



## Success Story

# How Exavalu Delivered an Efficient Lead Management System and Increased Agent Users by 41%

## Objective

A leading personal lines insurance company wanted to modernize its lead management system and drive better business outcomes. They were looking for a proficient technology partner who could provide strategic direction, development expertise, and governance, so they partnered with Exavalu.

## Service Offered

- Advisory
- Implementation

## Challenges

Our client struggled with fragmented lead management processes. They relied on multiple disconnected systems that hindered both their efficiency and visibility. They did not have a unified platform to manage and auto-assign leads based on sales agents' expertise. This limited their insights into customer interactions across product lines like Auto, Home, Membership, and Life.

To streamline business operations, our client needed to integrate their Member Relationship Management (MRM) System with Salesforce so that they could get a consolidated view of leads, assignments, and progress in the conversion process.

## How Exavalu Made an Impact



We adopted a deeply collaborative approach and focused on implementing Financial Services Cloud, integrated with MuleSoft. This connected back-end policy and membership management systems, enabling a unified customer view. We led business requirement grooming, solution design, development, and DevOps to deliver an end-to-end solution, including deployment guidance.

We then set up a skilled team of Salesforce professionals, blending onshore and offshore resources to efficiently handle their business requirements and development. Our solution incorporated multiple business units and product lines- Auto, Home, Ancillary Benefits, and Life- into a single platform, while empowering business and IT leadership to envision a robust CRM roadmap.

### Business Impact

- Improved lead conversion rates by minimizing duplicates from multiple sources.
- Streamlined lead routing for the efficient distribution of leads and inquiries among sales agents.
- Enabled click-to-dial functionality through outbound CTI calling via Avaya APIs for agents to act faster.
- Delivered high-quality leads, enabling faster conversions.
- Accelerated the rollout of the new Salesforce platform features with improved efficiency.
- Provided a robust foundation to support multiple integrations and future growth.

### Metrics

**35%** Improvement in Lead Conversion

**~41%** Increase in Target Users

**250** Sales Agents Managing Leads