

# Realize Transformational Outcomes with the Power of Salesforce

Streamline Lead-to-Cash for profitable growth, orchestrate seamless customer journeys for higher realization, and modernize after sales experience to increase customer life time value with **Salesforce and Birlasoft**



**In today's times, customers across B2C and B2B channels have distinct expectations which businesses need to understand and meet to stay competitive. Today customers are tech-savvy and prefer omnichannel experiences for seamless interactions across various platforms, and value hyper-personalized engagements, convenient delivery options, and 24/7 customer service**

Businesses are adapting to these rapid changes by integrating enterprise business processes and connecting with customers in new ways to improve realization, increase lifetime value of customers and attain profitable growth.

Over the years, Salesforce has transformed how organizations sell, market, and deliver services with its industry-leading offerings. The vast ecosystem of Salesforce solutions presents a wide ambit of possibilities for businesses. And unleashing Salesforce's fullest potential requires not only expertise in this ecosystem but also in executing business transformation.

Birlasoft is a trusted partner that can help businesses navigate these tactical hoops and lead them to transformational success with Salesforce. With a strong track record of delivering success, Birlasoft's Salesforce Practice is armed to deliver transformational outcomes with Salesforce solutions.

---



## Our Salesforce practice at a glance

450+ Salesforce Consultants

2000+ Projects Delivered

700+ Certifications

4.80 CSAT Score

70+ Customers

## Our salesforce expertise spans



## Our Services

We have a plan for organizations in every stage of Salesforce maturity

Our Salesforce Practice caters to organizations that are in the process of adopting a CRM, optimizing their existing Salesforce estate, or rationalizing deployments in M&A scenarios.

Packages & Services	In Process of Selecting a CRM	New Salesforce Customer	Existing Salesforce Customer	Mature Salesforce Customer
CRM Advisory Services	✓	✓	✓	✓
Proof of Concept	✓	✓	✓	✓
App Rationalization		✓	✓	✓
Salesforce Implementation		✓	✓	✓
Multi-Org Strategy			✓	✓
Health Check & Optimization			✓	✓

**We offer tailored Salesforce solutions that drive meaningful outcomes for businesses in each industry.**



**Manufacturing**



**Banking,  
Capital Markets,  
and Insurance**



**Life Sciences  
and Services**



**Energy and  
Utilities**

**1** Sales Enablement & CRM

**2** Lead 2 Cash Process

**3** Customer Support & Case Mgmt.

**4** Field Services

**5** Customer & Partner Portals

**6** Dealer/ Distributor Mgmt.

**7** Order Management

**8** Warranty Management

**9** Event Management

**10** Contract Lifecycle Mgmt.

**11** Lending & Loan Origination

**12** Wealth Management

**13** Subscriber Management

**14** Content Management

**15** Loyalty & Retention Mgmt.

# Key Salesforce Solutions

## 1 | Enhance Realization by Elevating Customer Experience

In an omnichannel world, disjointed customer interactions across channels lead to inconsistent experiences and affect customer loyalty. Our Salesforce solution helps you unify customer journeys to deliver seamless experiences across all touchpoints at scale.

- *Leverage the Salesforce ecosystem, omnichannel capabilities, and advanced UI/UX to orchestrate consistent and tailored customer engagement at every stage.*
- *Implement a fully integrated solution using Salesforce Data Cloud that synchronizes data and interactions across platforms, driving real-time engagement and precise customer interactions.*
- *Boost customer satisfaction, increase engagement, and build long-term loyalty to realize a significant impact on your topline and bottom line.*



## 2 | Achieve Profitable Growth with Streamlined Sales Processes

Disconnected sales, service, and finance processes can lead to delays and revenue leakage that compound over time. Our integrated solution powered by Salesforce bridges these gaps and implements a seamless lead-to-cash process that automates customer journeys and maximizes operational efficiency.

- *Build end-to-end digital processes that accelerate workflows, bring precision, and enhance sales productivity across the lead-to-cash cycle.*

- *Harness the power of Salesforce CRM and cloud ERP systems like SAP S/4 HANA, Oracle Cloud, Infor, NetSuite, and JD Edwards to modernize the lead-to-cash process.*
- *Leverage Salesforce Revenue Cloud to enable product-to-cash automation on one trusted platform.*
- *Leverage process improvements through process mining tools like Celonis to improve customer experience, achieve operational efficiency, and maximize business value.*



### **3 | Increase Customer Lifetime Value with Modernized Aftersales Experience**

Inefficiencies in aftermarket sales, service management and field operations lead to missed growth opportunities, delayed service, and dissatisfied customers, especially in manufacturing, MedTech, and energy and utilities. Our Salesforce solutions transforms after sales services and drives seamless operations to maximize customer satisfaction.

