

Increasing Customer Experience With Salesforce CRM Analytics

Summary

One of the largest community banks wanted to make use of its customer data to provide them the best experience through customized marketing campaigns. The bank wanted to maintain consistent personalized communication with its clients offering them product and service recommendations to build a robust CRM strategy and increase sales. Expedite Technology Solutions offered consulting services and developed an innovative CRM solution that met the client's customer experience and sales enablement requirements while conforming to data compliance statutes.

Client Goals

- Make the best use of customer information to increase sales
- Provide timely, personalized communication to all types of clients

Services/Technology Used

- Salesforce Development
- Data Warehousing
- SOAP and REST Webservices
- BI
- Data Model Security and Process Automation

Challenges

The client faced enormous competition and wanted to commit to a robust CRM strategy to increase customer experience and retain valuable customers. Its customers were using multiple devices to carry out transactions or making queries. All its business functions were operating in silos, which created a challenge in team collaboration by sharing useful data. The client wanted to integrate data from multiple platforms and sources to create meaningful data that can be shared across different business functions.

Strategy

Expedite Technology Solutions used data warehousing by integration of data from multiple sources and used Salesforce BI tools to generate dashboard reports with useful information. The business intelligence is used to segment audience automatically and the data is effectively used to build custom marketing campaigns. The powerful data analytics led to effective cross-business communication. Lead hygiene in the sales process improved dramatically resulting in 15% increase in sales within 6 months after project completion.

Results Achieved

- Sales increased by 15%
- Customer's CSAT Score Increased by 30%
- Customer Lifetime Value of desired segment increased by 4%

**Are You Looking To Implement CRM
Solutions?**

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