

Streamlining Operations and Enhancing Customer Experience for a Global Industrial Manufacturer and Supplier

Duration - 2 Year
Team Member - 2

This case study focuses on a global industrial manufacturer and supplier headquartered in Kansas City USA, specializing in providing comprehensive solutions to protect people and critical assets from hazards such as fire, explosion, and over-pressurization. The company faced various challenges related to operational efficiency and customer experience, which prompted them to seek our expertise in implementing Salesforce Sales Cloud, Experience Cloud (formerly Community Cloud), and Field Service Lightning

Objectives:

1. Streamline their sales processes and improve sales team productivity.
2. Enhance customer engagement and self-service capabilities through a robust community platform.
3. Optimize their field service operations to improve response times and customer satisfaction.

Implementation:

1. Conducting a detailed analysis of existing systems, processes, and pain points.
2. Designing and configuring Salesforce solutions tailored to the client's specific requirements.
3. Collaborating with the client's IT team to ensure a seamless integration with legacy systems.
4. Conducting extensive user training and change management to drive adoption.

Solution

Salesforce Sales Cloud

- Customized to align with unique sales processes.
- Integrated with existing systems for a holistic view.

Experience Cloud

- Developed comprehensive community platform.
- Enabled self-service capabilities and support features.

Field Service Lightning

- Optimized scheduling, dispatching
- Real-time communication.

Results

Improved Sales Efficiency

- 30% increase in productivity.
- Enhanced visibility and accurate forecasting.

Enhanced Customer Experience

- 25% reduction in support calls.
- Self-service capabilities and peer-to-peer support.

Optimized Field Service Operations

- 20% reduction in response times.
- Real-time access to job details and improved customer satisfaction.

Transforming Customer Engagement for Louisiana Workers' Compensation Corporation

Duration - 2 Year
Team Member - 7

This case study showcases a private, nonprofit mutual insurance and worker compensation company based in the USA. With a focus on serving the unique needs of Louisiana businesses, the company has been providing comprehensive insurance services since 1992. This included a consolidated view of customer data, encompassing basic contact information, policy history, and interactions with customer service. Our team utilized Salesforce Industry (Vlocity), Experience Cloud (Community), and Synatic as an Oracle to Salesforce integrator to address these requirements.

Objectives:

1. Achieve a comprehensive 360-degree view of customer data.
2. Consolidate customer information for improved engagement.
3. Streamline customer interactions and support processes.

Implementation:

1. Customized Salesforce Industry (Vlocity) to align with insurance needs.
2. Configured user-friendly interface and integrated customer service functionalities.
3. Integrated Synatic as an Oracle to Salesforce integrator.
4. Close collaboration with stakeholders throughout the implementation.

Solution

Salesforce Industry (Vlocity)

- Tailored platform for insurance industry.
- Streamlined policy management and claims processing.

Experience Cloud

- Developed a comprehensive customer engagement portal.
- User-friendly interface for policy access, inquiries, and claim tracking.

Synatic Integration

- Utilized Synatic for seamless data integration.
- Automated real-time data syncing.

Results

Extensive Customer View

- Consolidated customer data with contact info, policy details, and interaction history.
- Personalized interactions and efficient issue resolution.

Enhanced Customer Engagement

- Self-service capabilities for policy access and claim tracking.
- Improved response times and customer satisfaction.

Improved Operational Efficiency

- Streamlined processes reduced manual effort.
- Real-time data accuracy and consistency.

Empowering Unforgettable African Journeys with Safari365 Salesforce Implementation

Duration - 4 Month

Team Member - 2

This case study showcases Safari365, a passionate African travel company dedicated to sharing the wonders of Africa with the world. With over 15 years of experience, Safari365 has been curating unforgettable journeys throughout the African continent. To enhance their operations and deliver exceptional customer experiences, Safari365 partnered with our firm to implement Salesforce Sales Cloud and execute extensive custom development, including a unique custom component for invoice generation using Salesforce data in Google Spreadsheets and integration with Google Drive.

Objectives:

1. Automate and streamline the manual and time-consuming invoice generation process.
2. Implement a system for efficient file management related to client itineraries, bookings, and other travel-related information.
3. Enable Seamless Data Integration and Enhance Customer Experiences

Implementation:

1. Alignment of Salesforce Sales Cloud with travel industry requirements.
2. Development of custom invoice generation component using Google Spreadsheets.
3. Seamless integration of Salesforce with Google Spreadsheets and Drive.
4. Close collaboration between Safari365 stakeholders and consulting team

Solution

Salesforce Sales Cloud

- Customization for unique travel industry requirements.
- Lead and opportunity management, accurate tracking and forecasting.

Custom Invoice Generation

- Salesforce component for dynamic invoice generation.
- Integration with Google Spreadsheets API for invoice data population.

Google Drive Integration

- Integration with Salesforce for easy access, storage, and sharing.
- File organization structures and permissions for secure management.

Results

Efficient Invoice Generation

- Reduced manual effort and eliminated errors.
- Faster invoice processing and improved customer satisfaction.

Efficient File Management

- Easy access, collaboration, and real-time updates in Google Drive.
- Improved productivity, coordination, and data confidentiality.

Seamless Data Integration

- Efficient data transfer and processing between Salesforce orgs.
- Improved operational efficiency and data consistency.

Streamlining Quote-to-Invoice Process and Data Integration for a Leading Global Insurance Company

Duration - 1.5 Year
Team Member - 5

This case study showcases a leading insurance company based in the USA, offering worldwide insurance protection in over 160 countries. The client sought an integration provider to establish Salesforce as their single source of truth and seamlessly integrate data across multiple solutions. Our team implemented Salesforce Sales Cloud, Service Cloud, and Industry (Vlocity) Cloud to address their unique requirements.

Objectives:

1. Diverse product range with unique quote creation processes.
2. Varied calculations for quote, binder, and invoice documents.
3. Customized Quote-to-Invoice Automation.
4. Customized view and data export capabilities.

Implementation:

1. Thorough analysis of existing systems and workflows.
2. Customization of Salesforce clouds to meet unique requirements.
3. Development of automated quote-to-invoice solution.
4. Configuration of customized data views and export functionality.

Solution

Salesforce Implementation

- Leveraged Sales, Service, and Industry (Vlocity) Clouds.
- Configured workflows, processes, and data models.

Quote-to-Invoice Process

- Developed custom solution for different product requirements.
- Tailored calculations for quotes, binders, and invoices.

Customized Data View

- Configured personalized data views in Salesforce.
- Developed custom reports and dashboards.

Results

Effective Invoice Process

- Automated process reduced manual effort.
- Faster quote generation, improved customer service, and operational efficiency.

Centralized Data Management

- Salesforce as single source of truth.
- Consolidated view of customer data, policies, and transactions.

Personalized Data Visualization

- Customized data views, reports, and dashboards.
- Export functionality for further analysis and reporting.