



Persistent + Salesforce®

Stretching the horizon to unleash business potential

For 18+ years, Persistent has partnered with Salesforce to help global organizations across industries accelerate business transformation.

Persistent is a leading Salesforce partner with extensive implementation and consulting experience across industries. Our boutique approach with enterprise scale allows you to speak with leaders in 18 countries and yet expect local expertise that is highly relevant to your geography.

Persistent is uniquely positioned to provide end-to-end capabilities across the entire Salesforce Cloud portfolio. This allows us to not only select and implement the right clouds but also to implement customized solutions beyond the standard stack enabling business transformations for our global clients, with a strong focus on driving growth, profitability and value.

This document provides examples of how we help our clients maximize the ROI of their Salesforce investments and adjacent technologies, while enabling the speed and agility needed to manage high performing businesses.

Persistent remains uniquely positioned to offer end-to-end capabilities across the Salesforce cloud portfolio, and we’re also creating new industry use cases with Salesforce’s Einstein GPT platform. We have been recognized as a Leader in the Salesforce Ecosystem Partners 2023 ISG Provider Lens™ Study, and we recorded a 30% year-over-year increase in Salesforce certifications this past year

persistent.com/salesforce →

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Software & Hi-tech

Unified territory
management to
capitalize on revenue,
growth and partnership
opportunities



The client is one of the industry’s
premier consumer electronics
companies and one of the world’s
most recognizable brands with
leading positioning in smartphones,
laptops, wearable devices,
applications, fintech and other areas.

Software & Hi-tech

US

The Challenge

Successful global companies rely on Territory Management processes to manage sales, accounts and growth accurately and effectively. Our client relied on multiple legacy systems for territory and account data, with multiple manual processes and low visibility into historical data for insights and account planning. This made overall system management extremely difficult, constrained the client’s territory planning and modeling capability, and impacted overall efficiency, productivity and sales activity.

The Solution

Persistent worked with the client to utilize Salesforce’s Enterprise Territory Management to create a single source of the truth for sales territory and account data, with the platform housing master data for accounts and sales coverage planning, eliminating data duplication or manipulation. The platform is designed to allow for audit logs on territories, accounts and user assignments, with automated and manual assignment functions available.

With this new solution in place, users can take advantage of quickly created “what-if” scenarios for territory modeling using the Territory Planning tool, as well reduced complexity in managing territory assignments.

The Outcome

To date, more than 1,000 users are utilizing the solution developed by Persistent and Salesforce for improved Territory Management — based on initial success in two regions (US and Canada), the solution was implemented in eight additional regions. Users can create, design and assign territories in a logical and scalable manner, providing a more holistic approach to effective sales and account assignment and coverage.

In addition, the solution provides users with new capabilities in tracking, reporting, historical data analysis, ROI analysis of territory performance against a set of pre-determined parameters or thresholds (revenue, growth, activity, etc.) across 10 regions and more than 200 territories. The solution has generated an increase in sales, a decrease in overall costs, a savings in time required to manage territories and accounts, and a substantial improvement in customer and territory coverage.

Mulesoft

Sales Cloud

Strengthening partner relations with Salesforce CRM and experience cloud

Creating Engaging Partner Experiences and Collaboration Through Integrated Data and Management

Software & Hi-tech
US



The Challenge

Our client struggled with managing partner relationships due to a mix of multiple web applications and manual processes. Collectively, this hampered effective communication and collaboration for the client, its partners and their end customers, with a disjointed and disappointing user experience that impacted efficiency and potential revenue from leads, opportunities and deals.

The Solution

Persistent and Salesforce worked together with the client to create a centralized, streamlined and efficient experience for the client’s partner ecosystem, with a solution built using Salesforce CRM and Experience cloud. The new partner portal provides a single gateway to a suite of capabilities and services that will drive better engagement between the client and its partners.

Services will be tailored to partners according to their specific needs and relationships with the client, so the client and individual partners can remain aligned on their joint goals and strategies, driving better partner engagement and ultimately opening up new opportunities for revenue growth. The portal will evolve over time, adding new services and capabilities according to partner needs and market trends, and all built on Salesforce’s scalable infrastructure.

The Outcome

With a single front door for partners, the client is already experiencing a substantial rise in partner engagement, with plans to improve the partner onboarding process with centralized data management, streamlined

lead management and lead SLA processes to help with new business generation or expansion of current business, and provide access to more accurate in-time reporting and analysis through dashboards and tools.

Mulesoft Experience Cloud

Creating a centralized command center to improve collaboration on sales activities

The client is one of the industry’s premier consumer electronics companies and one of the world’s most recognizable brands with leading positioning in smartphones, laptops, wearable devices, applications, fintech and other areas.

Software & Hi-tech

US

The Challenge

Sales data and information must be integrated and connected in a way that allows for optimal management, analysis and action among users. For our client, sales-related information was distributed across different systems, denying users of a seamless experience with a lack of proper data insights and personalized user interfaces. These systems also did not provide for integrated reporting or support for local languages.

The Solution

Persistent and Salesforce collaborated with the client to create A360 for End Customers, a command center where key account information converges and serves up curated persona-based views to analyze business and drive actions to drive revenue and growth.

The solution provides more extensive insights into various sales accounts and creates milestones and notifications

within various business processes so users can be made aware of important account actions and occurrences. It also employs embedded dashboards to visualize aggregated CRM analytics data within Salesforce, and component visibility to provide better and specific contexts to users and channel partners, with configured multi-language support for user experiences.



The Outcome

Working with our client, Persistent and Salesforce created a command center that serves as single source of truth so users can easily access data from various sources including sales, sales finance, programs and operations, as well externally public-facing data. It improves collaboration on sales activities by providing visibility to cross-functional initiatives, status checks and corresponding outcomes.

The solution provides a single tool for sales leads to manage daily, weekly and quarterly sales processes and actions, and gives sales leadership and teams contextual information and insights on activities and performance — all of which drives growth initiatives and better user experiences.

Mulesoft Sales Cloud

Enhancing customer
experience with
centralized CRM
for Australian home
appliances brand

Breville

Founded in 1932, Breville delivers best-in-class kitchen appliances to over 70 countries worldwide.

Software & Hi-tech

APAC

The Challenge

To enable real-time visibility into global operations and enhance customer experience through a centralized CRM system and live chat solution.

The Solution

Persistent leveraged Salesforce to set up an integrated, one-stop solution that provides a 360-degree customer experience leading to faster support, better service and eventually, more business.

The Persistent team implemented Salesforce Service Cloud to improve service process efficiency and boost productivity of Breville’s call center agents. Using Lightning Service Console, support agents are able to anticipate what customers need and hence manage cases faster.

The solution tracks customer complaints received through multiple channels — web, social, phone, and manual — and assigns them to respective regional support teams. It also equips service agents with tools to create and handle cases from comments received on Breville’s social media channels.

Emails that the support teams receive are also auto-converted into cases and resolved quickly.

Persistent also enabled a Live Chat window that allows customers located across four continents to interact with Breville support agents for resolving issues they face.

Persistent also created partner communities for retailers and service centers to facilitate an effective medium of communication between the client and its partners. Communities also helped in making self-help tools available to third party vendors and service repairers.

By leveraging Salesforce AppExchange, integration with multiple carrier services was possible in line with the brand’s strategy of delivering innovation based on customer insights.

