



7 Ways to Supercharge Salesforce

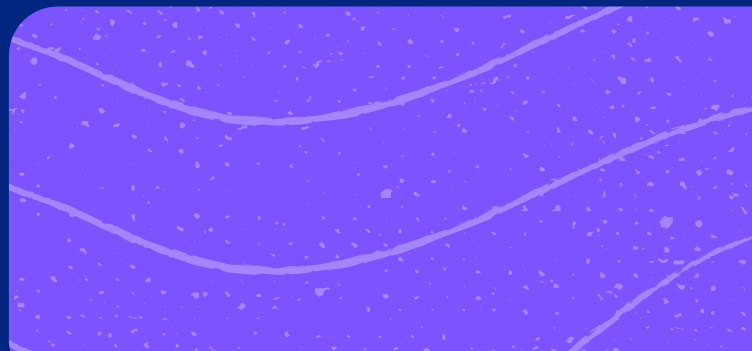
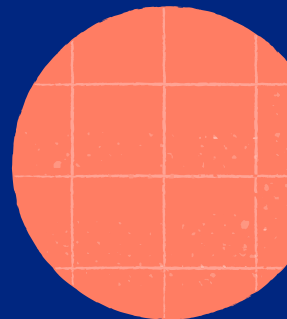
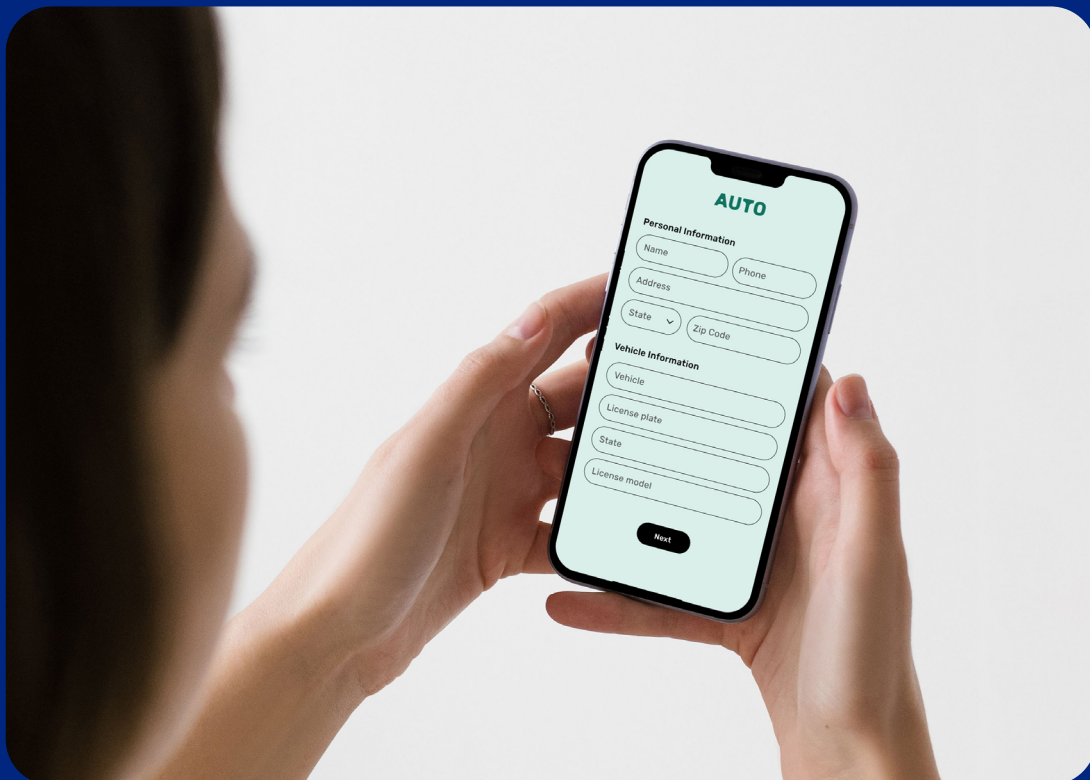
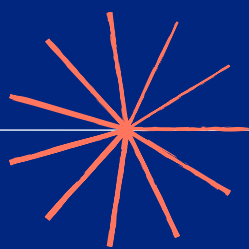


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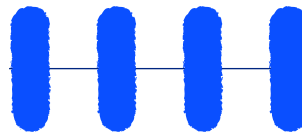
Introduction

Salesforce has redefined customer relationship management (CRM) across industries, providing businesses with a powerful platform to manage interactions and data. However, the key to staying ahead of the competition lies in enhancing Salesforce with innovative tools that streamline business operations. This ebook highlights seven ways businesses across various industries can leverage digital solutions to improve Salesforce's efficiency and deliver exceptional customer experiences.



