NeoSOFT®

Capabilities

Salesforce

About Us

25+ YEARS OF EXCELLENCE

CMMI DEV /5

Overview

4000+
Employees

10
Global Offices

9
Development Centers

1,00,000+ Sq.ft.
Office Space

Clientele

1500+
Clients

50+
Countries

85%
Clients Retention

22+
Industry Verticals

Achievements

2000+
Products Engineered

1500+
Applications Developed

12+
Awards

20+
Million Development Hours

Partners

aws

SAP

Microsoft®

Google Cloud

Magento®

Certified To Deliver Quality

Great Place To Work®
Certified INDIA

KPMG

This is to affirm that

NeoSOFT Private Limited

Organizational Unit: Software Development Unit

has been appraised at

Maturity Level 5

of the Capability Maturity Model Integration for Development, Version 3.0

CMMIDEV/5 ℠

CMMI ® V 3.0 / Exp. 2027-08-17 / Appraisal #72520

ISO
9001:2015
Quality Management

ISO
27001:2013
Information Security

ISO
20000-1:2011
IT Management

ISO
22301:2012
Business Continuity Management

What We Do

Team Augmentation

A team of 4000+ Battle Tested engineers across 100+ Different Stacks.

We are your Digital Factory, dedicated teams to supercharge your development throughput.

0 Operational Overheads.

Agile & On Demand.

Fixed Scope

We offer meticulously crafted project specifications and timelines for cutting-edge development, seamless integrations and feature-rich solutions.

The NeoSOFT approach ensures your projects are delivered with precision and excellence.

Managed Services

Our IMS services helps enterprises to run Business as usual.

With strong SLA driven services, 24x7 Support, Governance and Technology expertise, we help to optimize processes and costs.

Our Salesforce Capabilities

Salesforce Sales Cloud

- Lead Management
- Sales Forecasting
- Reports and Dashboards
- Partner Management
- Opportunity Management

Salesforce Service Cloud

- Customer Service Management
- Self-service Management
- AI for customer service
- Digital Channels
- Field Service

Salesforce Marketing Cloud

- Email Studio
- Social Studio
- Pardot
- Advertising Studio
- Customer 360 Audiences
- Google Marketing Platform

Salesforce Commerce Cloud

- B2B Commerce
- B2C Commerce
- Order Management
- Content Management
- AI for Commerce

Salesforce Financial Service Cloud

- Wealth Management
- Insurance
- Banking

Salesforce Einstein

- Einstein Prediction Builder
- Einstein Bots
- AI Deep Dive

Salesforce Community Cloud

- 3rd party Data Integration
- Customization
- Branded Community
- Mobile Optimization
- Business Integration
- Personalization

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Salesforce Development Services

01. **Salesforce Consulting**

Our committed CRM professionals assist you in maximising the possibilities of your Salesforce deployment by helping you enhance your sales cloud, pardot, and marketing cloud capabilities.

02. **Salesforce Customization**

With the greatest salesforce development services, from dashboard customization to style and logic, we will provide you a wide range of amazing salesforce customisation solutions.

03. **Salesforce Integration**

Provide your company complete operational insight by integrating Salesforce with any cloud-based or on-premises system, including order management, marketing automation, and enterprise resource planning (ERP).

04. **Salesforce Implementation**

Take advantage of result-driven Salesforce CRM installation services to implement a variety of Salesforce solutions from various industry verticals and to get rid of any complexity or bottlenecks.

05. **Salesforce Support**

Obtain maximum assistance from feature improvements, maintenance, and performance monitoring to guarantee consistent performance and prompt improvement as necessary.

06. **Salesforce App Development**

Our whole suite of Salesforce app development services are at your disposal to design smart Salesforce apps. With our outstanding expertise, we can remodel your business beyond its bare functions.

