

# Salesforce CRM Implementation Helped a Renowned Financial Services Analytics Company Simplify Sales Process, Improve Productivity, and Customer Satisfaction

Supported by Robust Salesforce Managed Services



## The Client Profile

The client is an analytical company providing ratings, research, and risk and policy advisory services and is a subsidiary of S&P Global. Their clientele includes lenders, investors, market intermediaries, banks, NBFCs, PSUs, financial institutions, state governments, urban local bodies, and asset and wealth management firms.

## The Challenge- End-to-End Sales Journey Management Using Manual and Legacy Tool-Based Traditional Methods Was Cumbersome, Time-Consuming, and Error-Prone

**Manual and Erroneous Processes:** The client was handling the entire sales process including lead management, client management, mandate processing, billing and other related tasks manually using traditional tools such as Microsoft Office and spreadsheets. The entire process consumed a lot of time, effort and led to error prone data.

**Slow Workflow:** In the absence of a centralized repository, the sales team had to spend a lot of time collecting and verifying the accuracy of data. As a result, the entire customer journey from receiving the mandate, surveillance to releasing the ratings took forever.

**Absence of Business Views:** As disparate excel sheets were used to generate reports there was no room for generating advanced insights based on the client data. The client was missing out on utilizing the insights to drive enhanced customer experience.



**Manual Handling of Sales Processes**



**Inefficient Data Collection and Verification**



**Lack of an Integrated System for Client Data Management**



**No Automated System for Report Generation**



**Delayed Client Service Leading to Low Customer Satisfaction**



**Poor Reliability and Trust Due to Inefficient Processes**

## The Solution

Damco evaluated the requirements of the client and helped them implement the world's leading Customer Relationship Management (CRM) software-Salesforce. This helped them bring everything including lead management, customer management, mandate processing, and billing into one centralized platform that was also accessible through mobile devices.

### **Salesforce CRM & Lightning Experience**

- Centralized database for enabling smoother business process management
- Automated communication to customers through reminders on due dates and scheduled tasks
- Customized screen to attach multiple products in a single screen to create a mandate with the required details
- Integration with other systems including billing/invoicing system to send and get the required results with just a few clicks
- Implemented a discounting mechanism to calculate the final amount and future surveillance mandates
- Custom dashboards for different sets of users depending on their requirement and usability
- Salesforce Lightning platform-based app development to provide new UI and accessibility across multiple devices like Desktops, Mobiles, and Tablets

### **Robust Salesforce Maintenance and Support Services For A Better Salesforce Experience**

- Damco helped the client achieve peak performance of Salesforce system with a flexible, robust and resilient 24\*7 tailor-made Salesforce managed services. Damco also provided certified salesforce developers and consultants to address a complex project activity and deal with complex and multiple scenarios increasing the overall ROI of the system.

# Value Delivered - Higher Operational Efficiency and Improved Employee Productivity

## Easier Client Management, Higher Productivity

Transitioning to Salesforce enabled the client to revolutionize the entire sales process, boost productivity and optimize costs. Here are some of the key benefits realized by the client:

- ▶ Simplified lead management and mandate processing for all the stakeholders.
- ▶ Improvement in the overall customer journey on account of a centralized system to manage the whole process.

Significant reduction in the time taken between receiving mandates and releasing ratings, resulting in cost optimization.

- ▶ Ability to access Salesforce through multiple devices like desktops, mobiles, and tablets allowed the business development team to focus on improved customer satisfaction.
- ▶ Increased productivity of the client's existing IT team with enhanced support from Damco through a flexible, robust, and responsive managed service solution.
- ▶ Increased ROI from Salesforce investments with better user adoption and overall performance.



## Watch Our Custom Salesforce Offering in Action

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### About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology 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 customer-centric digital-first organization.

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