Chapter 1

Leverage AI for Smarter Decisions



- **Use Case**

Transforming raw data into actionable insights with AI-driven analytics.

- **Why It Matters**

In a competitive landscape, anticipating market trends and customer needs is crucial. AI-powered analytics enable organizations to go beyond historical data, leveraging predictive modelling and real-time insights. This helps your business enhance strategic planning, proactively address challenges, and seize opportunities so you drive growth and efficiency.

- **Key Benefits**

- 35% improvement in sales efficiency (McKinsey, 2022)
- 20% reduction in operational costs (Gartner, 2023)

- **Who Benefits**

- Retailers: Optimize inventory during peak seasons and improve merchandising strategies
- Financial institutions: Enhance risk assessment and identify high-value investment opportunities
- Manufacturers: Reduce supply chain risks and streamline production planning



Chapter 2

Empower Customers with Digital Self-Service



• **Use Case**

Implementing self-service portals to enhance user experience and reduce support burdens.

• **Why It Matters**

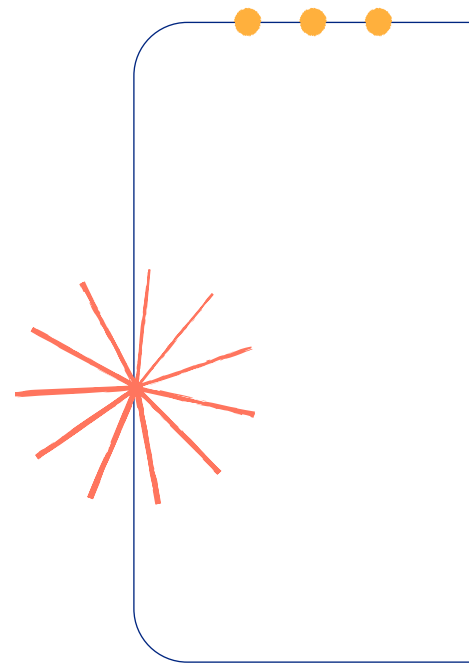
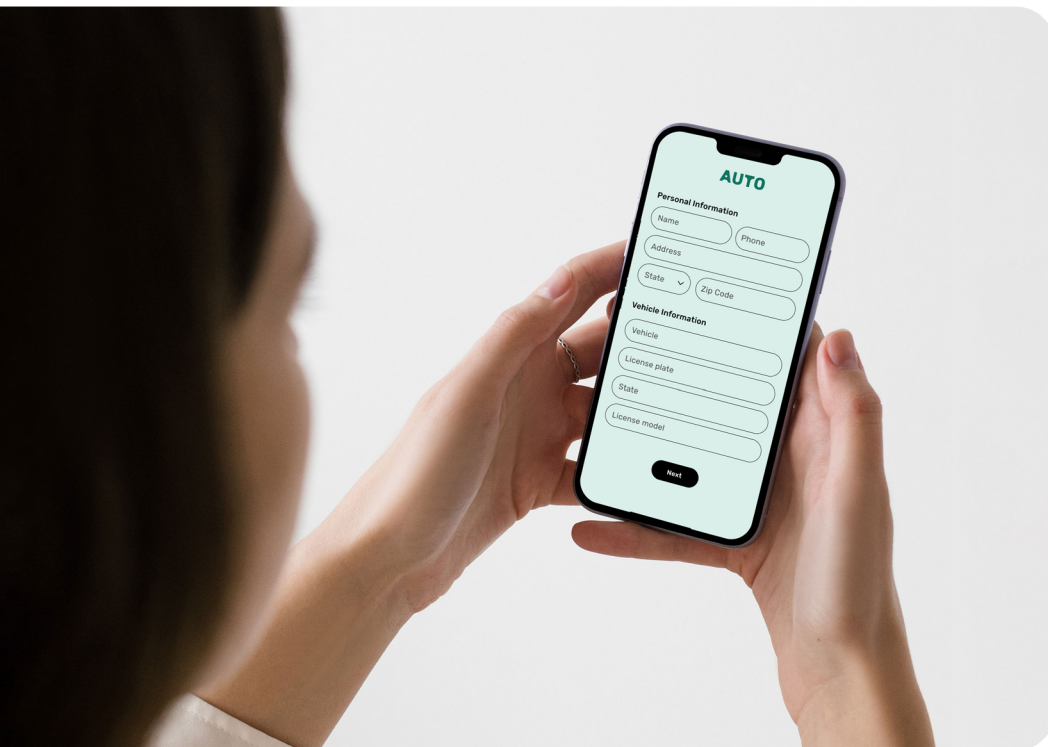
Today's customers increasingly expect autonomy in managing their interactions with businesses. Self-service capabilities address this demand by providing instant access to information and tools. Salesforce-integrated portals allow users to handle tasks such as updating profiles, accessing resources, and tracking support tickets independently. This allows you to meet customer expectations 24/7 and reduce the burden on support teams so they can focus on more complex inquiries.

