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Salesforce Business Transformation

PRESENTATION

Agentforce, Revenue Cloud Advanced & Loan Automation

- Hero FinCorp loan automation with Agentforce
 - Bike Bazaar financing transformation
- Revenue Lifecycle Management using Revenue Cloud Advanced
 - Business outcomes and strategic benefits



Hero FinCorp – Business Challenge



- Manual loan processing with 100+ touchpoints
- Average approval time: 2 days
- Heavy dependency on multiple teams and workflows
- Peak-season backlog reached up to 12 days
- Delayed dealer payouts impacted customer acquisition

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Hero FinCorp – Salesforce Solution



- Implemented Agentforce for end-to-end loan automation
- Integrated Sales Cloud, Experience Cloud, and MuleSoft
 - Automated KYC, PAN, Aadhaar, and credit checks
 - Enabled Intelligent Document Processing
- Automated e-signature and loan disbursement workflows





Hero FinCorp – Key Results



- Loan processing reduced from 2 days to 30 minutes
 - 80% improvement in turnaround time
 - 75% fewer manual handoffs
 - 37% reduction in form errors
- Zero backlog expected during peak seasons

Bike Bazaar – Business Challenge

- Legacy LOS system lacked scalability and flexibility
 - Needed support for metro and rural markets
 - Frequent product launches were difficult to manage
- Customer trust required personalized loan journeys
- Approval workflows were slow and fragmented





Bike Bazaar – Salesforce Solution

- Sales Cloud integrated with custom mobile app
 - Automated PAN, Aadhaar, and KYC verifications
 - Workflow-driven loan routing and approvals
- Centralized data and streamlined underwriting
 - Enabled faster feature and product rollouts



Bike Bazaar – Key Results



- Loan approvals reduced from 20 minutes to 5 minutes
 - Operational capacity doubled
 - Faster customer response times
 - Improved dealer targeting using analytics
- Enhanced risk management and market expansion decisions

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- The client, a US-based industrial manufacturer, produces custom-engineered components for the automotive and heavy machinery sectors.
- Their product catalog is vast, their sales cycles complex, and their revenue streams increasingly diverse, ranging from fixed-price equipment to subscription-based maintenance, usage-billed IoT services, and milestone-based project contracts.
- With operations spanning multiple markets, they wanted to bring all revenue processes, quoting, billing, renewals, and compliance onto a unified platform.
- Their primary goals: eliminate inefficiencies, gain full visibility into revenue flow, and create a foundation that could scale alongside newer business models.



Revenue Cloud Advanced – Challenges

- Disconnected CPQ, billing, and contract systems
- Complex subscription and usage-based revenue models
- Manual contract amendments and billing adjustments
- Limited consumption forecasting capabilities
- Revenue recognition and audit compliance risks



Revenue Cloud Advanced – Implemented Solutions

- Unified revenue lifecycle on Salesforce Revenue Cloud Advanced
- Advanced pricing procedures and guided configuration
- Integrated Contract Lifecycle Management (CLM)
- Dynamic Revenue Orchestration for fulfillment automation
- AI-powered quoting with Agentforce integration



Revenue Cloud Advanced – Business Benefits

- Eliminated operational silos
- Reduced fulfillment delays
- Improved subscription and usage tracking
- Automated compliance and revenue recognition
- Enhanced customer experience with seamless renewals



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RCA

Overall Business Impact



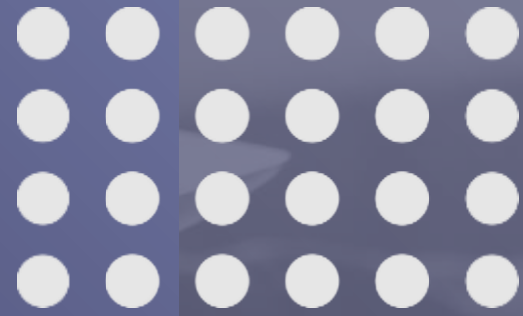
- Accelerated digital transformation
- Improved operational efficiency and scalability
- Reduced manual effort and processing delays
- Enabled AI-driven automation and analytics
 - Delivered better customer and dealer experiences



Conclusion



- Salesforce solutions transformed financial operations
 - Agentforce enabled intelligent automation at scale
- Revenue Cloud Advanced streamlined end-to-end revenue management
- Organizations achieved faster approvals, higher productivity, and stronger customer satisfaction



Thank
YOU