The Outcome

With end-to-end service cycle visibility, Breville can connect with customers across all locations through a single environment. Seamless, multi-channel customer support has enhanced

user experience and resulted in an exponential increase in the brand’s digital presence. Intuitive, user-friendly customer support system has improved service turnaround time and agent productivity.



Service Cloud



Accelerating time-to-market with seamless omnichannel experience for US multimedia leader

For over 30 years, this client has been a leading provider of software and integrated solutions for audio and video content creation and management, catering to the entire value chain in the global media industry.

Software & Hi-Tech

US

The Challenge

To deliver seamless omnichannel experience for eCommerce customers through a scalable, reliable and flexible B2B and B2C e-commerce platform, providing 360-degree customer view.

The Solution

Persistent leveraged Salesforce Commerce Cloud and Community Cloud to unify user experience across different B2B and B2C customer touchpoints through an improved and unified responsive design UX.

This resulted in comprehensive support for e-commerce functionalities like storefronts, product bundles, pricing, promotions, service orders, payment gateway, checkouts, etc. Using flexible configurations like multi storefronts, multi-language translations, and multi-currencies, the Persistent team was able to simplify processes, personalize buying experiences, and drive conversions.

Persistent helped the client deliver seamless omnichannel experience with guided selling and 360-degree view of customer data by integrating processes and data. The client could easily deliver connected and cohesive customer experience from product discovery to product delivery by leveraging a single source of truth.

The Outcome

Salesforce Sales Cloud and Commerce Cloud implementation provided bulk ordering support, increasing sales revenue up to 40%. The client enhanced customer communication services and achieved 25% reduction in customer service channels like phone or email for placing orders. By enabling new products and SKUs with bundles, pricing and promotions, the client was able to accelerate time-to-market and adapt to changing customer demands.

Commerce Cloud

Community Cloud

Service Cloud

Sales Cloud

Retail



Enabling integrated customer support management with global multi- channel processes

Retail

EU

A well-known German international discount retailer chain, which operates a huge number of stores across Europe and the United States, has an internal discounter group that introduced a supermarket loyalty card via an app that must be integrated with a broader customer loyalty program.

The Challenge

Our client launched a loyalty card program utilizing on-premise tools that suffered from performance and scalability issues, and that were unable to provide deeper integration into marketing data sources for the launch of a more expansive customer loyalty program. In addition, the client's international growth resulted in an increasing number of support

The Solution

Persistent and Salesforce collaborated with the client to introduce enhanced case management processes for its EU and US market support organizations, with an eye toward leveraging Salesforce's CRM functionality for better synergies between the customer support organization and the customer loyalty program.

The Outcome

The solution has resulted in enhanced integration between CRM systems and tighter connections between the loyalty card and broader loyalty programs, enabling more effective and accelerated customer service, and greater transparency in service management. Persistent and Salesforce worked with the client to fully implement Salesforce Service Cloud and Service Console, with

cases each year and created a need for self-service functionality. The client wanted a cloud-based solution that would provide the required scalability and maximize its extensive Salesforce investments (which includes Service Cloud, Digital Engagement, Community Cloud, Einstein Analytics and Marketing Cloud).

The solution includes enhanced case routing and assignment for support issues based on prioritization rules and processes, and provides faster information access to first-level customer support agents. The partners also worked together to create a user-friendly customer community and self-service portal based on knowledge articles and solutions, which allows for faster user resolutions.

integrations between Service Cloud, the customer community and Marketing Cloud, leveraging the discounter's global standards while allowing for customized configurations for specific countries. The solution also contains processes to fully anonymize personal data according to GDPR standards and user requests, and an integrated store locator.



Marketing Cloud

Service Cloud

Community Cloud

Banking, Financial Services & Insurance

Large scale digital transformation of lending program for a leading commercial bank in India

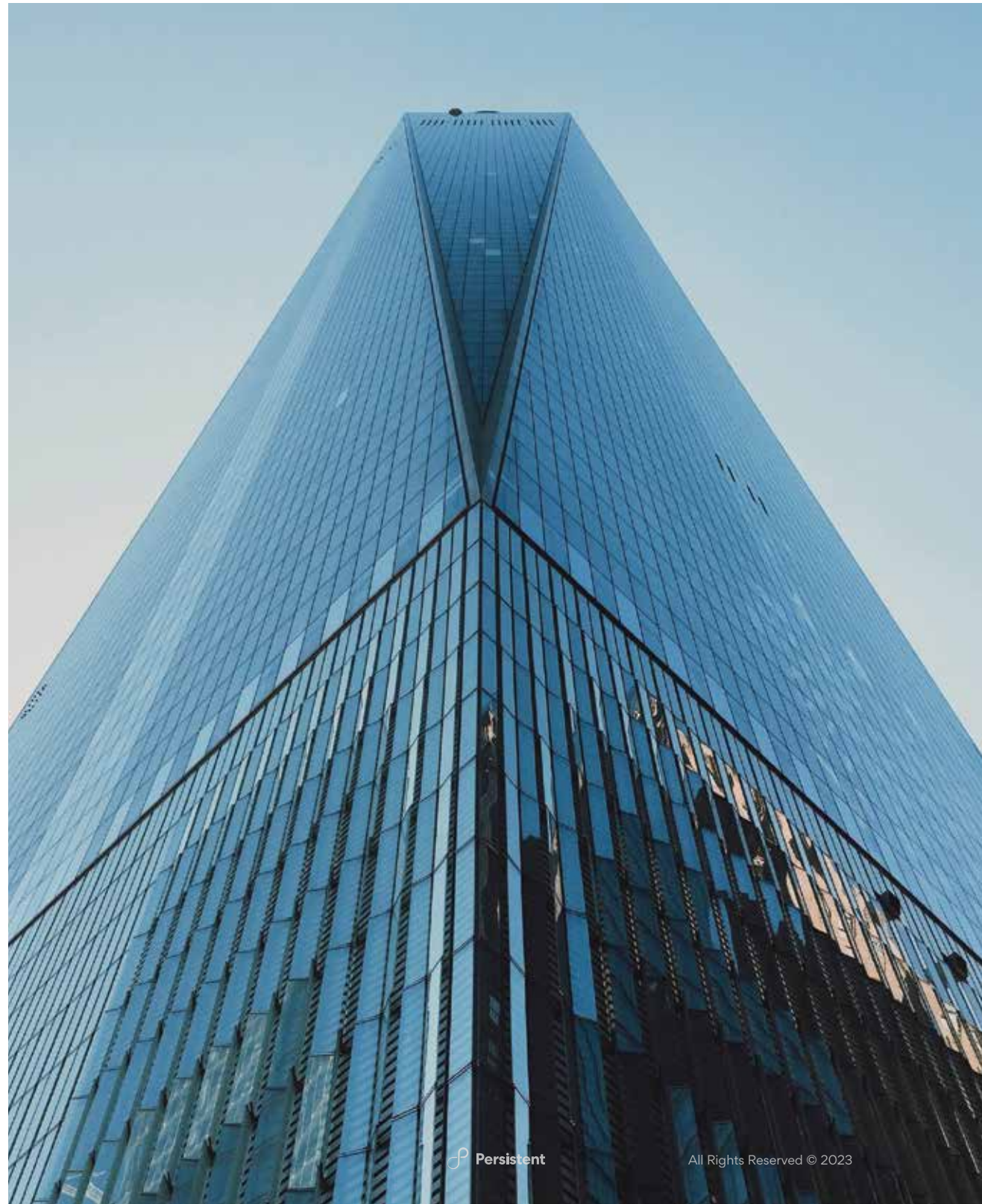
The client is a leading Indian bank currently engaged in multiple LOBs, including retail and commercial lending and banking for over 7 million customers.

