

CLIENT PROFILE

Our client is a leading luxury senior living provider, operating across 20 retirement villages in the UK. These villages offer exceptional facilities at the heart of the community, ensuring a premium living experience for their residents. With a focus on comfort, care, and community, they continuously strive to enhance operational efficiency and resident experience through technology-driven solutions.



Current Landscape

The client was using Intercom CRM, but it was cost-prohibitive, so they sought a more cost-effective alternative.





PROJECT BACKGROUND

Managing data across multiple locations presented significant challenges for the client. Their existing system struggled with duplicate records, inefficient data synchronization, and integration difficulties across platforms. These inefficiencies led to delays in service delivery, inconsistencies in customer records, and operational bottlenecks. They needed a reliable and scalable solution to streamline data management, eliminate duplication, and ensure seamless integration between systems.

CRM Masters helped them recognise the power of Salesforce, they sought our expertise to develop a customized solution that would enhance automation, improve data accuracy, and create a unified ecosystem for their customer and operational data.



Business Type

B2C (Business to Customer)





United Kingdom

CHALLENGES FACED BY THE CLIENT

Despite their commitment to providing top-tier services, the client faced significant challenges in managing and synchronizing data across their systems:



The existing system lacked the ability to seamlessly connect various applications, causing data silos and inefficiencies.

2. Handling Duplicate Records & Related Data

Multiple duplicate records within their system caused confusion, leading to incorrect reporting and miscommunication with residents.









3. Data Synchronization Issues

Inconsistencies between different systems meant that information was not always up to date, leading to delays in decision-making and service execution.

4. Irregular Data Handling

A lack of automated data management processes resulted in manual errors, impacting operational efficiency and compliance.

OUR SOLUTION



To address these challenges, we implemented a comprehensive solution leveraging Salesforce capabilities:

01 Custom API

Designed and deployed custom APIs to enable seamless communication between different systems, ensuring data consistency and reducing manual effort.

02 Record Merge Solution with APEX

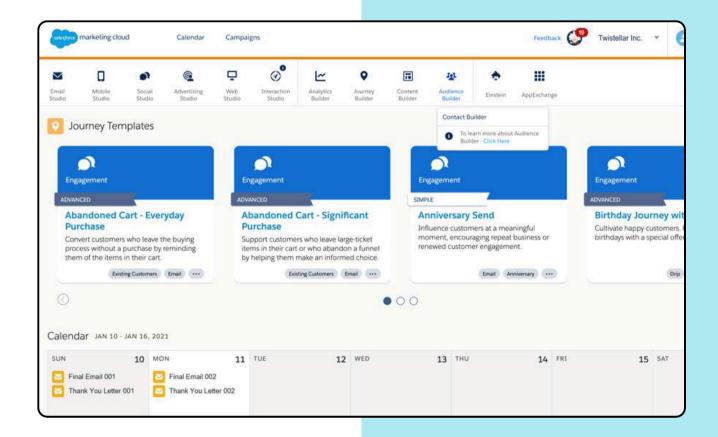
Implemented an APEX-based asynchronous script to detect and merge duplicate records, ensuring a single source of truth for customer data.

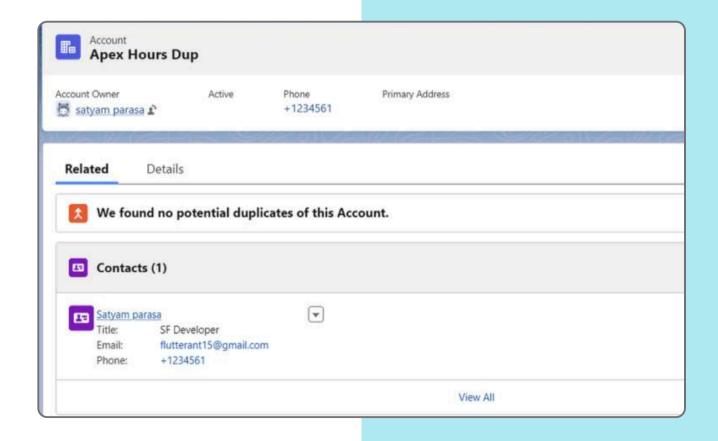
03 Salesforce Marketing Cloud Integration with ECR System

Integrated Salesforce Marketing Cloud with the client's existing ECR system, ensuring smooth data flow for personalized customer engagement.

