Case Study

Our Edu-Tech client, wanted to automate their entire sales process across multiple business lines and Go Live in eight weeks for 100+ Users.

Problem Statement

01 Struggle to provide seamless sales and customer onboarding and support process to employees across different locations and business streams(B2B,B2C & B2G) due to the distributed data stored across different systems or flat files.

02 To overcome challenges in syncing their digital presence to real-world sales, employee & company performance processes. In addition, they needed a solution to get a one-stop snapshot of sales and performance figures information through reports and dashboards.

Solution

❯ The implementation helped our client to merge sales, customer onboarding, and support process.

❯ 40+ Processes , 76 Reports and 7 dashboards, Reporting Structure for 60+ users & 6 Integrations with external systems/interfaces

❯ Now the business can gain leads & opportunities, share quotes, create customers, and do the onboaring process.

❯ Further, the business teams can see Leads from external systems, resolve JIRA issues and auto-calculate the company KPIs.

Business Benefits

❯ Improved Lead Management Process

❯ The customer onboarding and Support process are now more straightforward to achieve than ever

❯ The customer support team can see the customer issues & chat raised in JIRA or Haptik in Salesforce itself

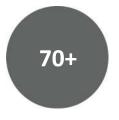❯ Executives can see the company's and employee's performance now in one click Dashboard

40+	5/5 ★★★★★	70+
Clients	AppExchange	Active Projects