



# Salesforce Practice

## AI-Powered Transformation



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# **Key Customer Success Stories**

# Healthcare Provider - Transforming Patient Services

## Challenges:

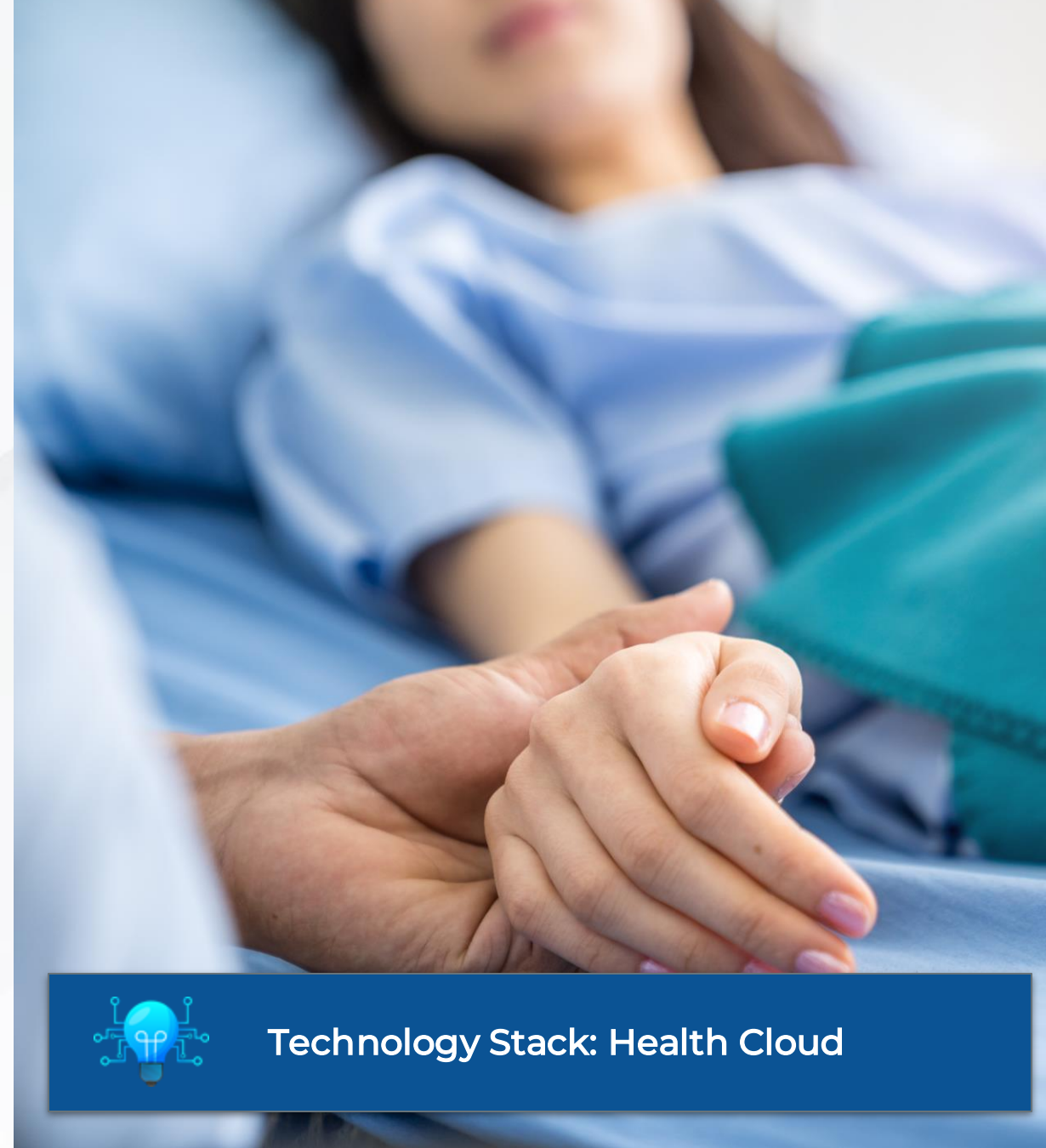
- **Disjointed Patient Data** – No unified patient view for seamless care.
- **Slow Case Resolution** – Manual workflows causing delays.
- **Inefficient Processes** – Tedious eligibility checks & order fulfillment.
- **Limited Tracking** – No real-time visibility into patient services.
- **Integration Gaps** – Compliance challenges with external systems.