BFSI

APAC

The Challenge

To reduce loan disbursement turnaround time by replacing existing, manual, and paper-based process with automation and create user-friendly lending journeys with low-code applications.



The Solution

Persistent helped the client select Salesforce to replace their legacy fragmented IT systems landscape. This allowed the client to build next-gen solutions for realizing their vision of releasing multiple products while minimizing time to market.

By leveraging Salesforce's low code capabilities and workflow-driven architecture, Persistent built extensible lending journeys and enabled seamless user engagement across the complete lending lifecycle.

Persistent helped in eliminating existing rigid processes by integrating with third-party products using different mechanisms like Web Services/ SOAP/REST. This provided the much-needed agility to launch new

products, release updates or make changes to existing products.

Realizing that the UI of the client's existing IT system was difficult to navigate, Persistent executed Lightning platform migration to provide a smooth user experience. By using Salesforce's Omnichannel and Live Agent features, cases and verifications were routed to field agents in an efficient and automated manner, improving efficiency and reducing overheads.

To satisfy the client's need for automation and change management, Persistent successfully leveraged proprietary tools and accelerators for automation and CI/CD implementation.

The Outcome

The client was able to achieve significant reduction in loan approval TAT reduction — from five days to five minutes. The average time taken to launch new loan product was reduced from 24 weeks to 12 weeks. The Salesforce platform integration with multiple systems enabled customer 360° view

leading to cross-selling of additional products. The platform also allowed the client to handle increased loan transaction demand during peak seasons. Based on initial success with a few loan products, the client implemented the Salesforce powered Loan Origination System across 16 different business lines.

Sales Cloud

Financial Services Cloud

Mulesoft

Service Cloud

Community Cloud

Leading Indian
Financial Services
Company Revamps
Customer
Experience
with Salesforce

The client is a leading Indian diversified financial service providing multiple financial services, including business loans, personal loans, gold loans, medium and small enterprise financing, microfinance, and financial advisory services.

BFSI
APAC



The Challenge

The client was challenged by the lack of a unified customer view due to a fragmented landscape of disparate systems resulting in data inaccuracies. Manual and broken processes added to operational inefficiencies and prevented them from responding to ever-changing market dynamics. All these ultimately prevented them from achieving their ambition to scale 3-5-10x, improve customer experience and drive business growth.

The Solution

Persistent helped the client develop an integrated data platform that would serve as a single version of truth and enable data analytics and decision-making. The solution allowed the client to reimagine Relationship Manager (RM) journeys, onboarding, and omnichannel experience. It provided unified reporting with advanced visualization capabilities that allowed the client to deliver consistent and personalized customer experiences. Persistent also enabled the client to achieve business objectives by leveraging the API platform, integrated DevSecOps, and public cloud infrastructure.

The Outcome

This digital transformation initiative resulted in numerous benefits for the client. Digitizing wealth management operations helped RMs to oversee client portfolios, monitor investment performance, and process requests through accessible digital platforms easily. On the other hand, data-driven insights powered by AI and machine learning enabled wealth managers to offer tailored advice and create customized investment portfolios aligned with individual financial goals and preferences.

Automation and reduced paperwork translated to cost savings for the company. Additionally, digital platforms enabled more affordable access to wealth management services through lower fees and commissions. Real-time access to investment performance, fees, and financial data fostered transparency, empowering customers to make informed decisions and build trust with their wealth management provider. The client also enabled advanced encryption and authentication to bolster security, assuring customers of protection against fraud and cyber threats during financial transactions.

Financial Services Cloud

US-based
financial services
company
improves user
experience with
Salesforce

Apart from offering commercial banking services, the client has ventured into renewable energy financing to improve the environment for generations to come.

- BFSI
- US

The Challenge

The US-based client wanted to enter the Renewable energy segment. They were looking for a solution to implement solar loan/lease processes. The client needed a system that would facilitate interaction between multiple stakeholders, including the solar contractors and the bank underwriters, to contribute to the loan creation process, involving integrations with credit data providers, loan management systems (Jack Henry), Wolter Kluwer and other key third-party organizations. The client wanted to accelerate the turnaround time (TAT) for loan processing and deliver within a few minutes.

The Solution

Persistent collaborated with the client to develop a very adaptable version of the application to fulfill their unique requirements. We advocated the use of Sales Cloud and Experience Cloud, which would help the client save expenses associated with login-based licensing. The challenge of integrating with Jack Henry was addressed by preparing XML request and providing solutions for SOAP API limitations. We automated manual activities by implementing Salesforce key features and Persistent LOS accelerator. We ensured that the solution also included the provision of reports and dashboards for analytics.

The Outcome

The solution provided a unified tool for sales leads to manage sales processes and actions. It enabled the sales leadership and their teams to contextualize information, gain insights into activities and monitor performance. By automating existing time-consuming manual processes, the client reduced the overall turnaround time for loan approvals from hours or days to minutes. All this improved productivity and led to a better user experience.



Sales Cloud



British neo bank delivers a real-time and seamless digital banking experience with Persistent & Salesforce

The client is one of the premium banks in the UK offering savings accounts, property investment loans, and handpicked lifestyle services to over 4.8 million customers.

BFSI

UK

The Challenge

The client wanted to build a digital banking platform using Salesforce Financial Services Cloud (FSC) for deposit and loan origination that would help them meet the rising expectations of today's customers. The platform architecture would also include a loan and deposit management system and an AWS-based integration layer to connect internal and external systems.

The Solution

Persistent built a unique microservices-based architecture by combining Salesforce, AWS, and Mambu. We configured the Salesforce FSC for sales as well as service operations of the bank. Persistent leveraged a mortgage-focused data model of FSC along with some exciting features such as Action Plans, Financial Accounts, Document Tracking and Review, Guided Loan Application Flows, etc.

We provided a Flexi Framework for the lending journey and implemented Salesforce Marketing Cloud for client notification and various types of microservices. Persistent also implemented the VoNW feature which involved integration with multiple 3rd party systems.

The Outcome

With a 360-degree customer view, the digital platform enabled the bank's customers to enjoy a real-time banking experience from any location and on any device such as tablets or mobiles. The two-factor authentication feature enhanced security and provided a safe banking environment for customers.



Financial Services Cloud

**American fintech
major streamlines
processes and
tools to accelerate
opportunity
creation**

The client is one of the leading tax solutions providers in the US and EMEA region, offering financial, accounting, tax preparation, inventory management, and POS software solutions to over 100 million customers across nine countries.

BFSI

US

The Challenge

Embracing a major shift to cloud strategy, the client decided to transition all product lines to a SaaS model. This allowed for bundling allied products for sales but managing multiple product lines posed new challenges. Each product line had its own customer care channel with unique toolsets, making it difficult to identify customers across different lines.

