



Case Study

New York, USA - Optimizing Claim Management Efficiency with Salesforce and Zoho Creator

Our client is a multinational corporation headquartered in New York City, USA, overseeing a diverse portfolio of nearly 100 companies, establishing themselves as a prominent business group in the United States.

Problem Statement:

The client faced a significant challenge with their manual claim management process, consuming substantial time and resources. They sought to expedite the claims settlement process and establish a robust claims tracking system.

Solution Provided:

Leveraging Salesforce and Zoho Creator:

In a swift 5-month timeframe, we devised and implemented a fully customized, automated claim management system, strategically harnessing the capabilities of Salesforce and Zoho Creator.

System Overview:

Our tailored solution operates as an internal platform accessible to the client's administrators and vendors, providing streamlined claims management and tracking from multiple locations. The user interface (UI) was meticulously designed for user-friendliness, requiring minimal training. To ensure unwavering system reliability, we integrated comprehensive failure monitoring systems, rapidly identifying and addressing any issues. Our commitment extends to continuously enhancing the system, incorporating new features to meet the evolving needs of our client.

Salesforce Integration:

Tailored Claim Management: Salesforce was instrumental in creating a customized internal claim management system that perfectly aligns with the client's unique requirements.

Zoho Creator Integration:

Streamlined Efficiency: Zoho Creator played a vital role in optimizing processes and enhancing efficiency within the claim management system.

Benefits to Client:

Enhanced Efficiency: The automated system significantly expedited the claims settlement process, reducing time and resource requirements, largely attributable to Salesforce.

Transparency: Real-time tracking capabilities provided the client with full visibility into claim status at every stage, enhancing decision-making, a direct result of Zoho Creator's contributions.

User-Friendly: The intuitive UI design ensured that employees and vendors could effortlessly interact with the system without the need for extensive training, with combined efforts of Salesforce and Zoho Creator.

Reliability: Our failure monitoring system, a collaborative effort between Salesforce and Zoho Creator, proactively identifies and addresses issues, ensuring uninterrupted operation.

Scalability: The system, powered by Salesforce and Zoho Creator, is designed to adapt and grow with the client's evolving needs, providing a sustainable long-term solution.

Conclusion:

In conclusion, our tailored solution not only effectively addressed the immediate challenge of claim management but also positioned our client for future growth and operational efficiency, with Salesforce and Zoho Implementation at the forefront of this technological advancement.

