



Case Study: **Streamlining Sales Operations and Lead Management with Integrated Technologies**

Twopir provided Salesforce customization services to help the client develop a robust and an efficient [third party integration](#) along with helping for [Lead Management and Sales Operations](#)

Tech Stack for Project Success



Clearbit



stripe



About the client

Our client is leading provider of SMS texting B2B platform that offers a variety of features to help businesses communicate with their customers and employees more effectively. It allows businesses to send and receive text messages through a shared inbox, which can be accessed by multiple team members. also integrates with a number of popular business apps, such as Salesforce and HubSpot, Chilipiper which can help businesses streamline their workflows.

Twopir offers expert guidance and implements tailored solutions leveraging platforms like Chili Piper, HubSpot, Clearbit, G2, Zapier, and Apex triggers to enhance CRM efficiency. Our services include optimizing lead distribution, automating appointment scheduling, integrating data between systems, and streamlining workflows. Through our comprehensive approach, we ensure improved productivity, data accuracy, customer satisfaction, and sales performance for our clients.

Optimizing Data Flow Between HubSpot and Salesforce

🎯 Challenge : Automating HubSpot-Salesforce Sync for Enhanced Accuracy and Visibility

Client wants to sync data between HubSpot and Salesforce to replace manual data entry processes. This manual entry leads to inconsistencies and limits visibility. They require automated data integration to ensure accurate record synchronization

🔧 Solution : Streamlining Business Operations Comprehensive Data Integration Solution

We implemented a robust data integration solution:

- Data Mapping: Identified key fields and created mappings between HubSpot and Salesforce.
- Sync Settings: Defined bidirectional sync with periodic updates for consistency.
- Error Handling: Developed mechanisms to identify and resolve sync errors promptly.
- HubSpot Automations: Leveraged HubSpot's features for automated workflows based on Salesforce data.
- Campaign Tracking: Utilized HubSpot's campaign tracking for performance insights.



Optimizing Lead Management and Sales Processes

🎯 Challenge : Challenges in Inefficient Lead Management

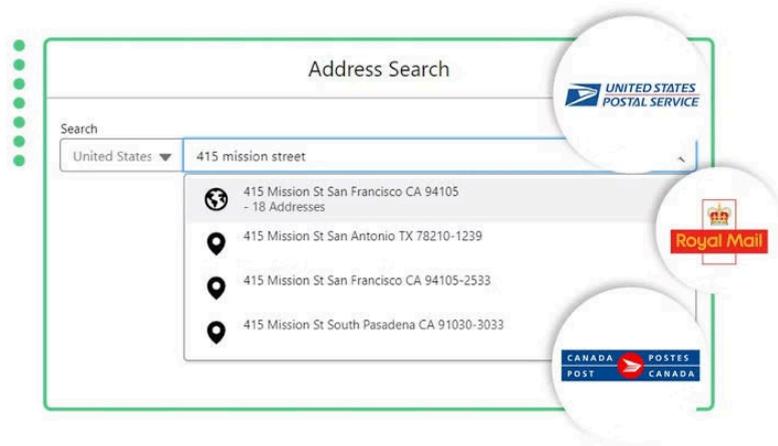
The manual process of capturing and managing leads from various sources led to missed opportunities and duplicated efforts

🔧 Solution : Enhancing Lead Management Efficiency in Salesforce through Automated Routing

Automated Salesforce lead capture and routing, with customized reports and dashboards for real-time sales insights and enhanced visibility into pipeline and representative productivity.



Enhancing Real Estate Operations with Royal Mail Integration



🎯 Challenge : Challenges in Address Verification And Client Communication

Manual address verification led to errors and inefficiencies. The lack of integration between mailing processes and Salesforce CRM caused disjointed workflows, challenges in maintaining client records, and hindered effective client communication, impacting the agency's reputation.

🔧 Solution : Enhancing Address Management and Communication with Royal Mail Integration

Integrated Royal Mail services into their Salesforce CRM platform, revolutionizing their address management and communication strategies. This integration provided automation for address verification, and elevating client communication standards.

Customer Information Form (CIF) Management

🎯 Challenge: Organizing diverse contact information across multiple accounts and agencies is a daunting challenge for real estate agencies.

Real estate agencies deal with numerous contacts associated with various accounts and agencies. Managing and organizing this information efficiently can be daunting, especially considering the diverse nature of clients and stakeholders involved.

🔧 Solution: Streamlining Contact and Account Organization with CIF Management

We simplify the creation of CIF records by developing a custom form within Salesforce. Agents can input client details such as contact information, preferences, and requirements into the form. The data is automatically saved and used to generate CIF records in Salesforce, eliminating manual data entry and reducing the risk of errors.

CUSTOMER INFORMATION FILE



Document Generation and Signing Automation

Document Generation in
Salesforce with **NINTEX** DocGen



PandaDoc
eSignatures



🎯 Challenge : Document Generation and Signing Challenges for Efficient Deal Closure

Challenges with manual document generation and signing processes caused inefficiencies, deal closure delays, and difficulties in tracking document progress. Visibility into document status and approval was lacking, leading to prolonged processes and increased error risks.

🔧 Solution : Automating Document Generation and Signing in Salesforce

1. We automated document generation by integrating Nintex with Salesforce. This eliminated the need for manual data entry, ensuring accuracy and expediting the process.
2. We streamlined document signing by integrating PandaDoc with Salesforce. Agents could send documents for electronic signature directly from Salesforce, track document statuses in real-time, and receive notifications upon completion.

Contract and Offer Management

🎯 Challenge : Challenges in Mitigating Risks in Transaction Documentation and In Offer Management and Communication for Agents and Clients.