## Objective:

To implement a robust Patient Services platform using Salesforce Health Cloud, enabling seamless patient profile management, automated care workflows, and real-time patient interactions while ensuring compliance with healthcare standards

## Outcome:

- 38% Faster Patient Onboarding with a 360-degree patient view and automated workflows
- 43% Increase in Service Efficiency through automated eligibility checks and benefits verification
- 35% Improvement in Service Resolution time with Salesforce Omni-Channel routing
- FHIR-Compliant Data Exchange ensuring seamless integration with external healthcare system



**Technology Stack: Health Cloud**



# Employee Benefits Provider- Marketing Cloud Implementation

## Challenges:

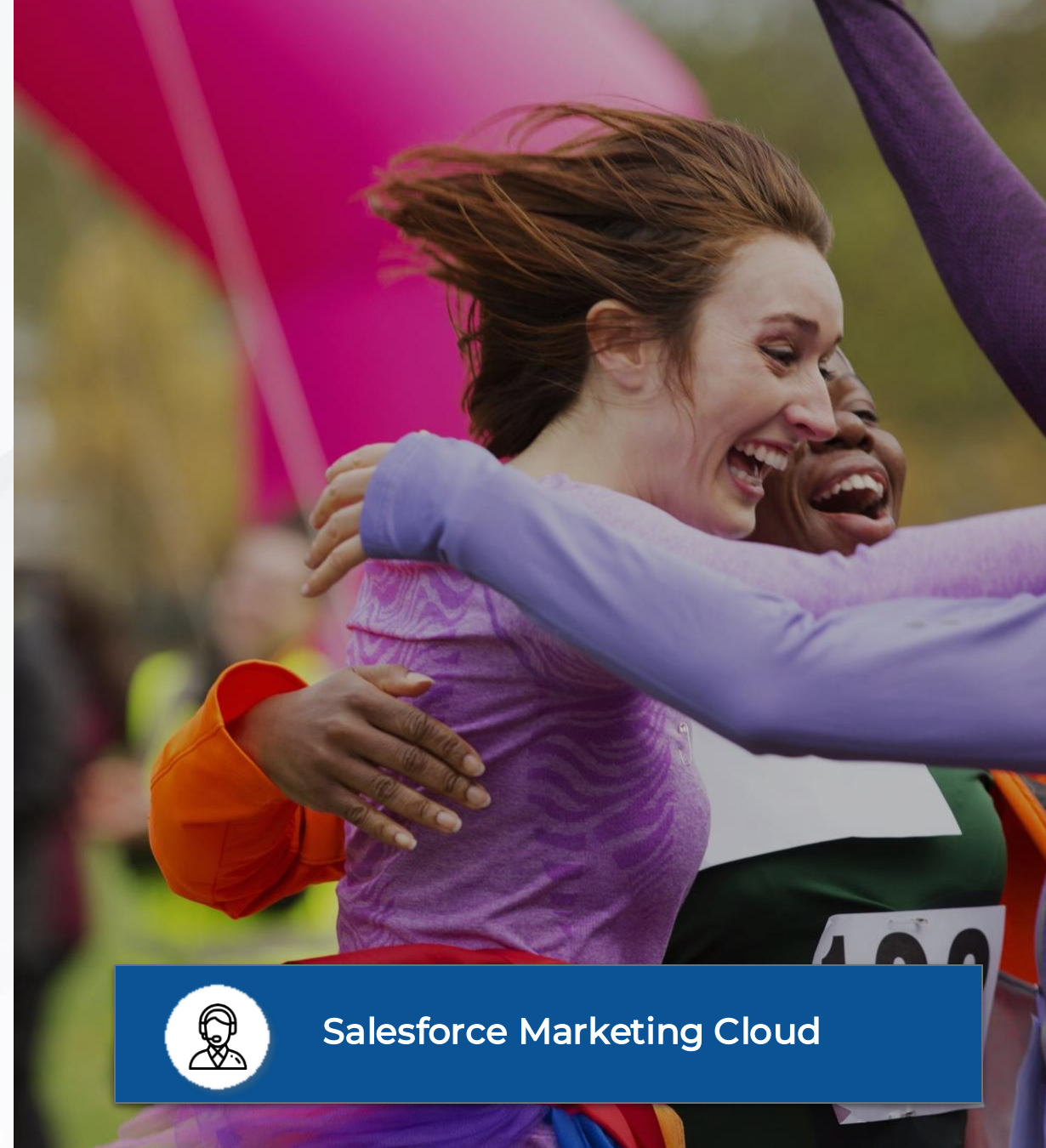
- **Disconnected Systems:** Lack of seamless data transfer between Marketing Cloud and Sales Cloud hindered lead nurturing.
- **Ineffective Lead Scoring:** Manual and inconsistent lead qualification reduced conversion efficiency.
- **Limited Marketing Automation:** Inefficient workflows led to missed engagement opportunities.
- **Low Customer Engagement:** Generic messaging failed to drive meaningful interactions.
- **Limited Insights:** Inadequate reporting restricted campaign optimization and performance tracking.