Salesforce Technologies Experience

Apex code

Appexchange

Visualforce

Customer 360 Platform

Lightning Web Components

Communities

REST/SOAP API

Aura/LWC

Salesforce 1

Industries Served

ISVs-Digital Products & Platforms	E-Commerce & Retail	Education & E-Learning	Financial Services
Healthcare	Hospitality	Logistics & Supply Chain	Manufacturing
Media & Entertainment	Professional Services	Real Estate	Telecom

15+ years
of expertise in CRM consulting

100+
Salesforce Developers

24x7
Technical support

Selected Clientele

Deloitte.

KPMG

BCG

EY — Building a better working world

paypenny

pwc

Affinidi

Emirates NBD

JAL JAPAN AIRLINES

ebay

Stanbic Bank

Bapco بابكو

APL

DFID — Department for International Development

T Mobile

Emcure — SUCCESS THROUGH INNOVATION

etisalat

Virgin mobile

Forbes

standard chartered

GEMS EDUCATION

GENERALI

HT MEDIA GROUP

Moët Hennessy

Johnson & Johnson

Mercedes-Benz

netmeds

BRITISH AIRWAYS

Zimmber

pepperfry

turtlemint

Jio Saavn

The Souled Store

Craftsvilla

HOUSING.com

Case Studies

Utilized Salesforce to streamline database and integrate modules.

A Leading Automotive Paint & Supply Distributor Providing Collision Repair Products & Services.

Lead Generation   Salesforce   UI/UX   Enhanced Performance

Outcomes

Innovative Modules

- Developed modules for Vendor Management, Catalog Management, and Spotlight Products using Salesforce.

Enhanced Lead Generation

- We implemented Salesforce web-to-lead forms to streamline lead capture processes.

Data-Driven Decision-Making

- Incorporated Salesforce as a central repository for all lead and product data, helping actively leverage data-driven insights for more effective decision-making.

Solutioning

Challenges

- Manual lead data entry was time-consuming and error-prone, slowing down response times.

- Vendor information and communication management were inefficient and scattered.

- Product information updates were cumbersome and often led to outdated data.

Solution Highlight

- Implementing Salesforce web-to-lead forms automated lead capture, reducing manual effort and errors.

- The Vendor Management module in Salesforce centralized vendor data, contracts, and communications.

- The Catalog Management module in Salesforce enabled real-time product updates, ensuring accurate information presentation.

Streamlined customer flow management in Salesforce.

An Interior Design And Home Furnishing Company Specializing In Interior Design Solutions.

Inventory Management   Salesforce   UI/UX   Streamlining Customers

Outcomes

Inventory Management

- Leveraged salesforce to seamlessly manage inventory across multiple locations.

Enhanced Customer Flow Management

- Salesforce enabled employees in all showrooms across India to efficiently manage the customer journey, starting from lead generation to order creation.

