

Enhancing CRM Efficiency with Custom Salesforce Solutions

How Milestone implemented tailored Salesforce workflows, automation, and integrations, enabling a global financial services organization to streamline operations, improve customer support, and align teams with key business objectives.

The Background

The client is a prominent global financial services organization operating in a highly regulated environment. It specializes in providing secure cross-border payment services tailored for banks, foreign exchange businesses, money transfer organizations, payment aggregators, and e-commerce enterprises.

Focusing on ensuring compliance and safety in international financial transactions, the client plays a vital role in facilitating seamless and secure payment flows across global markets.

The Business Problem

The client was undergoing a CRM infrastructural revamp, which required the development and implementation of multiple custom solutions within their Salesforce instance. These solutions were to align seamlessly with the organization's existing functional stack and complement ongoing enhancements in their Salesforce automation processes.

Ensuring compatibility between new and existing functionalities was critical to maintaining smooth operations and achieving the desired improvements across their CRM platform.

The Objective

The objective was to introduce custom workflows and key automation to enhance and streamline CRM operations. This initiative aimed to onboard multiple workstreams from across the client's business, ensuring they adopt Salesforce for their day-to-day activities.

The goal was to create a unified and efficient platform that facilitated seamless operations and improved collaboration across departments.

In summary:

- Implement custom workflows to refine CRM processes.
- Introduce key automation to enhance operational efficiency.
- Onboard various business workstreams onto Salesforce.
- Ensure smooth adoption of Salesforce for daily operations across teams.

The Milestone Solution

Milestone implemented several custom solutions to enhance the client's CRM operations and streamline communication across departments. An external communication tool was developed to send mass emails to specific clients, notifying them about incidents, platform changes, and scheduled maintenance. Business automation was configured to optimize operations across departments, and email-to-case automation was set up to streamline customer inquiries via service addresses.

To ensure operational efficiency, SLA and OLA goals were established, and this helped track service-level performance. A custom approval process was developed to manage payment route approvals transparently, allowing approvers to raise questions or provide feedback during new route implementation.

Additionally, Outlook and Salesforce were integrated to automate calendar invites for maintenance events, ensuring stakeholders remained informed about change windows. Milestone also introduced custom forecasting features for opportunities, enabling better analysis of client retention and revenue trends.

In summary:

- Developed an external communication tool for mass email notifications.
- Configured business automation to refine operations.
- Implemented email-to-case automation for seamless customer support.
- Established SLA and OLA goals for performance tracking.
- Created a custom approval process with transparency for payment routes.
- Integrated Outlook and Salesforce to automate maintenance notifications.
- Developed custom forecasting to analyze retention and revenue trends.

The Result

The implemented solutions yielded significant improvements across operations. Case management was optimized by utilizing 70% of standard email-to-case features, creating a more structured process. The approval workflow for new route implementations became seamless, simplifying the process of sending requests and managing approvals.

The adoption of a new SLA and OLA matrix enhanced workforce alignment with job objectives and KPIs, ensuring better accountability and efficiency.

In summary:

- Optimized case management using standard email-to-case features.
- Streamlined approval requests and management for new routes.
- Improved workforce alignment with job objectives through an SLA and OLA matrix.

Key Learning

Several key learnings emerged from this project, focusing on automating processes and improving operational efficiency. A manual process was identified and transformed into an automated workflow, leveraging Salesforce's out-of-the-box automation features, which significantly boosted productivity. Email-to-case automation streamlined customer support by automating the handling of emails sent to service addresses, enhancing support efficiency.

The adoption of SLA and OLA goals improved accountability within service teams, ensuring deadlines were met and customer satisfaction scores increased. As automation progressed toward full implementation, a custom approval process with quality gates was introduced to facilitate managerial evaluations. These gates allowed teams to monitor and measure quality throughout the process, ensuring that customer and internal standards were met.

In summary:

- **Business Automation:** Transformed manual processes into automated workflows, improving productivity.
- **Email-to-case Automation:** Enhanced support efficiency by automating the management of emails to service addresses.
- **SLA & OLA goals:** Improved accountability and customer satisfaction through better tracking of agreements.
- **Custom Approval Process:** Introduced quality gates to facilitate managerial evaluations and monitor automation quality.



Why Milestone

Milestone was chosen for its ability to deliver tailored CRM solutions that seamlessly integrated with the client's existing technology stack. With deep expertise in Salesforce, automation, and process optimization, Milestone implemented custom workflows and tools that aligned with the organization's operational needs.

By automating case management, establishing SLA and OLA frameworks, and streamlining approval workflows, Milestone enhanced operational efficiency and accountability. The integration of Salesforce and Outlook for automated notifications, alongside advanced forecasting capabilities, empowered the client to optimize revenue management and improve customer support, ensuring a more seamless user experience.

About Milestone

Milestone Technologies is a leading global IT services and digital solutions provider that collaborates with organizations worldwide to revolutionize their technology infrastructure and digital capabilities.

With a strong commitment to innovation and customer satisfaction, we empower businesses to accelerate their digital transformation journey and unlock new opportunities for growth and success.

By leveraging our extensive expertise in cutting-edge technologies, we provide companies with the agility and scalability needed to stay ahead in today's rapidly evolving digital landscape.

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