



Enhancing Salesforce usability Insurance Company

Challenge

- Using Salesforce to store all basic information related to Accounts and Customers.
- System neither capable of providing required level of reporting nor 360-degree view of active policies, customer purchases, call details etc.
- End customer not enabled to update contact details, check for active and inactive policies, search and compare policies or buy policies online.

Our Solution

- Implemented Visualforce pages to enhance Salesforce functionality for sales team, which will allow them to use a specific flow for each customer while on call.
- Implemented Salesforce integration with various databases such as MangoDB, using Apex and PHP.
- Worked with the client to integrate Salesforce with their website.
- Installed AppExchange products like Conga.
- Customized Salesforce to achieve client requirements - 360-degree view of customers, manage purchased policy details.
- Customized Salesforce to set workflow rules to remind sales team about policy expiry dates.

Business Benefits

- Decreased level of duplicate information.
- Improvement in information sharing across departments.
- Improved interaction between customers and sales team.
- Ease of entering new contacts and monitoring interaction with all contacts.
- Improved Reporting.
- Reduced administration due to integration with the website.

Client Background

- Company providing Life insurance policies to end customers.
- Sales professionals support end customers by advising and giving tips during and after insurance policy purchase.
- Sales team currently using Salesforce for regular sales process.
- Need to enhance Salesforce functionality by integrating Salesforce with existing website and other systems.

About CloudChillies

Cloud Chillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. Our team has 13+ years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Force.com platform development. We assess your needs to provide maximum value through IT to greater your impact and achieve your mission.



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