

CO / RESOLUTE

salesforce.org

CONSULTING
PARTNER

(4.8/5.0)

CoResolute

**Solving CRM Challenges,
Powering GTM Efficiency,
Uncovering Growth Possibilities**



Problems Our Clients Ask Us To Solve



CRM Performance

Is our **CRM working** efficiently?



GTM Optimization

Why is our **GTM process** so manual and disorganized?



Maintenance

Our maintenance and project **backlog** is out of hand.



Data Issues

Why is our data so **scattered & inaccurate?**



Integrations

Why do our systems not **integrate smoothly**, causing inefficiencies and errors?



AI & Automation

How can we identify the use cases and experiments that will **benefit from AI?**



Scaling

Why do our **systems and processes** break down as we scale?



Implementations

Where do I start my CRM journey, and how do I maximize this investment?

About CoResolute



Austin, TX-based CRM & Technology company with 40+ 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 Services



Implementations & Risk-Free Migrations

supporting required functions, work motions, and data collection

Summarization

Large text summaries for concise context and action

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



Workflow Efficiency with Agentic AI

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 reasoning



How To Work with Us

Short/Long Term Bespoke Projects

Buyer journey mapping, strategy, implementation, integration, M&A, data migration, application additions, 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 **25** 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 Business Transformation and **GTM Process Optimization**
- Revenue and operating leadership experience across multiple verticals
- Respected thought leader and serial entrepreneur



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

- **15+** years streamlining and automating CRM operations
- Managed **10+** enterprise-scale **CRM implementations**
- Proficient in customer success and bespoke **application optimization**
- Strategic technical consulting & product development
- Expert in project management and customer success
- Achieved **\$100M** in **client project savings**



Case Study:

Streamline Customer Support Operations for Retail Debt settlement & Consolidation Financial Mid-Market



The Challenge:

Our client, Century Consulting Services, optimizes and plans debt services for retail customers across multiple brands. Its support operations were manual and managed through various siloed systems that required consolidation for streamlined customer support via a unified platform.



The Solution

Implemented Salesforce Service Cloud to help with unified customer support operations.

Integrated with external applications (CreditPulse, Moneylion for customer score and related offerings).

Handled customer support through emails, webforms, and direct calls.

Automation to manage lead to customer journey and case taxonomy with proper routing & training.



The Optimization

Identified the 20 top issues that created 80+ percent of the cases.

Created specific workflows and automation to reduce response and resolution times.

Integrate with Sales Cloud processes to provide a 365 customer profile.



Why This Worked

Service Cloud provides extensive capabilities for case management. With the right data model and case taxonomy, we were able to collaborate closely with the customer team to enhance service levels.

Auto routing, SLA management, knowledge management, and ease of configuration and integration to meet customer needs needs.

Better change management and knowledge handling for customers.

100%

Cases handled through Salesforce

51%

Improvement in managing customer response times

10 GB+

Data managed through files for knowledge processing & automation

Case Study:

Manage & Improvise Customer Service Operations for Singapore Based Fintech Enterprise

The Challenge:

The SGX company needed to manage & improve customer support operations regularly implemented using Salesforce Service Cloud. In parallel, legacy applications needed to sunset.



The Solution

Automate case management with Service Cloud.

Handle changes based on processes and products. Sunset legacy forms-based tools for case handling.

Manage reports and dashboards across different support metrics for business stakeholders.

Manage trainings for process improvements to the users.



The Result

The SFDC Customer Service Cloud application helped manage customer cases at higher volumes.

Managing support operations across different time zones.

Automation, flows, case routing, case reporting helped Maxx manage customer support and maintain a high degree of satisfaction.



A Singapore Exchange (SGX) Company

2000+

Support requests are handled monthly

43% \$ savings

Through sunsetting legacy applications

30% improvement

Customer issue response times



Case Study:

Enhance Loan & Insurance Servicing Customer Experience while Onboarding Vendors and Partners for Better Collaboration

The Challenge:

The company wanted to manage customer, vendors and partner operations through a single platform. Sunset old systems & integrate ERP, other systems system to get right info at right time.



The Solution

Case Management: Automate support with email, integration, and SMS-based case automation. Separate vendor portal for external users. Reports & Dashboards.

Automation: Develop automated customer service workflows for improved case management

Integration: Seamless case management with integrated Outlook, Twilio, Azure, and portal

Portals: Partner & customer portals for real-time external collaboration.



The Result

Handling customer operations through a single platform helps manage and maintain real-time insights into customer operations.