• **Key Benefits**

- 25% reduction in support costs (Forrester, 2022)
- 30% increase in customer satisfaction (Salesforce State of Service Report, 2023)

• **Benefits by Industry**

- Health Care: Patients book appointments online, access medical records, and manage healthcare interactions
- Telecommunications: Customers troubleshoot and manage accounts on demand
- Retail: Shoppers track orders, manage returns, and access their purchase history



Chapter 3

Streamline Document Management

Use Case

Automating the generation of personalized and compliant documents with dynamic templates.

Why It Matters

Generating dynamic documents transforms how organizations handle customer-facing processes. By automating the creation of personalized and compliant materials such as policy documents, proposals, and consent forms, businesses reduce errors and save time. In the healthcare industry, dynamic documents enable quick preparation of patient consent forms, ensuring accuracy and compliance. Wellness and medical treatment providers also streamline eConsent processes, making it easy for patients to understand and approve procedures digitally, reducing stress and fostering trust.

Key Benefits

- 70% reduction in document preparation time (Forrester, 2022)
- Significant decrease in human errors (IDC, 2023)

Benefits by Industry

- Insurance:** Insurers generate personalized policy creation with accurate data inputs
- Real estate:** Firms simplify property agreements and lease contracts
- Healthcare:** Providers prepare consent forms efficiently and accurately for patient treatments
- Wellness and Medical:** Treatment providers digitize eConsent forms, reducing delays and ensuring clear communication
- Professional Service Firms:** Standardize proposals and contracts to enhance client trust



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Consent

By signing below, you consent to participate in this research study. You confirm that you have read (or had read to you) the information provided, had the opportunity to ask questions, and understand the study procedures. You voluntarily agree to participate.

The participant is illiterate.

Sam

Smith

Date of birth
03/10/88

Signature

Sam

Submit

MedCare

Address: 123 Elm Street, Westwood, NY 10001
Phone: (888) 123-4567
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Informed Consent Form for Medical Research

Welcome! We are inviting you to participate in a medical research study focused on evaluating a new drug or treatment. This study aims to gather data on conditions similar to yours to better understand and potentially address the issue.

Voluntary Participation
Participation in this study is entirely voluntary. You have the right to refuse or withdraw from the study at any time without any negative consequences.

Study Purpose
This study targets individuals with a condition that affects approximately 1 in 10,000 people. Our goal is to explore the underlying causes of this condition and to evaluate the effectiveness of a new treatment. We currently have 13 participants and are seeking a total of 200 individuals to join the research.

Participant Responsibilities
As a participant, you will be asked to provide various biological samples, including urine, saliva, stool, and blood. These samples will be collected periodically as needed, and our researchers determine that sufficient data has been gathered.

Potential Risks
The primary risk involved is minor discomfort from blood draws, which may include a small amount of bleeding or pain. Beyond this, there are no other anticipated risks associated with participating in the study.

Benefits
While there are no guaranteed personal benefits from participating, your involvement will contribute valuable insights that may help others with similar conditions.

Confidentiality
All information collected during this study will be kept confidential. You may choose to allow the use of your name and personal details in research publications. The institution will own all research data, and your identity will remain protected.

Consent
By signing below, you consent to participate in this research study. You confirm that you have read (or had read to you) the information provided, had the opportunity to ask questions, and understand the study procedures. You voluntarily agree to participate.

Participant Information

First Name: Last Name: Date of birth:

The participant is illiterate.

Signature:

Phone: (888) 123-4567 medcare.com

Chapter 4

Centralize Customer Interactions



- **Use Case**

Delivering seamless omnichannel customer engagement.

- **Why It Matters**

In an era where customer loyalty hinges on exceptional experiences, fragmented communication can damage trust and satisfaction. Customers expect connected experiences between platforms—whether switching from email to live chat or engaging via social media. Salesforce, integrated with advanced digital tools, centralizes these touchpoints, enabling businesses to create consistent and personalized interactions at scale. This approach reduces response times, gives agents a 360-degree view of the customer experience, and fosters brand trust that drives loyalty.