Customer Service

- Unified data access with salesforce for enhanced efficiency helped streamline customer service.
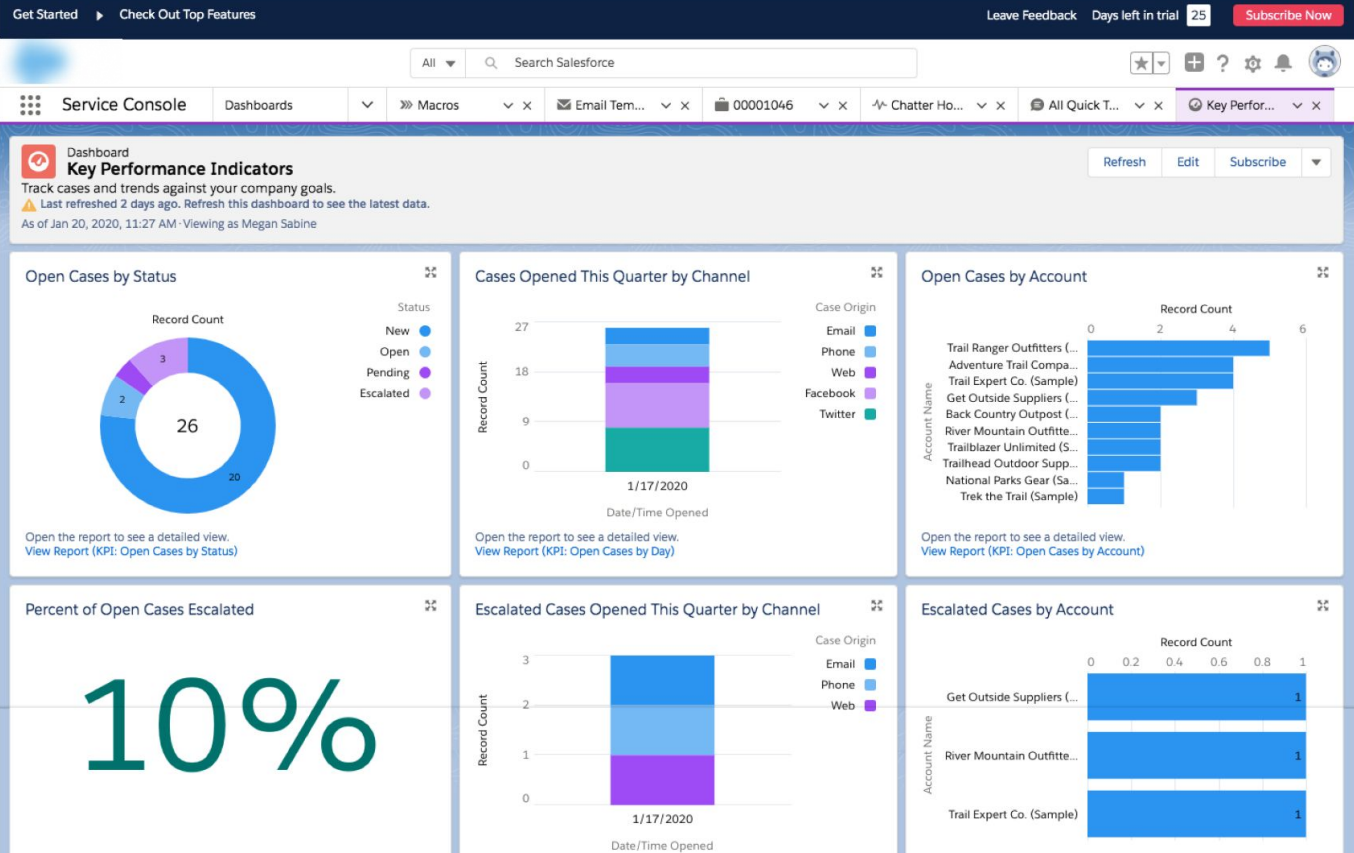
Solutioning

Challenges

- Simplifying Complex Customer Flow Management.

- Tracking inventory accurately across various locations resulted in discrepancies due to manual data entry errors or delays in updating records.

- Customer data was scattered across various systems and databases, making it difficult for customer service representatives to access complete and up-to-date information.

Solution Highlight

- Implemented custom Salesforce workflows and process automation to manage the flow of customers effectively.

- Salesforce allowed real-time tracking of inventory levels across all locations. Automated updates minimized data entry errors, ensuring accuracy.

- Salesforce served as a centralized repository for customer data, consolidating information from various sources into a single, accessible platform.

