



**STABILIZING AND SCALING  
SALESFORCE FOR NORTH AMERICA'S  
LEADING LTL CARRIER**

**DATAMATICS**

The Client is North America's leading Less-Than-Truckload (LTL) freight carrier, which gained customer trust for their commitment to offering services with accuracy, speed, and coordination. Their sales and service teams handle large volumes of customer interactions every day; hence, the Client leveraged Salesforce to build a reliable CRM foundation and improve customer experiences.

### **The Challenge: Struggles with Platform Usage**

Despite the Client's best intentions in implementing Salesforce, once the system went live their teams began facing new challenges due to limited internal personnel and a lack of ongoing support and training from the original implementation partner.

As usage increased, the Sales and Service teams encountered functional gaps that slowed their efforts, as necessary capabilities had not been fully implemented. That's when the Client realized the need for immediate support and approached Datamatics to enhance their existing Salesforce platform without disrupting business continuity, while ensuring sustainability and resilience.

### **The Solution: Targeted Salesforce Support**

As a first step, Datamatics evaluated their teams' day-to-day requirements and, evaluated the existing environment before making targeted improvements. Datamatics then focused on stabilizing Sales Cloud and Service Cloud, closing functional gaps, and aligning Salesforce to fill business needs.

In parallel, the team also emphasized user enablement via role-specific guidance and ongoing support.

#### **Implemented Solutions**

- Support and enhancements for Sales Cloud and Service Cloud
- Rapid knowledge transfer of existing Salesforce configuration
- Configuration-based enhancements aligned to business processes

#### **Seamless Salesforce integration with**

- IBM i (AS/400) for Legacy Data unification
- SQL Server for Structured Data
- Azure Data Factory for Data Integration
- Confluent for Real-Time Streaming
- Power BI for Business Analytics
- Okta (SSO) for Identity Management
- Obsidian for Knowledge Management

#### **Ongoing user training and managed services**

## Impact: Driving Smarter Operations with Salesforce



### Unified CRM Platform

Sales and service information centralized



### Operational Visibility

Data available when needed



### User Adoption

Teams are now fully utilizing Salesforce



### Process Efficiency

Less manual effort required

# 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](http://www.datamatics.com)

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