

# Enhanced B2C interactions using Salesforce.com CRM

Atos Syntel's client is a leading provider of financial services to credit unions, their members, and valued customers worldwide. It provides innovative commercial and consumer insurance, as well as protection products to safeguard customers' assets and help find solutions for their financial needs.

Credit Union (CU) advisors used a CRM to track and maintain their interactions and sell products. They wanted to group contact details of CU members from the same household to appear under a single entity to facilitate decision making.

## CHALLENGES

- Limited decision-making due to limited information available
- Need for enhancing B2C interactions and aid campaigns

## SOLUTION

Atos Syntel recommended implementation of household solution on Force.com platform. The team implemented a Salesforce.com CRM solution with the following key features:

- Developed household and household memberships custom objects for B2C interactions without affecting existing B2B business flow
- Built custom business logic in Visualforce using Apex to support the B2C interaction
- Developed and tested a custom user interface (UI) in Visualforce across multiple browsers
- Implemented financial rules for securing and sharing data across credit union
- Integrated reports and dashboards to view member household data

## BUSINESS BENEFITS

**30%** improvement in sales productivity

- Single application to standardize sales processes across B2B and B2C interactions
- Comprehensive and consistent sales information with real-time visibility of key sales metrics
- Cost-effective, in-house developed force.com solution

### Beyond Business Benefits

- Improved sales performance with Salesforce automation
- Defect-free, rapid development using Force.com

## Delivering Excellence with Atos Syntel's Salesforce Center of Excellence

Atos Syntel's comprehensive Platform as a Service (PaaS) offering includes Salesforce.com and Heroku, enabling you to rapidly adopt public enterprise PaaS platforms. Our solutions help you achieve 40% faster time-to-market and 50% reduction in efforts. Atos Syntel has successfully delivered over 100 Salesforce projects, and we are partnering on many more. Our expertise in Salesforce solutions encompasses Sales Cloud, Service Cloud, ExactTarget Marketing Cloud, Salesforce1 platform, Chatter and Work.com.