All ▾   🔍 Search Salesforce

⚏ Service Console   Dashboards ▾   ⁕ Macros ▾ ✕   ✉ Email Tem... ▾ ✕   🗋 00001046 ▾ ✕   ⟋ Chatter Ho... ▾ ✕   ▦ All Quick T... ▾ ✕   ◎ Key Perfor... ▾ ✕

Dashboard
Key Performance Indicators
Track cases and trends against your company goals.
⚠ Last refreshed 2 days ago. Refresh this dashboard to see the latest data.
As of Jan 20, 2020, 11:27 AM · Viewing as Megan Sabine

Refresh   Edit   Subscribe ▾

Open Cases by Status

Record Count

Status
- New 🔵
- Open 🔵
- Pending 🟣
- Escalated 🟣

3
2
26
20

Open the report to see a detailed view.
View Report (KPI: Open Cases by Status)

Cases Opened This Quarter by Channel

Case Origin
- Email 🟦
- Phone 🟦
- Web 🟪
- Facebook 🟩
- Twitter 🟩

27

18

9

0

1/17/2020
Date/Time Opened

Record Count

Open the report to see a detailed view.
View Report (KPI: Open Cases by Day)

Open Cases by Account

Record Count

| | 0 | 2 | 4 | 6 |

Trail Ranger Outfitters (...
Adventure Trail Compa...
Trail Expert Co. (Sample)
Get Outside Suppliers (...
Back Country Outpost (...
River Mountain Outfitte...
Trailblazer Unlimited (S...
Trailhead Outdoor Supp...
National Parks Gear (Sa...
Trek the Trail (Sample)

Account Name

Open the report to see a detailed view.
View Report (KPI: Open Cases by Account)

Percent of Open Cases Escalated

10%

Escalated Cases Opened This Quarter by Channel

Case Origin
- Email 🟦
- Phone 🟦
- Web 🟪

3

2

1

0

1/17/2020
Date/Time Opened

Record Count

Escalated Cases by Account

Record Count

| | 0 | 0.2 | 0.4 | 0.6 | 0.8 | 1 |

Get Outside Suppliers (...   1

River Mountain Outfitte...   1

Trail Expert Co. (Sample)   1

Account Name

Salesforce Helped Make Informed Decisions, Efficient Support, and Data-Driven Sales Growth.

An Indian Over-The-Top Streaming Service offering films, shows, live sports, and original content.

Customer Retention   AI   UI/UX

Outcomes

Improved Decision-Making

- With a comprehensive view of the data through Salesforce Einstein Analytics, decision-makers can make more informed and data-driven choices.

Improved Service Quality

- Salesforce offered customer service capabilities based on automation that allowed organizations to deliver more efficient and effective support.

Actionable Insights

- Salesforce analytics and reporting features helped track sales performance, identify opportunities for growth, and make data-driven decisions.

Solutioning

Challenges

- Managing customer interactions through a centralized platform with data accuracy and relevancy.

- Handling and analyzing large volumes of data from multiple sources can be complex and time-consuming.

- Tailoring Salesforce to meet specific business needs.

Solution Highlight

- Implemented Artificial Intelligence (AI) for predictive analysis to tailor communication and offerings effectively.

- Implemented data warehousing solutions like Salesforce Einstein Analytics to centralize and simplify data access.

- Used Salesforce's declarative customization features and low-code tools like Salesforce Lightning App Builder to simplify customization while reducing the need for extensive coding.

Won Opportunities

48,940
Opportunity Value

☁ **Opportunity Won** - Acme Inc. | Today

% Won Deals

148

30.83% of 480 Won Deals

☁ Gauge using SOQL query - Acme Inc.

Customer Response to Promotions

🔵 1st Anniversary
24.2%

🟢 Dream vision
20.66%

🟠 Fast delivery
16.73%

🔴 Online pvt sale
16.28%

🟣 Happy life
13.17%

⚫ Others
8.96%

☁ Pie chart using SOQL query - Acme Inc.

Top Opportunities by Probability

Vitrucon
95

JujiToo
93

BigHits
92

Sparkles
89

GoPaper
88
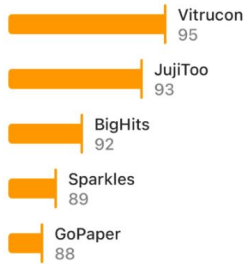
Probablity | Opportunities

☁ Top opportunities by probablity - Acme Inc.