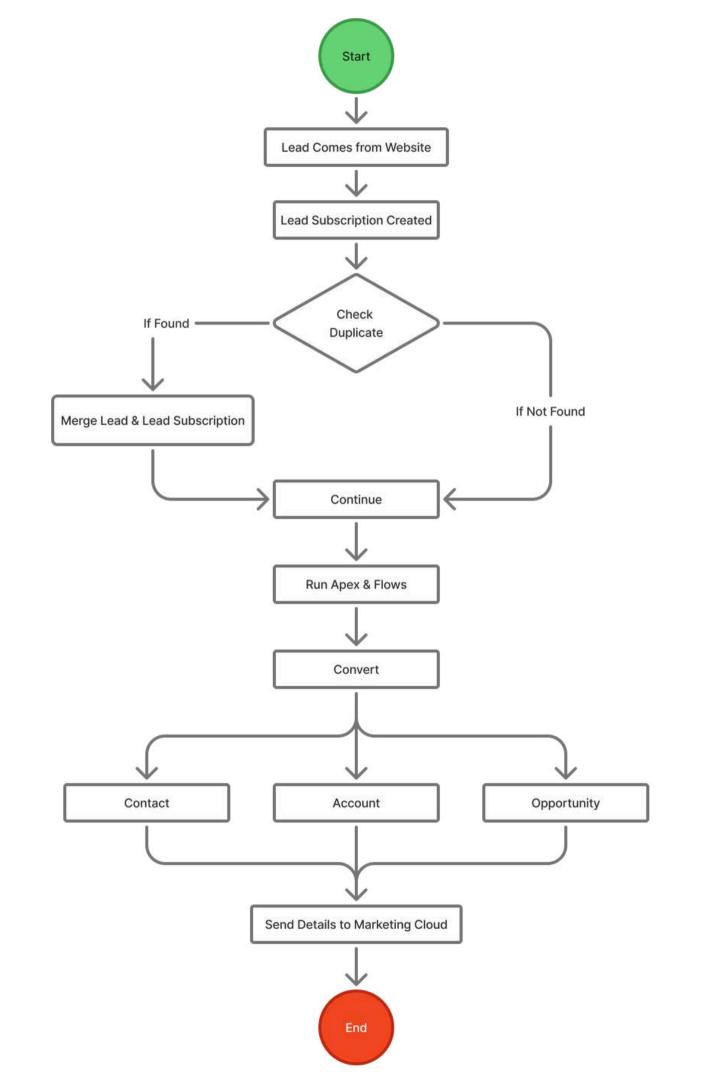
04 Webhooks & Custom APEX Implementations

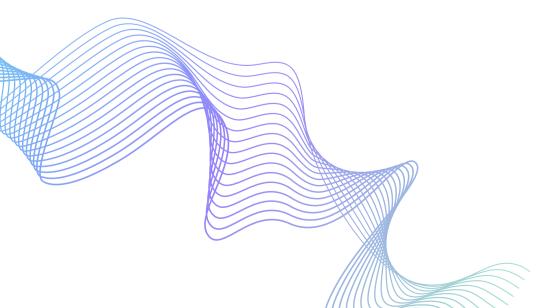
Developed webhooks and APEX scripts to automate data handling, ensuring real-time updates across all platforms without manual intervention.





