A Govt. Owned Investment Platform Achieved 360° View of Its Investors and Improved Team Productivity with Tailored Salesforce Solution

Better Investor Relationship with Automated Process Tracking

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Ensuring Your Success, Always.

Client Profile

The client is a first of its kind, Government owned company which maintains infrastructure investment funds for international and domestic investors anchored by the government. With the goal of optimizing economic impact through infrastructure investment in both greenfield and brownfield projects, the client firmly believes in generating ROI through operating various investments across economic cycles.

The Challenge

The client was facing a huge challenge of inefficient investor relationship management. The client's investor relationship teams were using legacy spreadsheets for manual client data management, leading to siloed data, and inefficient client management and collaboration between internal teams and associated members. Lack of a centralized data repository led to several challenges including:

Manual data handling leading to data mismanagement: The entire investor data, including sensitive information related to communication and fund data was manually managed and stored across different MS Excel spreadsheets by multiple teams. This incoherent data storage was creating multiple, disconnected data silos where data was vulnerable and inefficient collaboration between team members.

Lack of effective investor relationship and communication tracking: Previously, there was no system in place to track and monitor different activities related to investor relationship journey and communication. There was an apparent requirement of an automated tracking system to track different activities across email campaigns, events, and other client communication touch points as well as investors' fund details and their journey with the investor relationship team.

Limited visibility into investor engagement: To enhance the team's visibility into investor engagements, it was imperative to have automated, real-time reports and dashboards that can be accessed from anytime, anywhere, and any device.

Lack of a centralized, cloud-based data repository	Labor intensive, error prone data management	Lack of tracking system for key client-oriented activities	No real-time visibility into the investor engagement activities

The Solution

Damco's Salesforce team undertook the task of providing the client's investor relationship team with a real time and complete view into their investor engagement activities through implementation of a tailor-made Salesforce Professional Edition Solution. By guiding the client through every step of deployment and keeping Salesforce Professional Edition limitations in mind, Damco's team deployed the following measures:

Successful implementation of Salesforce Professional Edition

Damco's Salesforce consultants worked with the client to figure out the key automations required to track and monitor their investors' engagements. Since Salesforce Professional Edition limits the code-based automations up to maximum of 5 Lightning flows, only critical processes were chosen to automate and same was communicated to the client during the initial phase to maintain transparency for the entire project.

Utilization of Salesforce Lightning Flows

The team also deployed Lightning Flows and several others declarative tools for highly optimized and efficient process automations to improve the team's efficiency.

Salesforce Training sessions on Einstein Activity

A wide range of intuitive dashboards and reports were developed for the team to manage their day-to-day tasks more effectively. The team was provided with customized training sessions on Einstein Activity capture and other administrative functionalities available for optimal utilization of the platform.

Value Delivered

Automated tracking system helped customer relationship team improve their client management.

- Real-time insights into the investors' funds and investments through reports and dashboards for more personalized customer interaction.
- Automated tracking of the entire investor journey, communication, and campaigns helped investor relationship team forge hyper-personalized bonds with multiple clients.
- Improved team productivity and efficient investor management with automation of key processes.

Transform Client Management with Salesforce

Schedule a Free Consultation

About Damco

Damco Solutions is a strategic Salesforce Gold Consulting Partner and holds expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customercentric digital-first organization.

Contact us for more information on Damco's Offerings.

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