

# STUDY CASE



EruditeWorks

## THE BUSINESS CHALLENGE

The team was looking to move to a next-gen sales and customer service software platform.

Management wanted a unified platform to get a well-rounded view of all customer interactions as well as to track sales.

## OUR APPROACH

Working with the Salesforce.com account management, Eruditeworks introduced the ClearView management team to Salesforce.com. Walking through the feature rich platform and educating them every step of the way. Eruditeworks then rolled out Salesforce.com using a step enabled strategy to the sales, customer services and operations teams over a span of three months.

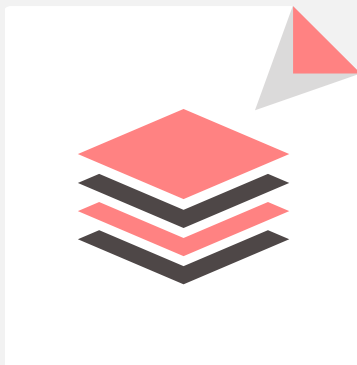
## THE OUTCOME

The ClearView management team and its employees adopted Salesforce.com right on the get-go. The overall customer satisfaction has improved as sales and customer service are able to work hand in hand. Overall, the implementation of Salesforce.com resulted in the desired outcomes as management expected and it also resulted in follow-up implementations focused on automation the operational workflows at The ClearView Group.

## TECH STACK



GROUP  
CLEARVIEW  
Benefit and Retirement Strategies



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