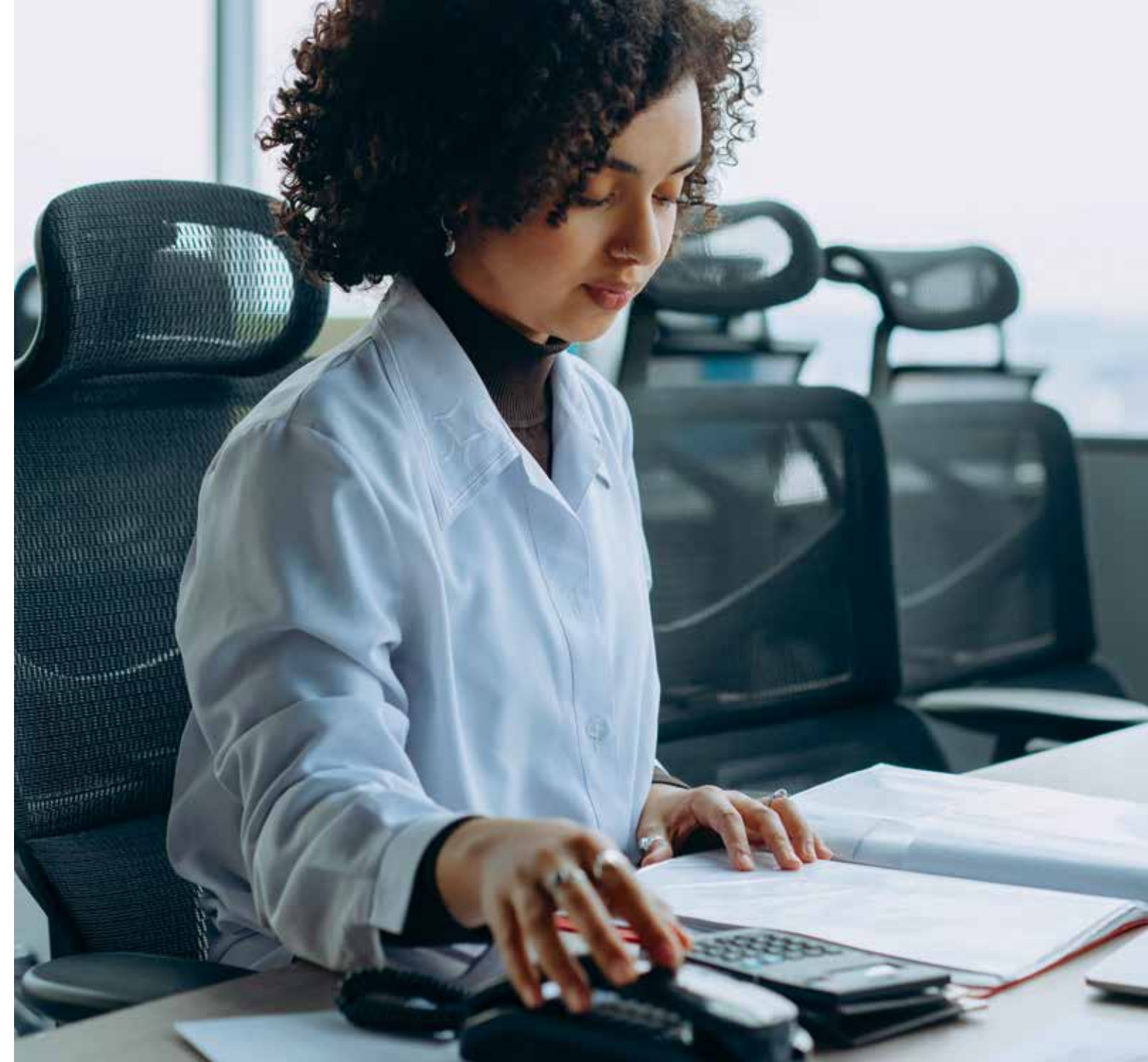
The lack of a centralized knowledge management tool led to unproductive time spent switching between tools. Also, surveying end customers from Lead or Opportunity in Salesforce Lightning Design System (SLDS) required manual intervention at multiple points in the system.

The Solution

Persistent successfully addressed the client's challenges by focusing on tools rationalization and streamlining their toolset. By strategically removing or replacing over 220 tools, we achieved 33 tools across all product lines.

Persistent provided seamless integrations across toolsets using Visual Force (VF) components and SLDS pages. This resulted in a UI that closely resembled SKUID and a single-entry experience. Custom metadata types facilitated easier deployment of changes.

To help the client optimize workflows and personalize customer experience, Persistent implemented Customer 360 that offered a single, unified view of their customers. This allowed the client to deliver tailored customer experiences across all touchpoints, strengthen customer relationships and build brand loyalty.



The Outcome

By avoiding contact switching and integrating discreet systems into a single Agent console, the client reduced the call time from 45 to just 5 minutes. Implementing a process to clone quotes while creating multiple quotes for a single account reduced time from 20 minutes to 2 minutes.

This resulted in 95% time-saving in opportunity creation. Also, the number of clicks required to attach quotes to customers' contacts decreased from 25 to just 5. Finally, eliminating the need for sales consultants to exit the system increased productivity and operational efficiency.

Sales Cloud

Communications, Media & Telecom





8x8 is a global communications provider with more than 2M business users, integrating voice, video, chat, contact center, and enterprise API solutions into one secure, reliable Cloud-based communications platform.

Modernization of lead to cash journeys

Communications, Media & Telecom

US



The Challenge

With real-time business intelligence and analytics, 8X8's platform empowers customers to create personalized user experiences, driving customer satisfaction and business growth.

8X8 had a lot of complex business applications, having a large number of integrations with backend systems and app exchange products. The lead and opportunity ingestion was a bottleneck with scores of managed packages and customizations done over many years. The partner selling experience deviated from the core Configure Price Quote (CPQ) experience, increasing the cost of fixing and updating the products' CPQ. The client wanted to streamline the overall process and build capabilities that define modern PaaS services, including quoting and billing.

The Solution

Persistent implemented a process with design authority reviewing the apps and integrations, exercising governance on integration strategy, and decommissioning the unneeded apps and integrations. We refactored the code to clear the technical debt and exposed APIs to fetch orders and line items. We improved the billing by implementing features such as cost centers and asset linking with locations.

Persistent transformed the CPQ offerings and processes to support, modify, upgrade, downgrade, partially cancel, renew, or undertake any amendments preventing revenue leakage in manual adjustments and overrides. We also implemented omnichannel and case deflection by integrating chat applications.

The Outcome

The transformation improved the health of the overall salesforce environment and reduced row-locking over a period of time. There were fewer instances of orders being stuck in processing as well. 8X8 benefited from a more comprehensive quoting process flow with a significant

increase in deal conversion. Additionally, the client was able to reduce the revenue leakage considerably, as there weren't any arbitrary manual adjustments. The customer support executives had a full view of agent capacity and backlog and could manage them more efficiently.



Experience Cloud

Service Cloud

Sales Cloud

Industries CME CPQ

Healthcare & Life Sciences



The Johns Hopkins Hospital is a leading US-based non-profit medical institution that aims to improve community health by setting the standard of excellence in medical research, education, and patient care. With over 2400 full-time attending physicians, the hospital handles over 43K annual inpatient admissions and 94K+ emergency visits annually.

