



## SALESFORCE OPTIMIZATION

CASE STUDY

## OPTIMIZED SALESFORCE TO IMPROVE PROCESS AUTOMATION

Helped the world's leading managed care solutions provider **reduce its turnaround time** and **improve process automation** with **Salesforce optimization**

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# Problem Statement

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The client is the first, all-inclusive organization to integrate critical control points in nursing, health, home, pharmacy, durable medical equipment, palliative and hospice care under one management structure—a managed care model. The client required optimization in their existing Salesforce tool to achieve operational value, consistency, and efficiency.

# Business Need

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The client needed a consulting partner to help them:

- Use Salesforce as a productive tool
- Improve process automation
- Increase the visibility of data

# Solution Approach

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- Developed cloud-based solutions to help the user create an entire medical report with a couple of clicks
- Customized Salesforce by using Visual force pages
- Integrated DocuSign with Salesforce so that signature work could be done in minutes
- Provided custom functionalities to support teams, such as creating custom forms or closing multiple cases with a click and also defined approval process to smoothen the workflow
- Defined business process to reduce time to process any form

# Benefits

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- Reduced turnaround time from 30 days to 10 days
- Ensured quick retrieval of reports and dashboards
- Reduced support team responsiveness time from 30 days to 03 days
- Simplified the process of calculating the values as the validation rules and approval process did the rest of the work
- Ensured a clear distinct relationship management with patients, doctors, task & activities and insurance companies

# Technology Stack

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