## Objective:

Integrated and implemented a new SFMC instance, enabling seamless data transfer to Sales Cloud, optimized lead scoring, and enhanced marketing automation for improved customer engagement

## Outcome:

- 35% increase in customer engagement through personalized email experiences
- Enhanced lead qualification, improving conversion rates by 25% with advanced scoring
- 20% boost in marketing efficiency using Mobile Studio's automation and advanced reporting



Salesforce Marketing Cloud

# Leading Computer Hardware Manufacturer - Service Transformation

## Challenges:

- **Manual & Inefficient Case Handling** – Delays in fraud detection and case resolution.
- **Lack of Fraud Prevention** – No proactive system to identify and flag high-risk claims.
- **Disjointed Customer Data** – Limited visibility into customer interactions and service history.

## Objective:

To deploy a Service Management system with automated case assignment, Fraud detection, real-time tracking, and AI-driven prioritization

## Outcome:

- Improved Efficiency – Centralized CRM streamlined service operations and case resolution.
- Enhanced Fraud Detection – AI-powered insights reduced fraudulent claims and minimized revenue loss.
- Cost Savings & Faster Resolution – Automation reduced investigation time, cutting operational costs and boosting customer satisfaction.



Salesforce Service Cloud



# Software Security Product Company - Sales & Service Transformation

## Challenges:

- **Inefficient Lead Handling** – Manual processes delayed response times and impacted conversions.
- **Lack of Real-Time Customer Engagement** – No self-service options for tracking orders or managing accounts.
- **High Support Workload** – Repetitive inquiries overwhelmed customer support teams.

## Objective:

To Implement a Lead Management solution with automation, intelligent scoring, and seamless sales integration, along with a Customer Portal for real-time tracking, self-service, and personalized account management.

## Outcome:

- 58% faster lead response time, ensuring timely engagement
- 30% improvement in order processing efficiency
- 48% reduction in support inquiries through self-service capabilities



**Salesforce Sales, Service, Experience  
Clouds**



# Software Security Product Company - Optimizing Quotes & Pricing with CPQ

## Challenges:

- **Cumbersome CPQ Process** – Highly customized NetSuite instance prone to errors.
- **Manual Dependencies** – High intervention leading to inefficiencies and delays.
- **Lack of Quote Tracking** – Frequent rework with no status visibility.
- **Untracked Discount Approvals** – Revenue loss due to unauthorized discounts.

## Objective:

To streamline and automate the Configure, Price, Quote (CPQ) process, reducing errors, improving efficiency, and enhancing revenue tracking through Salesforce CPQ implementation.

## Outcome:

- 46% Faster and more accurate quoting, reducing rework and revenue loss.
- Streamlined approval processes, ensuring compliance and profitability
- Improvement in address standardization, reducing duplicate entries.



Clouds Used: Sales Cloud & Salesforce CPQ

# Large Merchandise Distribution & Logistics - Service Transformation

## Challenges:

- **Inefficient Case Resolution:** Manual tracking and lack of automation led to delayed case resolutions, affecting customer satisfaction.
- **High Service Costs:** Without predictive maintenance, issues were often resolved reactively, increasing operational costs.
- **Poor Customer Engagement:** Lack of omnichannel support made it difficult to provide a seamless and integrated service experience for customers.

## Objective:

To implement a comprehensive service management system to streamline post-sales service operations, enhance customer support, and optimize service management for products

## Outcome:

- 40% faster case resolution with automated tracking and workflows
- 35% increase in customer satisfaction through seamless omnichannel support
- 30% reduction in service costs with AI-driven predictive maintenance and proactive issue resolution