The Challenge

The Johns Hopkins Hospital wanted to develop a social collaboration platform to help patients manage their goals by involving relatives, friends, and volunteers in their care. The core objective of the platform was to provide a high-level view to the care coordinator to manage patient care efficiently.

A leading hospital improves patient care at lower costs with a social collaboration platform

The Solution

Persistent designed, developed, and deployed Salesforce community for The Johns Hopkins Hospital that allowed patients, caregivers, volunteers, and relatives to log in and manage goals and objectives. Additional functional modules and features were deployed, including patient appointments, checkup schedules, and event reminders, to the platform to provide a holistic experience for all stakeholders.

Persistent developed a service cloud console to allow the care coordinators to track and categorize patients and view their clinical and demographic

information. The console was also helpful for care coordinators to map volunteers with patients to help them accomplish their set goals and tasks. The board feeds feature was deployed to upload motivational articles, videos, and images to enhance collaborative efforts and live chat among all stakeholders.

Additionally, Persistent implemented an SMS dispatch feature into the platform using Twilio. Salesforce Chatter was used to enable real-time interaction and communication between care teams.

The Outcome

The social collaboration platform has helped The Johns Hopkins Hospital ensure faster patient recovery at lower costs. The care coordinators now had a birds-eye view of the care administered to patients and it helped in early intervention and care thereby resulting in more effective and holistic healthcare for patients. The hospital has significantly improved the quality of care delivered to its patients.



Healthcare & Life Sciences

US

Service Cloud

Experience Cloud

Large pharma company gains a 360-degree view of patient data with an integrated platform

The client is a US-headquartered publicly traded biopharmaceutical company. Its mission is to discover and deliver innovative medicines to solve today’s serious health issues and address tomorrow’s medical challenges. It strives to impact people’s lives across several critical therapeutic areas, including immunology, oncology, neuroscience, eye care, virology, women’s health, and gastroenterology.



Healthcare & Life Sciences

US

The Challenge

The client was dependent on disparate platforms to develop and launch separate and new drugs. This resulted in siloed data which delayed the innovation process and time to market for new drugs. All those platforms were expensive and highly reliant on several third-party applications. The client had multiple systems with no integrated view of patient information. This resulted in a lack of proper coordination in patient management for the client’s outreach team. In line with their recent merger and acquisition activities, the client wanted to optimize business processes with the right technology solutions.

The Solution

Persistent developed an integrated platform on Salesforce to enable the client in launching multiple drug types from a single platform.

To make the integrated platform robust and comprehensive, Persistent leveraged the power of Salesforce Sales Cloud and Salesforce Service Cloud and added several operationally imperative features. The list of features included benefits investigation and verification, product, order, and territory management, patient assessment and survey, intake and knowledge management, an online reimbursement hub, and a multi-channel platform including not only digital but a telephone platform as well.

The Outcome

The solution reduced the existing 11 platforms to a single, integrated one for multi-drug launches. With this, the biopharmaceutical company now has a 360-degree view of patient data. The platform has also helped the client launch seven drugs and one-touch automation for intake and contact centers thereby reducing dependency on third-party products.

Service Cloud Sales Cloud

Improving user experience with automation and cloud for leading renal care service provider in the US

For over 40 years, the client has been a leading provider of kidney dialysis services, with a network of over 2,000 outpatient dialysis centers in the USA.

Healthcare & Life Sciences

US



The Challenge

To cater to new payer contracts, keep up with evolving patient care needs and leverage automation to enhance patient visibility by replacing manual operations with Salesforce implementation.

The Solution

Persistent implemented the Salesforce Health Cloud to help the client overcome multiple challenges arising out of manual operations and lack of configurability of the legacy system.

The implementation included aligning the enrollment process to make patient visibility configurable. This would enable business owners to add and/or modify payers’ information and other related enrollment process parameters.

To eliminate assigning patients in the queue manually, the queuing logic was automated and made configurable. The Persistent team also made the patient category list configurable to prioritize patients for calling, based on attributes which was critical for patients with kidney

Persistent also deployed the Salesforce Lightning Service console for enhanced user experience, reduced clicks and improved productivity. This allowed the client to keep up with the evolving requirements based on payer contracts and the changing needs of patient care.

The Outcome

Implementation of Salesforce Health Cloud boosted enrollment within four months and 40 enrollments were completed in the first week of implementation. This was possible because of the improved and real-time visibility of calls. Optimal staffing and connectivity enabled better utilization of resources for specific programs.



Health Cloud



**Building a
COVID-19 testing
e-commerce
portal for a leading
laboratory in the US**

The US-based client is a leading full-service specialty laboratory, offering a wide range of digitally-enabled, safe, and HIPAA compliant diagnostic solutions for healthcare consumers, providers, government agencies and private organizations.

Healthcare & Life Sciences

US

The Challenge

To support high test order volume as a result of growing demands for COVID-19 testing across the US by building a COVID-19 testing e-commerce portal.

The Solution

With the onslaught of the COVID-19 pandemic, the client witnessed an increase in test order volume. Persistent supported them in addressing the changing needs of the business by implementing Salesforce Health Cloud and Community Cloud that would provide them with the much-required flexibility and scalability.

They built the end-to-end patient enrollment, e-commerce, customer service and test results experience on Salesforce B2B Commerce and Community Cloud. The platform was scalable enough to provide multiple storefronts to service multiple partners for mass drive-in or on-site testing.

Persistent also provided support to scale the web portal for multiple partners like NFL, Cruises, Airlines due to growing needs of COVID testing being done all over US. Appointment scheduling based on capacity and location proximity led to a significant increase in efficiency.

The Outcome

Salesforce implementation resulted in 100% transparent, secured and HIPAA compliant test results. The unified experience and accurate appointment scheduling improved

customer satisfaction and led to an increase in revenue. With enhanced customer experience, the client was able to acquire new patients and retain existing ones easily.



Marketing Cloud Service Cloud Sales Cloud



Simplyhealth is UK's leading provider of health services and support, serving over three million people since 1872.

The Challenge

Healthcare & Life Sciences

UK

To improve customer experience and foster long-lasting relationships through accelerated digital transformation driven by a Salesforce-powered, consolidated customer 360 solution.



Shaping the future of private healthcare in the UK with best-in-class omnichannel customer 360 platform

The Solution

Commissioned to merge three solutions into one, consolidated Salesforce solution, Persistent completed the 'One Salesforce' project in four key stages, using an agile methodology.

The team first implemented initial 'One Salesforce' and baseline processes by merging Dental and Corporate Health Plan businesses onto Salesforce.

Next, they connected Salesforce Marketing Cloud and built

personalized customer journeys to drive customer engagement.

This was followed by migrating Consumer Health Plan business to 'One Salesforce', leveraging standardized processes across all business lines including Corporate, Consumer, and Dental.

In the last phase, the team integrated back-office systems to ensure the users had a full 360-degree view of their customers.

The Outcome

These implementations empowered Simplyhealth to execute their new digital strategy by leveraging a centralized platform successfully. The 'One Salesforce' provided a holistic customer view to improve go-to-market strategies and nurture customer relationships. The customer service team can seamlessly access

customer account and interaction history, and this has led to improved customer interactions. Moreover, the marketing team can now offer existing customers additional products tailored to their interests and deliver relevant, personalized and automated marketing journeys to their target audiences, across the right channels and devices.

