

CASE STUDY

CLIENT OVERVIEW

inoday client is a leading Software solution provider that has delivered several software services to its globally located clients. Backed with a rich experience in the software domain, our client has served to a huge client base at domestic and international level. With a team of immensely skilled professionals from Software background and all latest in-house facilities, our client is making a rapid growth among its business contemporaries. With an aim to serve customers with optimum efficiency, the client came to us to switch from existing manual business processes to the latest customer management software. Implementing required functionalities and offering automated processes, our client got help in catering to its clients flawlessly.

CLIENT'S BUSINESS ISSUES

- Client had low lead conversion rate with no visibility to sales pipeline.
- Missing 360^o holistic view.
- Due to all manual business handling processes including accounting process, client faced functionality obstacles at every step.
- All follow-up processes with financial department were handled manually.
- Client had manual process for generating reports.
- Client didn't have 'accounting package' and 'sales data' integration, which led to several calculation errors.
- Disorganized management of renewals.

SOLUTION OFFERED BY INODAY SALESFORCE TEAM

- inoday Salesforce experts implemented partner portal for vendors.
- Our Salesforce experts automated entire Accounting process to resolve existing issues.
- Accurately structured design of automation resulted in accurate data report.
- Our team integrated financial ERP with Salesforce for accurate results.
- inoday experts implemented an automated renewal process to help in managing and prioritizing renewals in chronological order

IMPACT OF ERP INTEGRATION WITH SALESFORCE

- Better sales pipeline visibility helps client with an improved lead-conversion-rate.
- Due to automated Accounting process, the client now has an accurate business data processing.
- With all automated report generating, financial and other business handling processes; client now has a well-structured business.
- Employees got ease at every business management process with all offered Salesforce benefits.

