



## Driving higher ROI for an Insurance company using Salesforce and Real Time

### Challenge

- Need for setting up the Salesforce architecture to better satisfy the customers
- Need to auto assigning of customer calls to the right agents

### Our Solution

- Customized the Salesforce architecture using automation processes, custom buttons, visualforce pages and apexclasses
- Integrated Salesforce with Campaign Monitor to gain a more complete view of customers in both apps and also gain visibility to both sales and marketing activities
- Automated the assignment of cases (customer calls) to agents in South Africa and Australia considering factors such as territory alignment, existing case record, skills and availability of the assigned representative, and fairness in lead distribution
- Connected leads to agents in real-time, using live filters for intelligent mapping
- Fetched the best cases and used rule-based routing to assign them appropriately to available case support agents
- Locked the case, once assigned, for other agents to ensure process synchronization
- Did AWS integration to keep logs for assignments or an audit trail for rule changes
- Facilitated direct calling from within Salesforce for simplifying the process and also to aid with record keeping

### Client Description

Works as online insurance agent that connects customers with the insurance provider company that suits the customers the most

## Benefits

- Increased performance of agents by providing a fast, efficient and seamless interface
- Enhanced employees' productivity by automated, fast, and accurate lead assignment process
- Did away with confinement imposed due to international borders and global team structures

### About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.

 CloudChillies



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