Marketing Cloud

Service Cloud

Sales Cloud



Established in 1998, CareDX is a leading precision medicine solutions company focused on the discovery, development and commercialization of clinically differentiated, high-value healthcare solutions for transplant patients and caregivers.

The Challenge

To improve workflow management and amplify patient and caregiver outcomes by building a digital front door powered by Salesforce Lightning Console.

The Solution

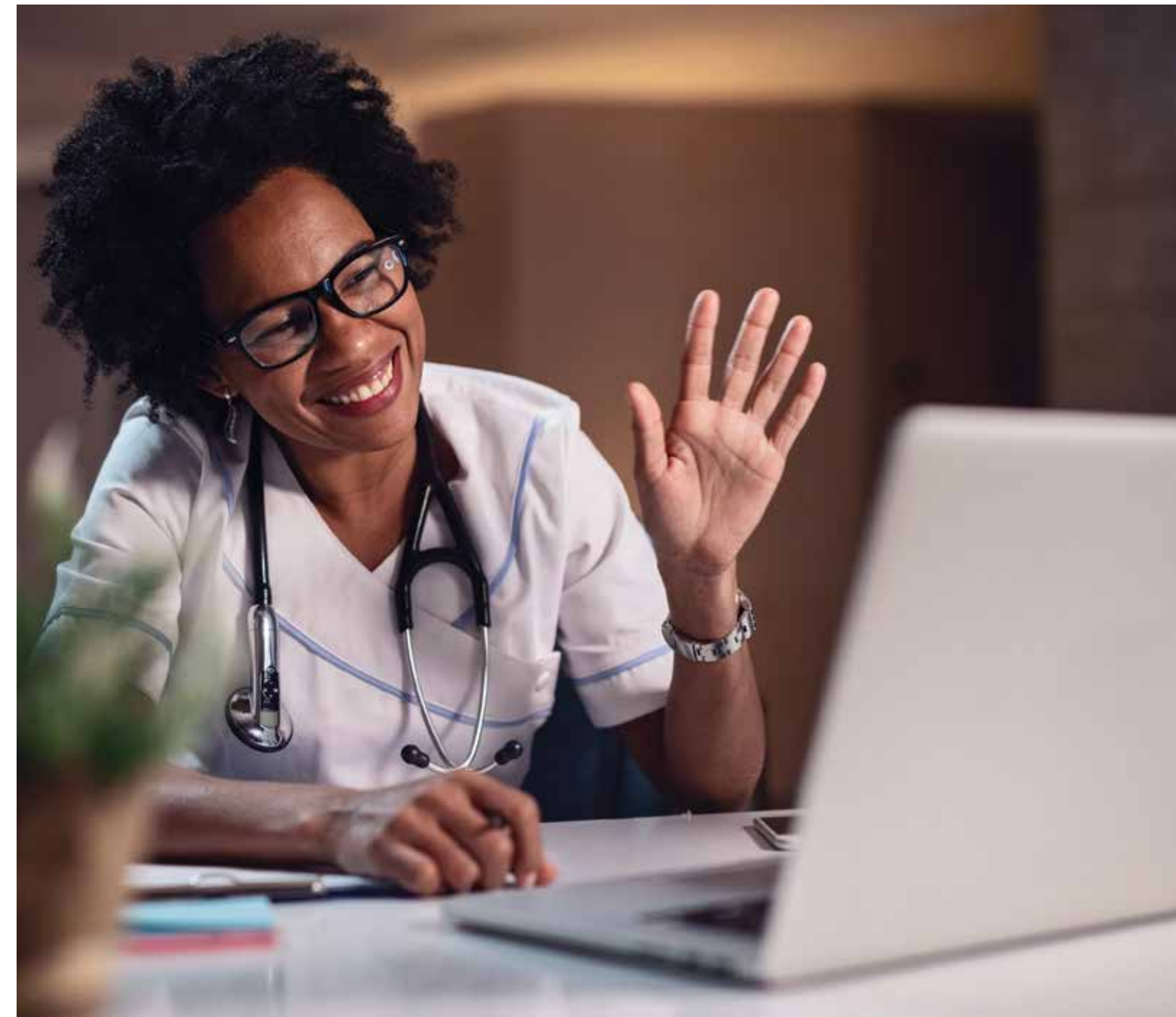
CareDX selected Persistent to help them drive automation and implement an intuitive workflow for various stages of accessioning and order management by leveraging Salesforce Platform.

Understanding that inefficient workflow management was the biggest challenge for the client, Persistent decided to migrate order management and accessioning flow from STARLIMS to Salesforce Lightning Console to enable support for orders, patients and accessioning.

As point-to-point integrations were adding to the risk of cascading

failures, Persistent integrated other systems through MuleSoft to fetch and keep data in sync. Adding custom quick actions to the Console utility bar enabled faster scanning and data capture. Persistent also built highly configurable order search screens using custom metadata for faster order transition.

The team also enabled effective case management using Salesforce out of the box that allowed CareDX to track, categorize, prioritize cases from all channels and assign them faster to improve average resolution time.



The Outcome

The robust Salesforce implementation increased the number of daily accessions from 375 to 1,000 and resulted in a 60% reduction in personnel and license costs. The platform provided the client

with the much-needed scalability to handle new tests offerings and product lines and improved the productivity of resources who could now spend more time on R&D.

Improving patient outcomes with a digital front door for a precision medicine solutions leader in the US

Healthcare & Life Sciences

US

Mulesoft

Sales Cloud

SwanCare

Founded in 1961, SwanCare is a leading provider of integrated care facility and quality services for aged care, retirement living, at home and residential care for the older Australian population.

The Challenge

To efficiently manage lead generation activities and enable opportunity management for potential sales or rental prospects through a cloud-based CRM platform.

**Australian aged
care provider
transforms patient
experiences
with data-driven
insights and
integrated CRM**

The Solution

To better manage SwanCare's relationship with customers and ensure efficient contact management for interacting with potential customers, Persistent replaced their time-consuming paper-based process with Salesforce Sales Cloud CRM.

The Persistent team helped the client migrate all existing data for leads, accounts and contacts into the new CRM so that they could start using the system immediately. The CRM automated contact management to provide hassle-free access to critical customer information and maintain accounts, contacts, and relationships with ease. SwanCare could also track all interaction activities, including calls logged, tasks, property visits and meetings through the new CRM system.

Persistent created multiple web-to-lead forms that helped the client to capture prospects and auto assign them to the appropriate team members. This allowed SwanCare to manage and communicate with new leads through accurate qualification and profiling. The Sales Cloud CRM also helped in opportunity management and sales forecasting.

The Sales Cloud also delivered core reports and dashboards for key metrics within the business. Apart from implementing the new CRM system, Persistent also provided customized onsite training, including report and dashboard training, for end users and administrators.



The Outcome

A 360-degree view of their properties and opportunities linked to them helped SwanCare to capture all leads generated from the website and categorize them easily. With a single source of truth and complete insight

into interactions with potential or resident customers, SwanCare improved care, streamlined customer journeys, and built one of the largest and most integrated aged care communities in Australia.

Healthcare & Life Sciences

APAC

Sales Cloud

Improving patient relationships for India’s leading multi-specialty hospital

Established by a renowned Indian Cardiologist, the client is one of India’s largest private hospitals, catering to over 2.5 million patients annually.

