

Grow Your Business Through Salesforce with Tether

Operational Efficiency: AIA's Journey with Salesforce and Tether

The Challenge

AIA Loss Assessors Limited faced a critical disconnect between their operational needs and the capabilities of the software solutions they had evaluated, including **Salesforce**. The platform, in its standard form, did not align with the unique workflows and demands of managing insurance claims for residential and commercial properties. This misalignment created inefficiencies and limited the team's ability to scale or respond quickly during high-demand periods. Manual processes dominated key areas such as revenue forecasting and claims tracking, making it difficult to gain real-time insights or streamline decision-making. Additionally, administrative burdens were weighing down staff productivity, and previous solution providers had failed to demonstrate a clear understanding of AIA's business model or offer a tailored approach that could truly support their operations.

The Solution

AIA partnered with Tether for a three-month implementation of **Salesforce Service Cloud**, Digital Engagement, and PDF Butler. Tether delivered a tailored proof of concept that aligned Salesforce with AIA's business processes.

Through deep-dive workshops and close collaboration Tether helped by:

- Streamlining operations
- Reducing administrative burdens
- Ensuring smooth adoption across the team

The Outcome

- **Resilient Operations During Crisis:** Just two weeks post-implementation, AIA successfully managed a surge in claims following a severe storm, thanks to Salesforce's scalability and visibility.
- **Real-Time Insights and Decision-Making:** The team could now track new claims, identify bottlenecks, monitor pending documents, and manage outstanding invoices with ease.
- **Accurate Revenue Forecasting:** Previously hindered by manual processes, AIA can now forecast revenue with confidence using real-time data.
- **Ongoing Support and Confidence:** Tether's hands-on support during a critical period ensured AIA could fully leverage Salesforce, setting the stage for long-term operational efficiency.

