

# 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 onboarding 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



50+

Clients

4.9/5



AppExchange

600+

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