Healthcare & Life Sciences

APAC

The Challenge

The client’s goal was to develop a healthcare CRM tailored for businesses in India and the Cayman Islands. The CRM had to handle patient relationship management, digital marketing, appointment scheduling, knowledge management, performance visibility, patient feedback, post-visit follow-ups, and international sales. Integration with the client’s homegrown electronic medical record (EMR) and other apps was crucial for seamless data exchange. The client aimed to empower healthcare providers with an efficient system to enhance patient care and streamline operations across regions.

The Solution

Persistent collaborated closely with the stakeholders to finalize requirements and develop a high-level solution. The solution comprised various components, including implementing Service Cloud to streamline domestic and international sales processes, optimize contact center operations, and manage patient complaints. Additionally, a Salesforce Marketing Cloud (SFMC) implementation facilitated marketing journeys via email, SMS, and WhatsApp. Integration with the client’s EMR and the in-house Appointment app ensured seamless API connectivity.

The solution provided valuable insights through Process Insights and operational reports while ensuring data security with Salesforce Shield’s PHI data encryption and auditing capabilities. Digital Engagement strategies were employed through channels like SMS, email, and WhatsApp. A tailored Patient Relationship Management (PRM) system was deployed for international patients. Lastly, complaints and feedback management was integrated with BestDoc, serving both inpatient and outpatient departments, to enhance efficiency and improve patient experience.

The Outcome

The Salesforce-powered solution enabled the client to benefit from a 360-degree view of each patient, ensure process consistency and enhance user experience with valuable data-driven insights.



Service Cloud Marketing Cloud

Global sales and service transformation for an American multinational healthcare company

American multinational company specializing in manufacturing and distributing various medical products and services, including IV solutions, infusion systems, medical devices, biopharmaceuticals, and therapies for critical care and renal care.

Healthcare & Life Sciences

US

The Challenge

The primary objective is to optimize the sales process, encompassing all stages, from initial marketing efforts to the final delivery of products.

This includes efficiently managing tasks such as product installation, handling valuable assets, and effectively overseeing the ongoing management of medical devices.

To optimize global sales processes, enhance customer service, and unlock growth potential, the key is seamless data integration across sales and service divisions. This involves supervising assets at customer sites,

addressing device status disparities, monitoring usage, and identifying competitor equipment. Efficient management of device tasks via the platform is crucial, requiring streamlined approvals across hierarchies. The Device Management system further simplifies multi-team approvals while enabling smooth information flow and collaborative workflows between sales and service teams to drive lead generation, capitalize on opportunities, and jointly tackle customer issues.

The Solution

The system offers the capability to view assets installed at customer sites, monitor device status and usage, and directly notify Technical Services through the Application, thus minimizing offline communication.

It introduces an efficient approval process enabling sales reps and managers to request new device installations, replacements, and returns.

Sales and marketing can also seek approvals for sample product requests on behalf of HCPs. Integrating Service data into CX360 empowers sales reps to access relevant information. Moreover, sales reps and clinical support specialists can request and receive approvals for clinical training with HCPs, with training outcomes being recorded in the system, fostering collaboration and efficiency.

The Outcome

The client achieved efficiency, collaboration, and transparency by simplifying device management and approval procedures, consolidating sales and marketing efforts within the client system for streamlined operations, and providing enhanced visibility into

requests tied to specific accounts or contacts. This increased sales, improved efficiency of the sales department's by 20%, and enhanced engagement among Sales Representatives, Sales Managers, and Business Unit leaders.



Service Cloud

Sales Cloud

Leading pediatric health care hospital accelerates service with patient-centric program



The client is one of the top 10 pediatric healthcare providers in the US, offering more than 50 pediatric specialty and subspecialty programs around pediatric health, wellness, and acute care services to over 300,000 patients annually.

Healthcare & Life Sciences

US

The Challenge

Considering that the hospital handled thousands of referrals every month, manual handling of paper-based referral forms added to the workload and increased the risk of errors and delays in the referral process. The complex referral management system required a staggering 70 clicks to schedule a single referral, slowing the overall process and reducing efficiency and productivity.

The legacy system with poor UX led to issues like duplication of referrals and inaccurate appointment scheduling. Inconsistent rules and lengthy processes further complicated the referral management mechanism and added to the staff’s woes as they had to manage a high volume of referrals continuously.

The Solution

The client engaged with Persistent to help them overcome the challenge by automating the referral management process. Persistent implemented a Patient Centricity Program that could handle referrals and appointment scheduling with minimal manual involvement.

For mapping the referral and patient journeys, Persistent conducted digital Greenhouse workshops that streamlined operations. We also rolled out a referral management solution to identify referrals at an early stage based on the patient and specialty. This solution allowed referring provider offices in the community to send messages regarding referrals to the contact center.

The Outcome

Utilizing this solution, the client reduced referral processing time by 75% and streamlined batch scheduling for 50 patients to just 3 clicks. They also experienced a substantial 60% decrease in clicks required for both referrals and workflows.

Through the implementation of a patient-centric program and automation of previously manual processes, there has been a notable decrease in referral leakage. This initiative also reduced call handling durations, enhancing employee productivity significantly.

Health Cloud

Industrial & Manufacturing



Founded in 1990, AGCO Corporation is a global leader in the design, manufacturing and distribution of state-of-the-art agricultural equipment and farming solutions.



The Challenge

To increase process efficiencies, digitize customer service, and reduce time to value for dealers by implementing an intelligent and responsive conversational AI-driven solution.

**Digitizing
customer
service with
conversational AI
and automation
for an agricultural
solutions leader**

Industrial & Manufacturing

EU

The Solution

To help AGCO automate mundane, time-consuming tasks, Persistent came up with an intelligent Conversational AI solution leveraging Kore.ai. This allowed customer support teams to focus on more complex, higher-value interactions.

The chatbot not only uses automation to eliminate the lower value interactions but also provides fast and personalized answers in three languages — English, German and French. This enables the customer support teams at AGCO to provide more efficient service and greater value to their large dealer community.

The Persistent team helped the client identify the 30 most common use

cases, covering a large portion of the most frequently submitted requests to AGCO customer support. These use cases were then compiled into 22 scripts, to cover the initial 30 cases. The team also provided training in low code to AGCO staff so that they are able to add new use cases going forward.

The chatbot supported customer service, technical service and digital e-commerce channels and the bot-driven workflow automation increased business agility considerably. With instantaneous, autonomous, and 24/7 dealer support, AGCO was able to reroute its workforce to focus on more complicated queries and respond to value-added dealer-blocking requests.

The Outcome

With an intelligent, responsive conversational AI-driven solution in place, AGCO was able to realize dramatic improvements in customer service. The new, intuitive, and efficient bot was able to answer 80% of the dealers' questions, resulting in 10-

20% reduction in customer support ticket volume. AGCO also benefited from significant improvement in service queries resolution rate and 30% utilization rate for customer service and digital channels.



Marketing Cloud

Service Cloud

Sales Cloud



Industrial & Manufacturing

EU

For over 20 years, DELTA Machines has been a leading provider of highly precise machine tools for milling, spark erosion and bar turning.

The Challenge

To enhance accessibility by eliminating paper-based files as well as to improve the after-sales service process, by efficiently documenting and processing digital customer communications.