Challenges include heightened risks due to ineffective contract management, leading to miscommunication and errors in formalizing agreements. Agents also face difficulties in tracking offer details, maintaining communication with clients, and coordinating negotiations efficiently, while clients struggle with offer management.

🔧 Solution : Enhancing Transaction Efficiency with Automated Contract and Offer Management

We automated contract contact role generation upon contract creation and implemented email notifications at key stages.

And with the Offer object in Salesforce, we capture essential offer details and streamline negotiation processes using customized record types. Using Salesforce Flow, we automate offer-related tasks and notifications for timely follow-ups. Integration with a file management system simplifies document management.



AML (Anti-Money Laundering) Management



Challenge : AML Module Optimization and Digitization

The client already had an AML module in place, but it required optimization and digitization. Previously, the AML process was outdated, lacking an approval process and leaving compliance gaps in property transactions

Solution : Optimized Salesforce AML system with automated processes

We improved their Salesforce AML system by automating processes with custom buttons, setting up AML scoring based on specific KYC parameters, and linking AML record creation to transaction currencies for precise risk assessments. We integrated automated transaction monitoring and enhanced customer identification by verifying identities through trusted sources, including government-issued IDs. Validation rules were implemented to ensure AML checks are completed before transactions proceed, and automation triggers streamlined AML status updates and notifications for efficient compliance with internal policies and regulations.

Closing Commission Management

🎯 Challenge : Commission Management Challenges : Transparency, Reporting, Forecasting, Compliance, Broker Performance, and Sales Strategy Clarity.

Clients faced challenges in closing deals due to inadequate commission management in Salesforce, resulting in transparency issues, reporting difficulties, inaccurate forecasting, disputes, and compliance risks for real estate agents.

🔧 Solution : Streamlined closing commission management with transparent insights, automated generation, and centralized tracking for efficiency and data integrity.

We developed a comprehensive closing commission module for external and resale broker agents, providing transparent insights into commission frameworks and automating commission generation upon contract verification within Salesforce. This solution ensures meticulous tracking of commission details and offers centralized management, enhancing transparency and efficiency while maintaining data integrity through validation rules and automation.



Results



Efficiency Increase

Streamlined sales processes and decision-making, resulting in a 70% increase in efficiency.

Productivity Boost

Achieved 80% Improvement in Data Accuracy and productivity

Integration Efficiency

Enhancing Workflow and Communication through System Integration

Speed Enhancement

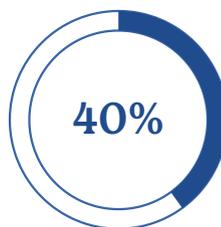
Accelerated deal closures and compliance by 40%

Results



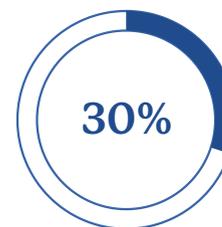
Efficiency Increase

Automated provisioning slashed errors, sped up onboarding by 35%.



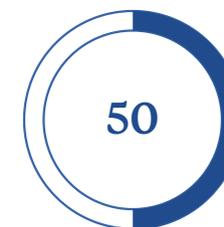
Productivity Boost

Streamlined workflow led to 40% productivity boost; automated system rapidly scaled, creating thousands of subscribers effortlessly.



Integration Efficiency

Sophisticated integration boosted efficiency by 30% with seamless connectivity to billing, CRM, and network management systems.



Speed Enhancement

Advanced methods led to 50% faster subscriber provisioning, enhancing service delivery for increased customer satisfaction and loyalty.

Our Partners

We are esteemed partners of best AppExchange products. This provides us an edge and access to partner ecosystem that are designed to support and help customers in their complex business needs.

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sync cirrus insight gridbuddy Chargent
PAYMENT PROCESSING FOR SALESFORCE wm
webmerge Active
Campaign > 123 FORM
BUILDER S
DRIVE blackthorn FORM
ASSEMBLY

Testimonials



Vincent Croser

-Vice President, Sales & Marketing

Twopir Consulting is a hardworking company, exceptionally knowledgeable, and always willing to go the extra mile to support me. Their communication is top-notch, and they consistently deliver on time and within budget. I couldn't be more impressed. Their ability to solve complex challenges while maintaining a high level of professionalism truly sets them apart. Whether it's handling intricate technical issues or providing strategic guidance, Twopir Consulting exceeds expectations every time. I highly recommend them to anyone looking for a reliable and skilled partner.



Benedict Texeira

-Chief Operating Officer

Twopir Consulting played a crucial role in customizing our Salesforce CRM. They managed the project effectively, keeping us informed and ensuring that all milestones were achieved on time. Their expertise in Salesforce allowed them to tailor the CRM to our specific real estate needs, resulting in a highly functional and efficient system. Twopir Consulting ensured smooth data flow and promptly resolved any issues that arose.



Mary H. Lex

- Senior Marketing Executive

Upon meeting the team, I checked references and received high praise. With extensive Salesforce experience, I confidently affirm Twopir Consulting's excellence. They swiftly crafted a custom automation workflow, despite vague specifications. Working tirelessly, they ensured project success and provided invaluable assistance. Their expertise in configuring and optimizing Salesforce has significantly improved our automation and customer relationship management processes. Trust your project to the team for exceptional results.



For more information, contact support@twopirconsulting.com

Thank you for your interest in TwoPir Consulting Pvt Ltd. To learn more about our services and how we can elevate your Salesforce experience, please get in touch with our team. We are here to answer any questions you may have and provide tailored solutions to meet your unique business needs. Reach out to us today!

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Call us : **+917420894628**

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