Won Deals Trend

14,556
USD
06 Jul

↗ 18,124 30 Jun
↘ 1,554 03 Jul

☁ Named line graph use... - Acme Inc.

Sales Month Density

M	T	W	T	F	S	S
1	2	3	4	5	6	

Leads this Week

345
Leads
↓ 11.31%

Deal Status

Opened
Vitrucon corporation deal

Built a reward engine module on Salesforce.

A Cloud-Based Reward Management System With Local And Global Fulfillment Capabilities.

Automated Analytics   UI/UX   Data Management

Outcomes

Loyalty Programs Integration

- Salesforce offered robust integration capabilities that allowed to seamlessly connect the loyalty and incentive programs with external partners and reward providers.

Automated Analytics

- Salesforce helped track and analyze user engagement with reward programs provides organizations with valuable insights.

Unified Data Management

- Salesforce provided a unified platform for managing customer data, including their participation in loyalty and incentive programs.

Solutioning

Challenges

- Integrating loyalty and incentive programs with external partners and reward providers

- Efficiently tracking customer data and various programs across multiple locations.

- Tracking and Analyzing User Engagement Across Varying Reward Programs

Solution Highlight

- Utilized Salesforce's robust API capabilities to establish seamless connections with external systems.

- Leveraged Salesforce's robust data and inventory management capabilities to ensure up to date database.

- Salesforce's flexibility allowed for the creation of program-specific metrics and reports.
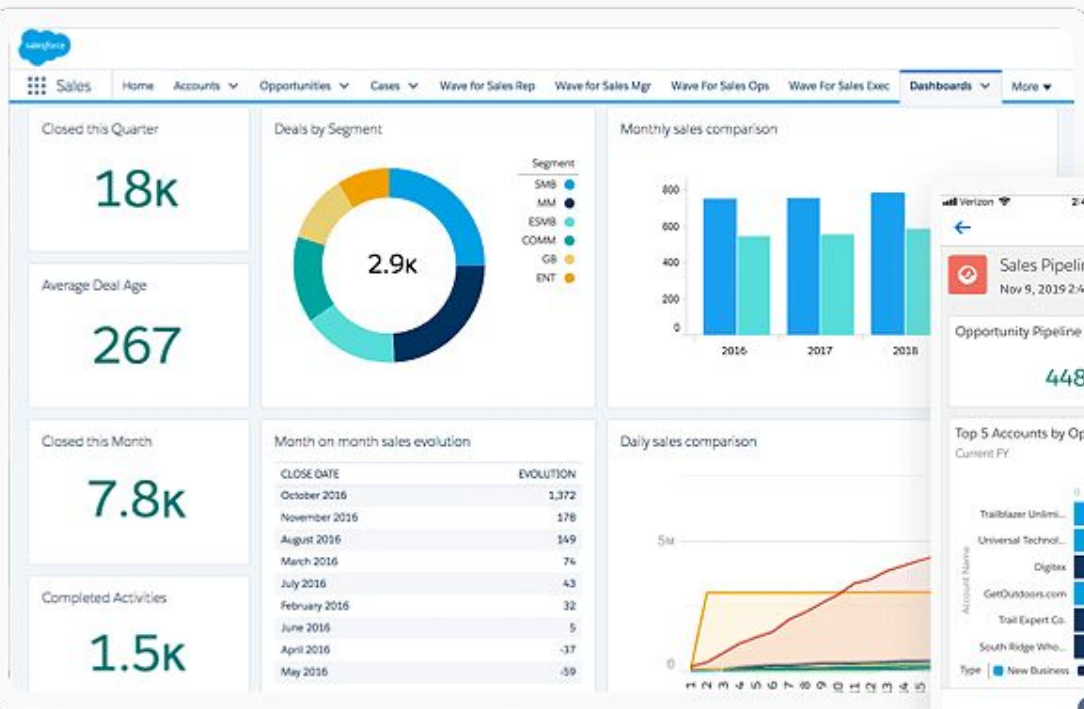
Utilized Salesforce for reporting and automation, improving user experience.

