

Success Story

Making Every Customer Interaction Count with the **Next-Gen CRM Strategy**



Objective

A large US Enterprise wanted to improve their customer experience, enhance data management, and leverage automation capabilities for efficient workflows. They required expert consultation and implementation services for a unified, future-ready platform, so they approached Exavalu.

Services Offered

Advisory



Implementation



Challenges

Our client relied on manual, time-intensive, and inefficient appointment scheduling processes. They lacked visibility in key marketing metrics such as customer retention and site utilization. Disparate data sources hindered actionable business insights, while the absence of self-scheduling capabilities and automation led to communication gaps with the customers.

How Exavalu Drove Change

Our Methodology and Approach

Exavalu focused on defining future processes for scheduling, pre-screening, and collections, ensuring a structured approach to customer management. We started with a detailed assessment of Salesforce Sales Cloud and Lightning Scheduler to evaluate its suitability as the future platform. We then developed a complete roadmap to align our client's business processes with Salesforce CRM capabilities.

Our solution followed a low-code approach to minimize maintenance, while enabling flexibility for enhancements. We introduced proper Email and SMS channels to automate transactional communication and enhance customer engagement. We also implemented flow-based automation to calculate customer eligibility and leveraged complex business rules to streamline pre-screening and collection workflows.

Business Impact

- Provided a clear roadmap for CRM evolution, enabling strategic planning and seamless transition.
- Reduced time and effort significantly for appointment scheduling, leading to improved customer interactions and engagement.
- Centralized and structured all the information within Salesforce to support data-driven marketing strategies and decision-making.
- Improved the ability to analyze customer behavior, track specialized recruitment, and tag customers for exclusive programs.

Key Highlights

5000+ customers served

5+ Campaign centers onboarded across multiple US locations

10+ Specialized Community Engagement Campaigns supported

1 Platform for unified view of customers