

83% Reduction in Renewal Creation Time

Case Study

BUSINESS CHALLENGES

One of our clients, a global provider of IT services and product development solutions faced a significant operational inefficiencies due to a fully manual opportunity renewal process, resulting in missed renewals, inaccurate forecasting and delayed followups. Additionally, the sales team spent excessive time on manual reporting, impacting efficiency and limiting real-time visibility into business metrics.

OUR SOLUTION

- Automated renewal workflow triggered **90 days** before agreement expiry, ensuring timely opportunity creation and proactive follow-ups.
- Built custom dashboards using Einstein Analytics, tailored to business needs.
- Dashboards included real-time KPIs, **2-year** projections, sales trends, and a dynamic leaderboard.
- Created an open pipeline view segmented by service lines for deeper insights.
- Centralized reporting enabled data-driven decisions and improved leadership visibility.

TECHNOLOGY USED

- Salesforce Sales Cloud
- Certinia PSA
- Salesforce Out-of-the-box Features
- Apex
- Einstein Analytics (CRM Analytics)
- Process Automation (Scheduled Jobs)

VALUE DELIVERED

- **Faster Opportunity Renewals:** Reduced creation time from **30 minutes to just a 5 minutes.**
- **Eliminated Manual Errors:** Automated renewals eliminated the risk of missed opportunities.
- **Improved Visibility:** Real-time dashboards provided leadership with up-to-date insights.
- **Streamlined Reporting:** Replaced manual chart creation with centralized, interactive dashboards.
- **Proactive Sales Management:** Enabled timely actions and better customer retention.