The Solution

Persistent's engagement with DELTA began in 2020 with the implementation of Salesforce's Service Cloud to simplify the lives of their after-sales service and technical teams. The team replaced existing inefficient and cumbersome paper-based records with Service Cloud to provide complete access to customer records at the click of a mouse. It also allowed smooth, accurate and fast handling of machine installation and troubleshooting requests and allowed updating technicians' work schedules to facilitate workflow.

Persistent also implemented Field Services, the field intervention

management solution, which enabled job notification via technicians' smartphones, based on their location and availability. This reduced response time for clients also facilitated equitable and efficient work distribution across the team. Having complete technical profile and accurate service history was made possible through the digital access to serial numbers of installed machines. This helped in creating a product knowledge base for sharing information during installation and troubleshooting. The team also enabled digital filing of field service forms via a tablet for immediate, real-time access to refer frequent or recurring breakdowns to machine suppliers.

Leading high precision machinery distributor and service provider digitizes operations to improve customer service

The Outcome

DELTA accelerated their digital transformation journey and delivered enhanced customer service. The company improved response time to all customer inquiries, including urgent repair jobs, with accurate, real-time reporting of technicians'

availability. Streamlining administrative tasks allowed technicians to focus on installing and servicing high precision machines. DELTA became the first French company in its sector to fully digitize its systems and gain a real competitive edge.

Service Cloud

Salesforce CPQ

Japanese automobile company increases productivity with Dealer Management System

A pioneer in electric vehicles,
the client is a leading Japanese
multinational automobile
manufacturer serving global
customers for 90+ years

Industrial & Manufacturing

APAC

The Challenge

The client's productivity was significantly impacted due to a lack of visibility into operations and dealer performance. They needed a centralized Customer Relationship Management (CRM) system that they could manage independently to improve operations management, streamline marketing efforts, and enhance productivity.

The client wanted the platform to enable multi-dimensional data categorization region, area, and model and generate reports and dashboards configured for dealers and end customer needs. They also needed configurable Computer Telephony Integration (CTI) and CRM processes along with a centralized customer database for running targeted campaigns or marketing activities that resonate with their target audience.

The Solution

Persistent implemented a centralized Salesforce system for lead management, allowing the client team to efficiently maintain and manage data on all dealers across India. The system captures data around lead information, qualification, conversion and progression inquiry until a lead reaches 'closed won' status. The client can schedule test drives, capture payment information, create quotes and send brochures to prospective customers through the system. The system also includes a Partner community that dealers can use to capture data of their end customers.

Persistent also configured reports and dashboards for client users based on organization hierarchy such as Managing Director (MD), Regional Sales Manager (RSM), Area Sales Manager (ASM). The system generates reports based on data captured till the level of Dealer Sales Executive, helping the client make informed decisions regarding sales and marketing strategies, internal operations, and customer service. Persistent also created dashboards for all users to monitor operations, optimize processes, and improve overall business performance based on Target vs. Achievement.

The Outcome

The new system has helped the client successfully all internal processes, resulting in simplified customer journeys and improved interactions for Dealers, RSMs, and ASMs alike. The real-time dashboards offer dealers complete transparency, giving them a 360-degree view of their dealership with role-based data access controls.



Sales Cloud

Transforming
sales and service
for European
machining and
automation
solutions company



Leading provider of machining systems, automation solutions and cutting tools to global players in the pharmaceutical, MedTech, consumer goods, automotive, and general engineering industries.

Industrial & Manufacturing

EU

The Challenge

With a strong presence across the US, Europe, and Asia, the client faced challenges from multiple inconsistent customer service processes, resulting in neglected or misplaced customer requests. The company also faced severe issues with complaint resolution due to unclear case overviews and status updates.

Further, the client used a Buying Center functionality that was overly complicated and costly due to recurring licensing fees. The client also needed support to review and rebuild competitor data sets using best practices in Salesforce.

The Solution

Persistent collaborated with the client to enhance critical processes and capabilities related to customer service and internal knowledge management. This enabled the client's end customers to access their case details and relevant articles from the customer community.

The Persistent team implemented a Salesforce-SAP integration to enhance the support experience while creating SAP service orders from Salesforce. Our solution helped the client to capture buying organization and related information for each sales opportunity in Salesforce.

Finally, in order to enhance user experience, we rebuild competitor data sets based on Salesforce best practices.

The Outcome

Assigning emails to cases and implementing escalation workflows allowed the client to streamline their customer support process. Additionally, the enhanced Service Console helped them improve L1 Support resolution rate.

Service Cloud

Sales Cloud



The Outcome

With Persistent’s help, the client was able to optimize the business process, spanning from job creation to job completion, leading to the effective utilization of service agents. This improvement enabled better resource allocation while incorporating automation led to time-saving advantages. The provision of multi-device support empowered field technicians to access the application from various locations, contributing to enhanced operational agility.

Manufacturing leader enhances productivity and saves time with automation and Salesforce

The client, a prominent player in the manufacturing domain, has a strong foothold in the US and international markets.

Industrial & Manufacturing

US

The Challenge

The client faced a series of challenges to streamline FSL’s operations. Integrating the entire job process from creation to completion demanded meticulous coordination to prevent disruptions. The client needed a user-friendly calendar system for tracking availability and alert notifications for supervisors for anything that needed their attention. Empowering technicians to manage schedules without conflicts required refining the system’s rules. Lastly, establishing an overtime approval process needed a careful balance between flexibility and adherence to company guidelines.

The Solution

Persistent helped the client tackle challenges in streamlining FSL’s processes by leveraging Lightning components to address the FSL Mobile app’s limitations. The SF1 app served as an effective alternative, with the FLS Calendar seamlessly integrated.

Notably, specialized Lightning components were enabled for technicians to allow them to see assigned work orders and unavailability in the calendar view. Additionally, Persistent configured the approval process and created a few list views for service agents and technicians based on their needs.



Service Cloud



Persistent is a leading Salesforce partner with over 18 years of implementation and consulting experience. We are a boutique provider at enterprise scale, which means you can speak with leaders in 18 countries across the globe and yet expect local expertise that is highly relevant to your geography.

persistent.com/salesforce →

Our Salesforce Expertise

End-to-End
Marketing

Sales
Automation

Omni-Channel
CX

Digital
Commerce

Branded
Engagement
Platforms

Industry Cloud
Implementation

MuleSoft
Integration

Proprietary
Solutions

Our Industry Expertise

Healthcare &
Life Sciences

Banking &
Financial Services

Software & Hi-
Tech

Industrial &
Manufacturing

Media &
Entertainment

Retail & Consumer
Products

Non-profits



Our Partnership at a Glance

6,809+
Certifications

1,400+
Joint Projects

5/5
CSAT Score

300,000+
Trailhead Badges

18+ Years
of Successful Partnership

Why Persistent Global Salesforce Practice?

Quantity

Bank on our increasingly growing revenue size, employee pool & certifications

Quality

We maintain a consistently high CSAT Score coupled with top analyst ratings

Footprint

We cover major countries across the world and provide expertise in all major Salesforce Core Clouds

Price

Various pricing models ensure our clients find a suitable plan, every time

Innovation & Knowledge

Leverage our unparalleled industry and product knowledge

Speed & Agility

We offer competitive time-to-market, flexible project approaches and agile processes

