

## Revitalizing Salesforce Sales Cloud: Aligning and Enhancing Ongoing Business Practices

---

**Company Brief** - Sierra Insurance, an esteemed **healthcare insurance distribution** company headquartered in Texas, excels in providing **personalized insurance sales services** over the phone.

Sierra Insurance offers three different plans, namely "**Medicare Advantage**," "**ACA Plans**," and "**Short Term**," encompassing a total of **25 comprehensive products**. The company relies on Five9 as its primary **lead generation source**, ensuring efficient and effective operations.



# Challenges

*If The Challenge exists, so must the solution*

- **Manual Lead Assignment**

**Manual lead assignment**, user-driven data, and **lack of proper flow** disrupted the dynamics and created obstacles for the agents.

- **Unorganized Reports and Dashboard**

**Unorganized data** in **multiple reports** hindered their usefulness, impeding the generation of **desired insights** and pausing **data-based strategy** formulation for the managers.

- **Multiple Tangled Processes**

The team discovered **multiple activated Process Builders** on Account, Lead, Opportunity, and Campaign objects, which will **soon** become **obsolete**.





# Solutions

*When Business Meets, Technology*

Optimizing business goals and platform performance was achieved through a **Health Org check-up** and required **implementation** in **Salesforce Sales Cloud**.



## Salesforce Sales Cloud

- **Automated Lead Assignment**

Implementing **Lead Assignment rules** optimizes lead distribution, ensuring **timely assignment** to available agents. The lead assignment process is streamlined by introducing **flows** and **replacing process builders**.

- **Performance Tracking & Data-driven Decision Making**

**Customized reports** drive improved **individual performance** tracking, giving admins and managers **complete access** to Old and New business reports, total cases reports, new customer closure reports, and custom reports.

This enables **data-driven decision-making** and optimization of business strategies.

- **Automation boosting operations:**

Introduced **user-specific notifications** for the agents and created **email templates** that were customer specific, which would enhance and **automate** the process.

- **Giving central control**

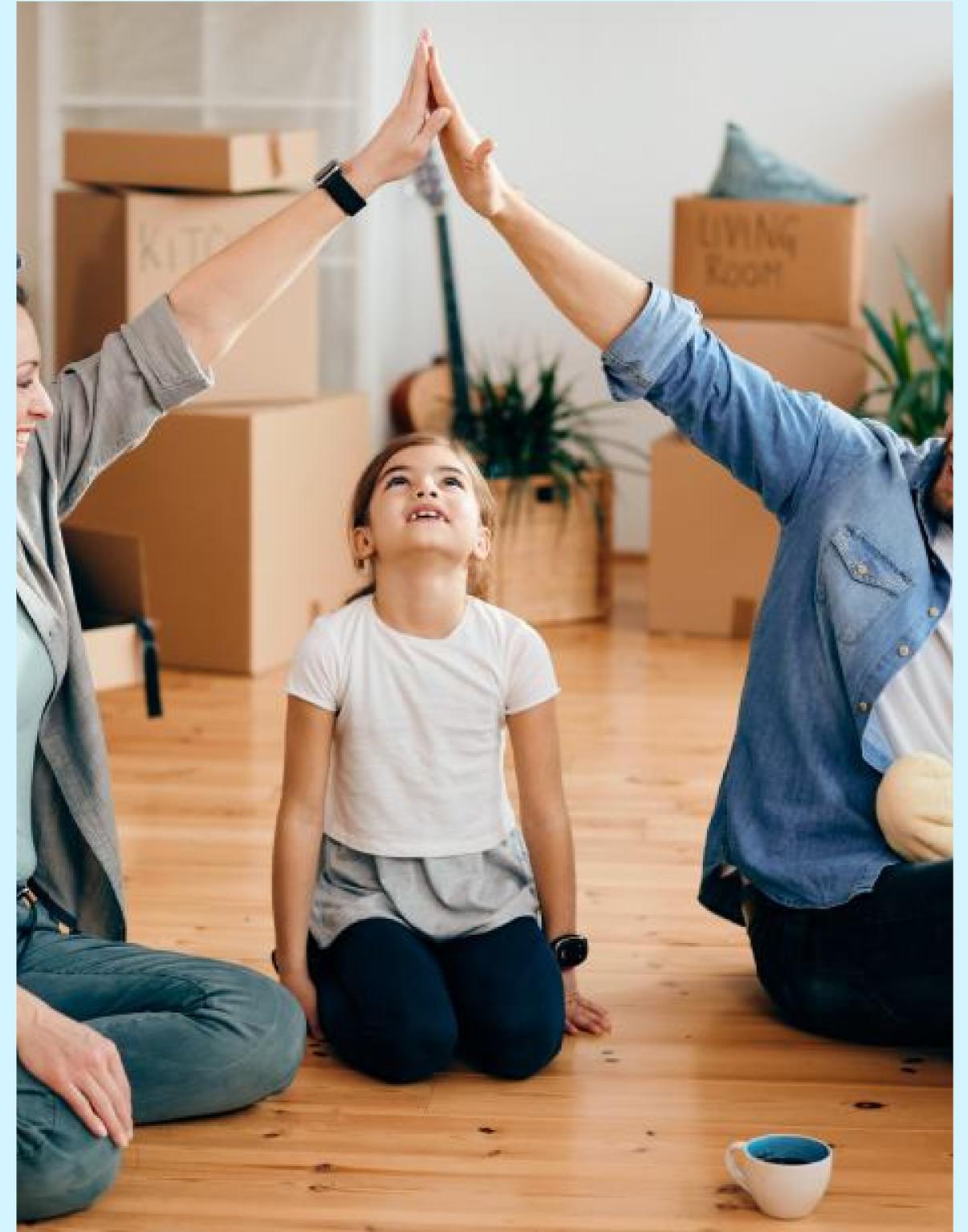
The business **flow defined roles** for each user in Salesforce, which helped in **implementing approvals** and **limiting the access** of the users.



## Benefits

Discover why our customers keep coming back.

- By optimizing lead assignment, delayed response were eliminated, resulting in improved customer engagement and satisfaction.
- Tracking sales representative performance empowers managers to make informed decisions, driving desired outcomes and increased productivity.
- Automated processes enable sales reps to focus on growth, improving performance, and professional development.





**Sierra Insurance**  
HEALTH - LIFE INSURANCE

got their org's health check-up on time and  
Ignited growth with Salesforce Implementation Services.

Ready for a Transformative Change? Assess Your Organization's  
Health Now!

**Connect With Us Today!**

 **+1 628 262 4010**

 **hello@cyntexa.com**

 **cyntexa.com**



# cyntexa.

Global CRM Solutions Provider

Being a leading Salesforce Partner, Cyntexa's global capabilities and the team of CRM experts are assisting businesses of all sizes and types to streamline their manual processes in definite clicks.

We have a team of 300+ Salesforce experts, certified and accredited as Salesforce AppExchange Partner, Salesforce Implementation Partner, and Salesforce Consulting Partner.

With expertise in CRM implementation, integration, and business process automation, we stand out as a prominent industry leader, delivering solutions that generate substantial value to meet your diverse business requirements.