Salesforce Sales & Service Clouds



# Youth-Focused Organization - Transforming Nonprofit Operations

## Challenges:

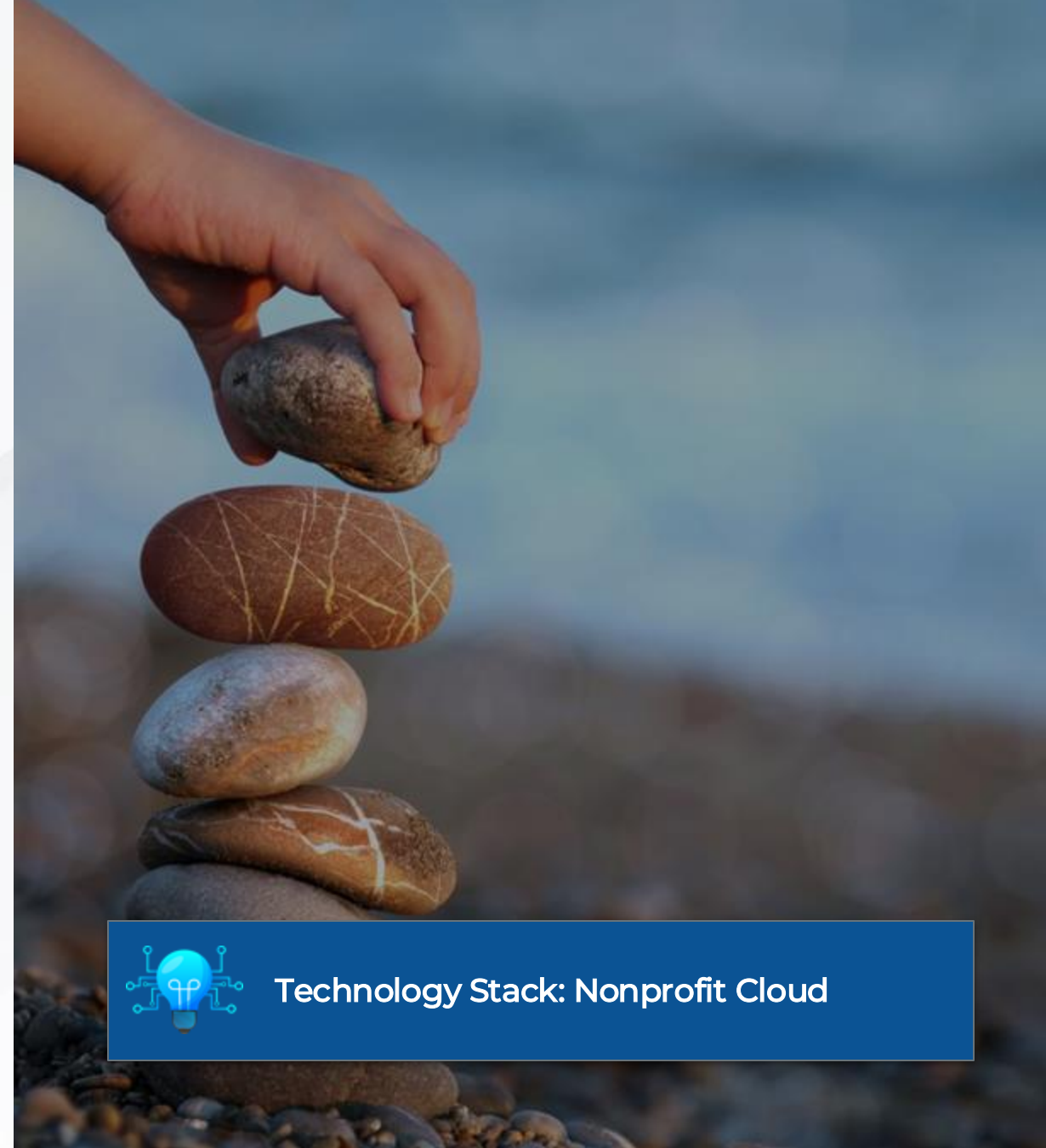
- **Fragmented Donor Data** – Lack of a centralized system for tracking donor interactions.
- **Volunteer Coordination** – Inefficient scheduling and communication processes.
- **Program Visibility** – Limited insights into program impact and engagement.
- **Fundraising Inefficiencies** – Manual processes hindering data-driven decision-making.
- **Engagement Gaps** – Difficulty in personalizing outreach to donors and volunteers.

## Objective:

Implemented Salesforce **Nonprofit Cloud** to streamline donor management, volunteer coordination, and program tracking, enhancing engagement and operational efficiency.

## Outcome:

- 40% increase in donor engagement through automated outreach and personalized interactions
- 33% improvement in volunteer management efficiency with centralized tracking and scheduling
- 25% boost in fundraising effectiveness using data-driven insights and campaign automation



Technology Stack: Nonprofit Cloud



**Thank you**