



Case Study

Insurance Company Itself Invested in Salesforce Services of Codinix to Get More Investors

Problem Statement

Well known Insurance Company that was heavily invested in the Salesforce Platform across the entire organization, wanted to build their entire Campaigning and Lead Nurturing process and customer support in salesforce by leveraging Salesforce Sales, Marketing, Service and Community cloud features.

Solution Implemented

- Created a roadmap of release phases, targeting Clients requirements on the basis of priority.
- Extended Partner Community and Sales cloud to create and manage offline/online Campaigns in Salesforce and add-on functionality to notify target audience using Marketing Cloud email/sms services.
- Integrated multi-channel lead forms i.e. web-based, email-based, referral based, 3rd party integration and official website in Sales cloud. And, auto assignments of incoming Leads to the agents based on their campaign details.
- Emails and SMS based lead onboarding journeys, created in Marketing cloud to manage and engage with leads and agents.
- Well focussed customer support using case-management at Customer Community via case-assignment, case escalations. case surveys and Articles for self support.