Customer success: WhatsApp system: overdue payment reminders and plan expiration notifications

- Efficient platform for cash on delivery and online payments
- Automated overdue payment reminders via WhatsApp, website and app for purchasing & renewing internet plans
- Metadata integration for router identification and refundable deposits
- Streamlined process with API for plan renewal

Enhanced WordPress e-commerce for streamlined inventory, payments, shipping, and scalability

WordPress Benefits Realised

Efficiency: Streamlined operations and accurate inventory management.

Customer Experience: Improved checkout, diverse payment options, and live shipping updates

Scalability: Seamless expansion across multiple sales channels and platforms.

Competitive Advantage: Expanded payment choices, precise inventory, and enhanced customer satisfaction

- Accurate stock management
- Diverse payment options
- Real-time shipping tracking
- Automated operations and customer-centric growth for a competitive edge

Custom App Development on Salesforce AppExchange



Auto Sales Recommendation Product

Sales

Related products display, matching Opportunity count, upsell/cross-sell planning, data-driven insights for better account mining



Cross team collaboration

Better cross Team collaboration to coordinate for more product Sales/Marketing Better Trainings planning

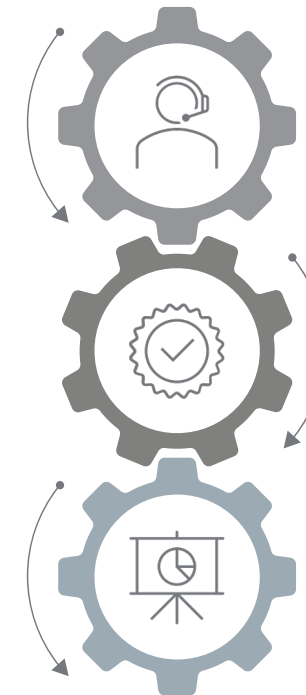
Marketing

Recommendations report: most recommended products for accounts. Plan 1:1 marketing activities for selected customers based on CRM Plugin suggestions

Automate Cases Product

Make customer support a revenue center

Collaborative issue resolution, upsell/cross-sell recommendations, real-time marketing integration for discounts and upgrades



Customer service

Efficient staff training, case suggestions, streamlined workflow, instant solutions, improved customer experience, advanced NLP and AI mining

Better customer insights

Actionable reports, insights for improvements, increased productivity, savings, dedicated support approach

Intelligent Process Design with AI Elements

Services

Discover Need and Benefits



Define AI for CRM Operations

- AI maturity check for data
- Technology-enabled process discovery
- Value assessment and business case creation
- Technology roadmap

Enable CRM based AI



Enable Customer Centric AI

- AI and Automation
- Change Management
- Digital enablement services
- Implementation and Operation at Scale
- Pre-built platforms and solutions
- AI engineering lifecycle
- Open AI based solution design and approach

Innovate AI

- AI Labs

Utilization



Responsible AI

- Portfolio maturity and risk assessment
- Technology assessment and implementation
- Model validation services
- Governance and process standardization
- AI based security for the data. No data stored for AI logic

Our Offerings

Sentiment Analysis

Judge customer sentiment with the case content for better customer success

Company Evaluation

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Large Document Analysis

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THANK YOU



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Business Services

Pune, India

Delivery

