

# Salesforce Admin Case Study

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### **Our Client Overview**

#### 1. Customer Data Management

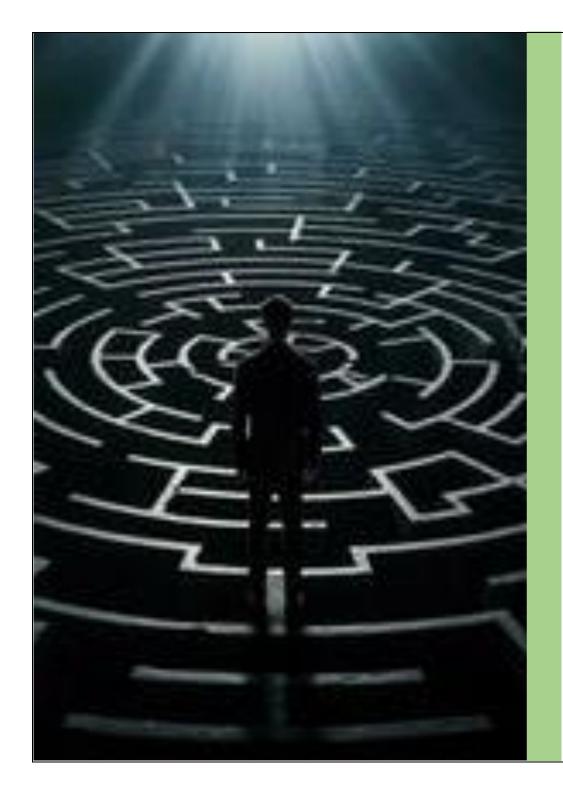
- Unified Customer View
- Data Cleansing & Duplication
- Customer Segmentation

#### 2. Automating Sales Processes

- Lead and Opportunity Management
- Nurture Campaigns
- Order Management Integration

#### 3. Real-time Reporting

- Customizable Dashboards
- Scheduled Reports.
- Al-Driven Insights



# **Challenges**

#### 1. Manual Data Entry

- Data Automation
- Integration with Other Systems.
- Mobile Data Entry

#### 1. Lack of Centralized Customer Insights

- 360-Degree Customer View
- Customer Analytics
- Customer Segmentation

#### 2. Inconsistent Sales Reporting

- Standardized Reporting Templates
- Automated Report Generation
- Sales Pipeline Visibility



## **Solution Implemented**

As a Salesforce Administrator, I implemented a structured Salesforce solution to streamline their processes. Key actions included:

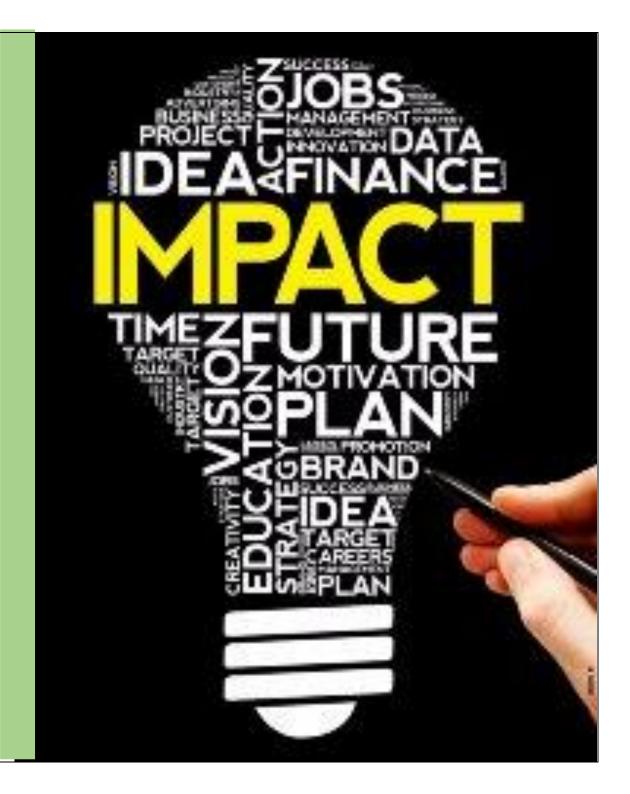
- Configured Role Hierarchies & Permission
   Sets to ensure secure data access.
- Implemented Lead & Opportunity

  Management for better sales tracking.
- Automated workflows using Process Builder
   & Flows to reduce manual tasks.
- Created Custom Reports & Dashboards for real-time business insights.
- Integrated Email-to-Case & Web-to-Case for seamless customer service.

## **Results & Impact**

After implementing Salesforce, the company saw significant improvements:

- 30% increase in lead conversion due to automated follow-ups.
- 50% reduction in manual data entry by automating repetitive tasks.
- Improved sales forecasting with accurate real-time reports.
- Faster response times for customer inquiries, leading to higher satisfaction.



# **Conclusion**

By leveraging Salesforce's powerful administration capabilities, the company enhanced productivity, improved sales efficiency, and achieved better customer engagement. This case study demonstrates how a well-optimized Salesforce instance can drive business success.