AI-based case sentiment analysis was implemented to obtain real-time insights on customer sentiment for proper case routing.

Appropriate process training and content provided to business users for system adoption.

80%

Less manual tasks with legacy systems sunset

50%

Faster case resolution & automated assignments

90%+ CSAT

With SLA, knowledge, and automation

Case Study:

Automate Reap & Replace processes for Leads & Accounts through Custom Dynamic Booking Engine in Salesforce



The Challenge:

Sales teams frequently encounter inefficiencies in managing high-potential accounts, resulting in missed opportunities and lost revenue. Customers require a comprehensive solution to handle account qualification and allocation, manage workloads, and prevent revenue leakage.



The Solution

The Dynamic Bookings Engine built on Salesforce automates account assignments through a Reap & Replace process.

This guarantees optimal prioritization and load balancing for sales representatives, enhancing efficiency and engagement.



The Process

How it works



Marketing Nurture Queue:
Gathers warm prospects.



Sales Ready Queue:
Houses high-priority accounts.



Reap Process:
Removes underperforming accounts.



Replace Process:
Injects high-scoring accounts.



Dashboards & Reports:
Provides actionable insights.

45%

Increased pipeline efficiency

55%

Reduction in idle accounts

30%

Increase representative productivity with optimal accounts to manage

Case Study:

Transforming the Customer Onboarding Process for Insurance & Wealth Management Operations using CRM



The Challenge:

Unify insurance support and customer experience using MS Dynamics 365 for the fourth-largest Texas-based credit union. Transition customer operations from Salesforce CRM to MS Dynamics CRM, considering client expectations to consolidate to a unified Microsoft stack.



The Solution

Centralize all necessary information and streamline operations to respond faster and more efficiently to client needs and regulation requirements.

Automate customer onboarding processes with data deduplication options.

Develop a web application to automate data and process management for support agents

Omnichannel: Email, website or partner channel delivery across channels.



The Result

Transforming customer onboarding operations involves managing pain points, maintaining a 360-degree view, integrating systems, and handling data deduplication.

Managing customer data in accordance with GDPR and related guidelines ensures data security.

Change management, ease of use, and improved UX are key to ensuring system adoption.

70%

Customers information made available for a 360-degree view

3x

Faster appointment scheduling for products overview

95%+

Cases resolved within defined SLAs

Intelligent Process Design with Agentic AI & Automation

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

- Team focused on building AI Services

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

Working Builds

Dynamic Bookings Engine

Automate Sales Queue Management to maximize GTM efficiency

Company Evaluation

Evaluate health of a company with predefined global parameters

Large Document Analysis

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

Smart Lead Scoring

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

Email Case Deflection

As cases come in, personalized and AI-driven response to the customer

Audio to Text

Get automated text conversion for calls in 50 languages



Building AI Agents for Client Use Cases

Intelligent Lead Scoring Agent

The screenshot displays the Salesforce CRM interface for a lead named Zyndall Anderson. The AI agent, Agentforce, is visible in the bottom right corner, providing assistance with lead scoring. The lead's details, including company (Bedrock), title (Partner), and contact information, are shown. The agent's interface includes a search bar, a list of activities, and a chat window where the user can interact with the AI. The agent's response includes a lead score of 10 and a recommendation to update the score.

Upsell/Cross-Sell Agent

The screenshot displays the Salesforce CRM interface for an opportunity named Oppt12. The AI agent, Agentforce, is visible in the bottom right corner, providing recommendations for upsell and cross-sell products. The agent's interface includes a search bar, a list of products, and a chat window where the user can interact with the AI. The agent's response includes a list of products (Gearbox, Energy Meter, Hydraulic Unit, Installation Services, Large Turbine, Mounting System) and a recommendation to cross-sell products like Remote Monitoring Subscription, Maintenance Contract, and Small Turbine.

Detailed Account & Case Analysis Agent

The screenshot displays the Salesforce CRM interface for an account named Southern Solutions. The AI agent, Agentforce, is visible in the bottom right corner, providing detailed account and case analysis. The agent's interface includes a search bar, a list of account details, and a chat window where the user can interact with the AI. The agent's response includes an account overview, opportunities, and open cases.

Case & Communication Sentiment Agent

The screenshot displays the Salesforce CRM interface for a list of cases. The AI agent, Agentforce, is visible in the bottom right corner, providing sentiment analysis for the cases. The agent's interface includes a search bar, a list of cases, and a chat window where the user can interact with the AI. The agent's response includes a list of cases and a recommendation to retrieve cases with negative sentiment.

THANK YOU



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Delivery