- *Leverage Salesforce platform to track warranties, product upgrades and spare parts allowing sales teams to upsell and cross-sell.*
- *Combine the capabilities of Salesforce Field Service and ServiceMax to transform your field operations, ensuring efficient service delivery and improved productivity.*
- *Deploy end-to-end solutions that streamline work order management, technician dispatch, inventory management, and service tracking, all while reducing turnaround times.*
- *Leverage industry expertise to enhance customer satisfaction, unlock cross-sell opportunities, and accelerate business growth.*



# Why Birlasoft for your Salesforce transformation

**1** End-to-end services, from consulting to implementation, integration, management, and support.

**2** Strong Salesforce partnership enables us to apply the latest tools, resources, and innovations to your advantage.

**3** Continuous investments in R&D, AI, ML, and automation to enhance our Salesforce solutioning.



**4** Industry-specific expertise helps us build solutions that make sense at the grassroots level of operations.

**5** Strong focus on understanding your requirements through collaborative relationships with CIOs and business executives.

**6** Context-aware solutions for startups, fast-scaling organizations, and multinational companies.

# Delivering customer success through every engagement

01

## Accelerating client onboarding for a financial services company

### Challenges

Inefficient client enrollment and validation processes hindered digital transformation efforts. Manual workflows and multiple system integrations slowed sales performance tracking.

### Birlasoft Solution

1. Implemented Salesforce CRM for digital enrollment and validation.
2. Developed a modular solution for third-party service integration.
3. Enabled seamless conversion of B2B leads into accounts.
4. Integrated sales performance and incentive calculations in CRM.
5. Provided ongoing support and training for system adoption.

### Impact Delivered

- Unified platform for managing client enrollments.
- Achieved a 360-degree view of sales performance.
- Enhanced operational efficiency and client satisfaction



02

## Simplifying contract management for a global media conglomerate

### Challenges

Manual contract management workflows caused inefficiencies and delays in project tracking. Lack of visibility hampered the ability to manage talent deals and content acquisitions.

### Birlasoft Solution

1. Implemented Salesforce integrated with Conga CLM for workflow automation.
2. Developed tailored contract templates for diverse deal types.
3. Created a guided deal-point entry wizard for streamlined processes.
4. Enabled automated contract generation and lifecycle management.
5. Digitized workflows across multiple departments for better tracking.

### Impact Delivered

- Built a 360-degree view of projects and contracts.
- Reduced contract generation cycle time by 64%.
- Facilitated mobile access for remote approvals and negotiations.

## 03

### Transforming customer service for a medical devices manufacturer

#### Challenges

Existing customer service processes were inefficient, which led to high turnaround times for complaint resolution. Multiple legacy systems complicated case routing and asset tracking.

#### Birlasoft Solution

1. Implemented Salesforce Service Cloud and ServiceMax for end-to-end customer service solution
2. Transformed service operations from Salesforce Classic to Lightning.
3. Integrated telephony and omnichannel support for improved case management.
4. Developed customized workflows for efficient work order dispatch.
5. Launched ServiceMax Go App with offline capabilities for technicians.

#### Impact Delivered

- Improved user interface and operational efficiency with Salesforce Lightning.
- Increased first-contact resolution rates by 25%.
- Enhanced technician productivity through mobile-enabled features.



## Ready to unleash the power of Salesforce at your organization?

Get in touch to see how we can help you  
realize transformative impact with Salesforce.

[contactus@birlasoft.com](mailto:contactus@birlasoft.com)

### Empowered by **Innovation**

Birlasoft combines the power of domain, enterprise, and digital technologies to reimagine business processes for customers and their ecosystem. Its consultative and design thinking approach makes societies more productive by helping customers run businesses. As part of the multibillion-dollar diversified CK Birla Group, Birlasoft with its 12,500+ professionals, is committed to continuing the Group's 161 year heritage of building sustainable communities.

[contactus@birlasoft.com](mailto:contactus@birlasoft.com) | [birlasoft.com](https://birlasoft.com)



RESOURCES