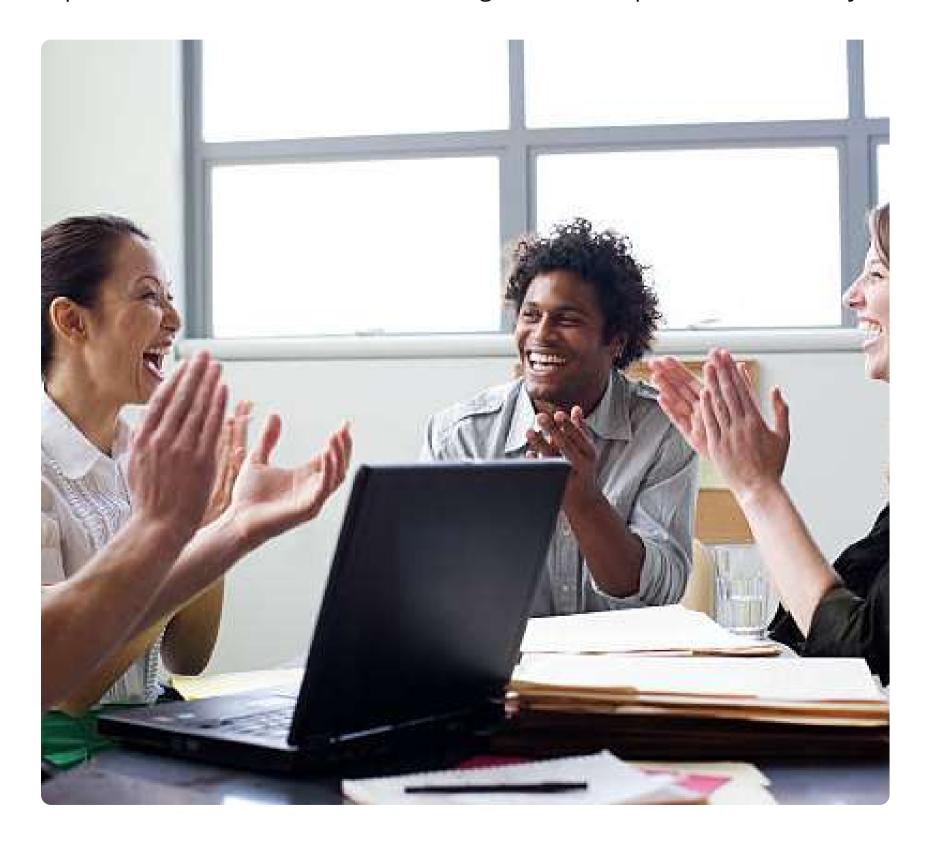
FLOW CHART





RESULTS

The successful implementation of our Salesforce solutions brought measurable improvements to the client's data management and operational efficiency.



Key outcomes included:

01. Enhanced API Integration

Created a centralized system that eliminated data silos and improved workflow automation.

02. 90% Reduction in Duplicate Records

Streamlined customer records, improving accuracy and decision-making.

03. Real-time Data Synchronization

Ensured seamless data updates across platforms, leading to better service coordination and efficiency.

04. Automated Data Handling Processes

Reduced human errors, improved compliance, and enhanced overall productivity.

05. Faster Decision-Making

With accurate and real-time data availability, the client could make well-informed decisions quickly.

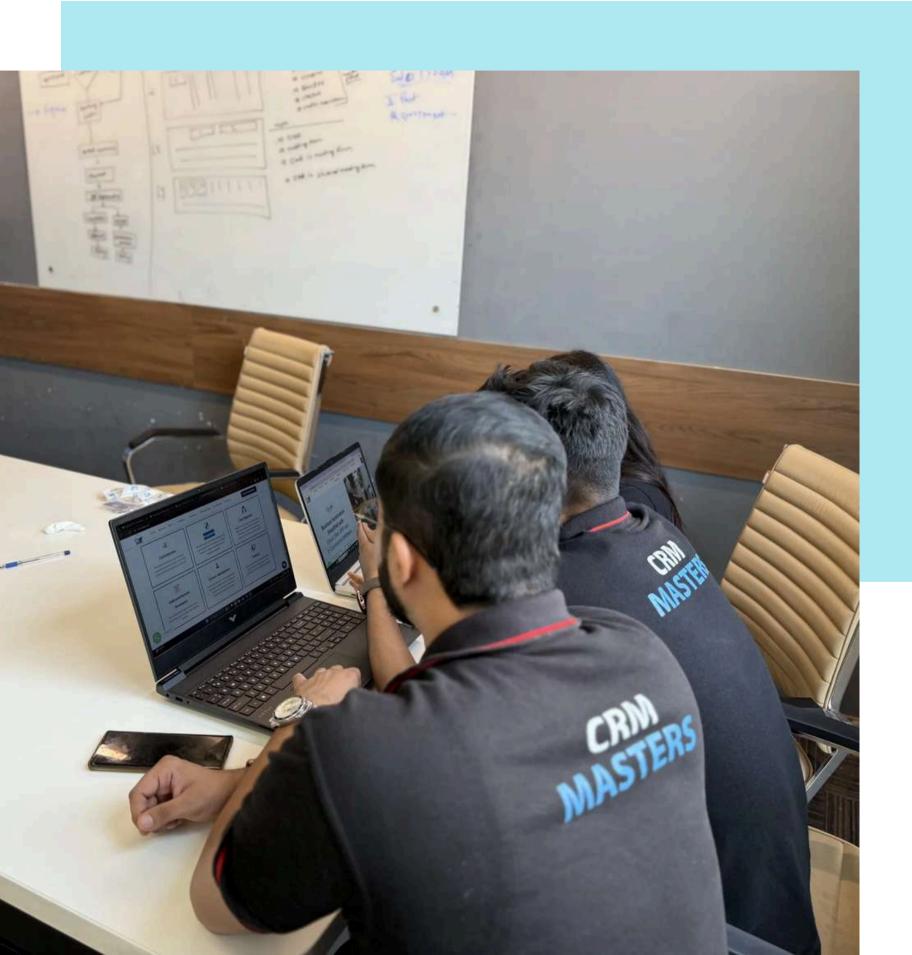




About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

CRM Masters Infotech is a trusted consulting partner specializing in CRM, ERP, and eCommerce solutions. With a team of 100+certified developers, we provide customized Salesforce solutions designed to optimize business operations, improve customer engagement, and drive digital transformation. Our expertise enables businesses across various industries to enhance efficiency, streamline processes, and achieve long-term success. Looking to optimize your CRM system? Contact us today and take your business to the next level!



LET'S TALK & FIND YOUR SOLUTION



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