STREAMLINING ED-TECH SALES: DATAMATICS' SALESFORCE AUTOMATION TRANSFORMATION

DATAMATICS

The client is a cutting-edge Ed-Tech platform that delivers high-quality, multilingual content tailored to diverse curricula. By leveraging patented AI technology, the platform identifies and addresses learning gaps, ensuring personalized learning experiences for students, educators, and institutions. With a strong focus on innovation, the platform empowers educators and learners alike with data-driven insights and adaptive learning solutions.

The Challenge: Sales Process Roadblocks

As the Edu-Tech company expanded, managing its sales operations across multiple business lines became increasingly challenging. The client needed to automate its extensive sales process for over 100 users across multiple business lines—all within a strict eight-week timeline. Managing sales, customer onboarding, and support across diverse business models (B2B, B2C & B2G) proved to be a complex task, especially with employees spread across different locations.

Ensuring a consistent, efficient, and scalable process across these varied streams became a pressing challenge, requiring a solution that could seamlessly integrate with their operations while meeting the tight deadline.

The Solution: AI-Driven Sales Transformation

Datamatics implemented a comprehensive Salesforce-based solution that seamlessly integrated the client's sales, customer onboarding, and support operations. By developing over 40 unique processes, the system streamlined workflows across multiple business lines, ensuring efficiency and scalability.

With 76 distinct reports and 7 dynamic dashboards, the solution provided real-time visibility into key sales metrics, empowering leadership with data-driven decision-making. Designed to support a reporting structure for over 60 users, the system also featured 6 integrations with external platforms, enabling smooth data exchange and enhancing overall operational efficiency.

By leveraging intelligent automation and deep Salesforce expertise, Datamatics transformed the client's fragmented sales ecosystem into a unified, scalable, and high-performance platform—ensuring a successful go-live within just eight weeks.

Impacts: Seamless Sales Automation, Faster Sales Cycle

Improved lead management process

Enhanced tracking and conversion efflciency

Streamline customer on-boarding

Faster, hassle-free customer experience

Integrated Customer Issue Resolution

Quicker response and problem-solving

Performance overview with a single click

Instant access to key metrics

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit www.datamatics.com

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