An insurance company owned entirely by its policyholders.

Employee Management   Salesforce   UI/UX   Data Security

Outcomes

Insightful Reporting

- Utilized Salesforce reporting capabilities to create detailed reports and dashboards.

Automation

- Salesforce automated manual tasks, enabling the team to focus on strategic tasks rather than repetitive administrative work.

Enhanced User Experience

- Salesforce helped create an interface for new User Accounts and Profiles within the role hierarchy, guaranteeing a user-centric experience.

Solutioning

Challenges

- Managing vast datasets for detailed reports is complex.

- Manual processes were prone to errors, affecting data accuracy and business operations.

- Meeting specific user interface requirements for different profiles and roles within the organization was intricate.

Solution Highlight

- Salesforce created reports to specific needs, simplifying complex data and ensuring relevance.

- Utilized Salesforce automation tools to automate manual tasks, reducing human intervention.

- Implemented role-specific customization to provide a personalized experience, addressing the unique requirements of each role.

Center Dashboard

Premium of Policies Sold
USD 203,439.38

Policies Sold
68

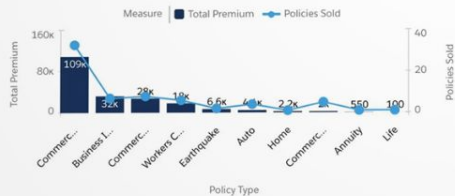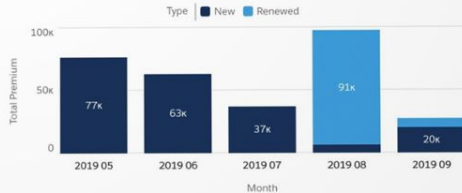Premium of Policies Renewed
USD 98,282.62

Policies Renewed
19

Lead Conversion Ratio
0%

YTD

Sales Performance by Policy Type
Measure ■ Total Premium ●— Policies Sold
YTD

Total Premium — 160k, 80k, 0
Policies Sold — 40, 20, 0

109k, 32k, 28k, 19k, 6.6k, 4k, 2.2k, 550, 100

Policy Type: Commerc..., Business I..., Commerc..., Workers C..., Earthquake, Auto, Home, Commerc..., Annuity, Life

Monthly Sales and Renewals
Type ■ New ■ Renewed
YTD

Total Premium — 100k, 50k, 0

77k, 63k, 37k, 91k, 20k

Month: 2019 05, 2019 06, 2019 07, 2019 08, 2019 09

Renewals Performance by Policy Type
Measure ■ Renewed ■ Yet to be Renewed
MTD

Renewed, Yet to be Ren... — 600, 400, 200, 0

Policy Type: Auto, Annuity

Claims Settled and Average Settlement Time
Measure ■ Average Claim Settlement Time (Days) ●— Number of Claims Settled
YTD

Average Claim Settlemen... — 6, 4, 2, 0
Number of Claims Settled — 4, 3, 2, 1, 0

4, 6, 3

Claim Type: Auto, Life, Home

Left Dashboard

-67.58%
Claims

60.00%
Policies

02 Ongoing
06 Previous
15 Ongoing
09 Previous

Claim Details

Claim Date	Policy Type	Claim Amount
2 July 2022	Life Insurance	$45000
12 July 2022	Accident Insurance	$196000
18 July 2022	Auto Insurance	Customer 1

Right Dashboard

YTD

Customer Feedback
— Auto Insurance
— Casualty Insurance
— Health Insurance

8, 6, 4, 2, 0, -2

Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-22

Avg. Days to Settle a Claim

Policy Type:
Health Insurance
Auto Insurance
Life Insurance
Reinsurance
Property Insurance
Casualty Insurance

0, 10, 20, 30, 40