

HEXAWARE

Salesforce Cloud for CRM Transformation

Seamless, Collaborative Sales and Client
Relationship for a Global Professional
Services Company

Case study



Client

| Client

- Challenge
- Solution
- Benefits
- Summary

Our client is a prominent business process service entity with a workforce of 3000+ employees. They specialize in offering a spectrum of services for corporate, private equity, real estate and more. With a strong commitment to excellence, they have become a trusted partner for businesses globally.

Their impressive portfolio, totaling half a billion dollars, reflects their expertise in facilitating growth and success across diverse industries. Through relentless dedication to client satisfaction, they stand as a beacon of reliability and innovation in the business landscape.

Half a billion \$
in revenue



Challenge

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| **Challenge**

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Our client's imperative was to streamline its commercial processes, foster seamless data-sharing, and capitalize on cross-sale opportunities for their diverse array of products and services. Concurrently, they aspired to build a more engaging customer experience and fortify customer loyalty.

The primary objectives encompassed improving sales performance, optimizing data pipeline management, standardizing pricing and discounting procedures, and modernizing their contract management processes. A pivotal aspect of this endeavor was to establish robust compliance measures and ensure the accessibility of data, underscoring the need for a comprehensive and cohesive solution.

In essence, the client aimed to evolve into a technology and services platform organization, viewing this initiative as a critical stride in their overarching transformation journey. The challenge was not merely technical but also strategic, requiring a holistic approach to unify disparate systems, enhance operational efficiency, and propel the organization towards its envisioned future state.

Our client's business and data management platforms were fragmented, and the many unintegrated **Salesforce instances across their organization** each served a distinct function.

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Salesforce Cloud Strategy and Implementation

Hexaware worked closely with our client's business and IT teams and improved Salesforce Cloud and Data Architecture for improved business processes. Our teams facilitated multiple critical updates:

- We reviewed the current state and maturity of the sales, pricing, and contracting processes
- We developed a global process for the future state
- We simplified the global product/services portfolio
- We designed and developed a multi-currency and multi-jurisdictional pricing system
- We defined sales credits and commissions evaluation modules
- We integrated services, billing, and the ERP platform to enable automation and digitization

Salesforce Cloud Services

By harnessing the power of Salesforce's leading solutions, including Sales Cloud, Service Cloud, and Configure, Price, Quote (CPQ) Cloud, we seamlessly transformed our client's sales, quoting, and contracting processes.

This strategic integration underscores our commitment to leveraging industry-leading technology for enhanced customer relationship management, streamlined sales

operations, and efficient quoting and contracting procedures.

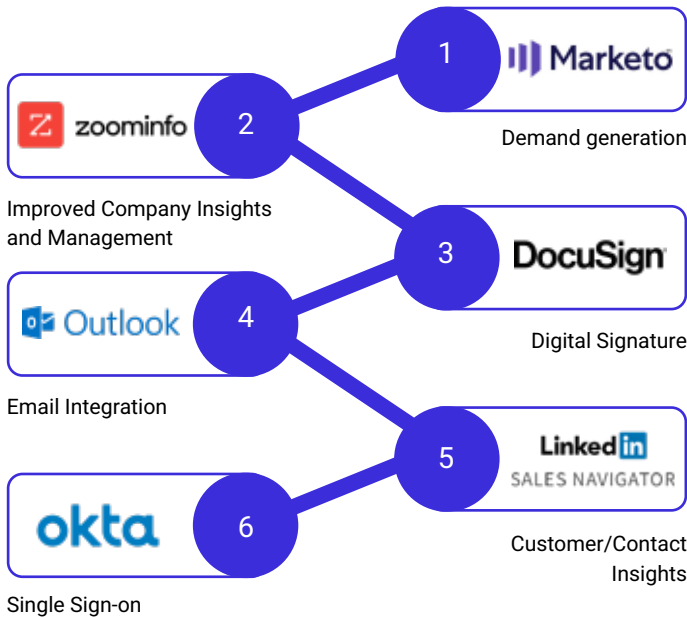
Salesforce CPQ Cloud

- Provided a single instance of Salesforce across all business units with access to data for all users as a 'Single Source of Truth'.
- Built a single interface to other systems (Viz. ERP, Viewpoint) across the business units to share data.
- Enabled setup of the products and services using CPQ Cloud to enable individual quotes.
- Localized discount approvals based on thresholds.
- Localized country-specific quotes and contracts.

AI-driven Salesforce Einstein Cloud

Our integration activities delivered a single view of global and local customers, revenue year-to-date, and lifetime revenue, amongst other things. Using Salesforce Einstein AI, the integrated system could now measure cross-sell index and provide potential opportunities for growth with AI-driven Insights.

We also integrated a wide range of pivotal tools for cross collaboration, business intelligence, and security. Our system leveraged:



Our Solution Features:

- Lead management
- Account and contact management
- Intermediary management
- Opportunity management
- Sales campaign management
- Case management to capture feedback
- Intuitive and user-friendly user interfaces
- Comprehensive dashboards and reporting

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Efficient Account and Contact Management

We implemented an enhanced platform optimizing account and contact oversight, including:

- Account hierarchy enabling parent-child structures
- Global engagement snapshot mapping client reach
- Tailored data overviews by segment

Increased Sales Opportunity Insights

The solution provides greater visibility into opportunities:

- Tracking by jurisdiction, sector, marketing and delivery
- Tailored opportunity type information
- Origin and execution market tracing

Enhanced Case Management

Case management was consolidated for:

- Issue, NPS and termination tracking
- Integrated feedback capture
- Credit memo oversight efficiencies

Comprehensive Lead Management

The platform also enables robust lead management:

- Easy lead capture from marketing tools
- Streamlined lead sharing and nurture
- Tracking lead source and channel efficacy
- Origin-based lead assignment
- Stage-by-stage oversight
- Conversion to accounts, contacts and opportunities

Data-Driven Decisions

New dashboards deliver:

- Personalized home page access
- Sales performance snapshots
- Pipeline, deal and regional insights
- Team progress visibility

A Structured Data Migration Approach

Within one month:

- 15% increase in sales opportunities
- 30% improvement in contact linkage

The platform delivered a comprehensive solution spanning critical business areas—accounts, contacts, opportunities, cases, and leads—unified by intuitive dashboards. This enabled data-driven decisions and structured oversight for optimized management.



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Hexaware's strategic Salesforce Cloud implementation and enterprise-wide platform integration elevated our clients to the pinnacle of modernized sales encompassing – Sales Cloud, Service Cloud, CPQ Cloud, and Einstein Cloud. We revamped lead management, created a platform to track and collaborate on sales opportunities, and streamlined pricing and quoting processes.

This transformative journey places our clients at the forefront of streamlined sales operations and empowers them with an advanced reporting system, courtesy of Salesforce. Hexaware's commitment to excellence with Salesforce ensures a cutting-edge, end-to-end solution, propelling our clients into a new era of business efficiency and success.



About Hexaware

Hexaware is a global technology and business process services company. Our 27,000 Hexawarians wake up every day with a singular purpose; to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With 40+ offices in 19 countries, we empower enterprises worldwide to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at www.hexaware.com.

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