- **Key Benefits**

- 20% increase in customer engagement (Aberdeen Group, 2023)
- 25% faster resolution of inquiries (Gartner, 2023)
- Enhanced brand perception through unified communication
- Increased team productivity by reducing siloed operations

- **Benefits by Industry**

- Retail: Customer support manages customer queries across social platforms, email, and live chat seamlessly
- Hospitality: Hotels elevate guest experiences with cohesive communication before, during, and after guest stays
- Financial Services: Agents provide real-time updates on accounts and loans while ensuring accurate and secure communication



Chapter 5

Simplify Agreement Signing

- **Use Case**

Automating approvals and document signing with eSignature tools.

- **Why It Matters**

Delays in agreement signing can stall progress and harm customer relationships. Efficient eSignature tools connected to Salesforce simplify complex approval workflows, ensuring contracts are finalized securely and without friction. Automated notifications, real-time tracking, and integration with core business software create a transparent process that meets compliance requirements and enhances the user experience. By reducing the dependency on manual paperwork, businesses save time, cut costs, and minimize errors.

- **Key Benefits**

- 80% faster agreement turnaround times (P&S Intelligence, 2021)
- Enhanced compliance and audit trails (Salesforce Compliance Report, 2023)

- **Benefits by Industry**

- Legal: Teams expedite contract signing and ensure compliance
- Financial Services: Organizations accelerate loan approvals and reduce manual errors
- Real Estate: Professionals finalize property sales and leases efficientl



Chapter 6

Streamline Onboarding Processes

- **Use Case**

Providing seamless onboarding experiences for customers and employees.

- **Why It Matters**

First impressions happen once. A smooth, structured onboarding process establishes trust and sets the stage for success from the start. Digital onboarding tools connected to Salesforce automate repetitive tasks, reduce errors, and ensure consistent processes across teams. Dynamic digital tools help tailor onboarding journeys to individual needs, reinforcing a sense of value and commitment. Businesses save time and enhance engagement leading to improved retention and satisfaction.

- **Key Benefits**

- 60% reduction in onboarding time (Deloitte, 2023)
- 30% improvement in retention rates (PwC, 2022)

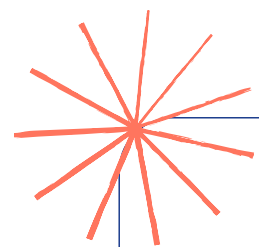
- **Benefits by Industry**

- SaaS Companies: Onboard users swiftly with tailored setup processes
- Banks: Automate account openings with secure identity verification steps
- Educational Institutions: Speed up student registration and reduce administrative backlogs.

Welcome!
Start your onboarding

60% reduction in onboarding time
Deloitte, 2023

30% improvement in retention rates
PwC, 2022



Chapter 7

Ensure Compliance and Security

- **Use Case**

Automating compliance processes and securing data management.

- **Why It Matters**

Compliance is a cornerstone of business integrity and customer trust, yet managing it manually can be resource-intensive and error-prone. By connecting automated compliance tools to Salesforce, businesses proactively address regulatory requirements, ensure audit readiness, and protect sensitive data. By leveraging real-time monitoring and advanced security measures, companies can stay ahead of evolving regulations, reduce compliance risks, and build a reputation for reliability and transparency.

- **Key Benefits**

- 40% reduction in compliance-related issues (IBM, 2023)
- Improved audit readiness and data protection (Gartner, 2023)

- **Benefits by Industry**

- **Healthcare:** Providers maintain HIPAA compliance while securing patient data.
- **Financial Organizations:** Adhere to GDPR standards for secure data handling.
- **Government Agencies:** Ensure policy compliance with minimal manual intervention.

Supercharge Salesforce with Digital Solutions

The use cases outlined above showcase that Salesforce alone isn't enough to improve your operations and create excellent customer experiences. Extending Salesforce with digital solutions is essential to maintaining a competitive edge in today's dynamic market. Tools built for digital processes, digital signatures, and dynamic document management will help your business streamline operations, improve customer satisfaction, and drive growth—right from Salesforce.

Future-Proof Success with EasySend

EasySend is a digital platform with a suite of products that enhance Salesforce, including Digital Journeys, Dynamic Documents, and eSignatures. With EasySend, launch personalized digital processes right from Salesforce, track progress and streamline customer data intake from any device or channel.

