



CASE STUDY

Sales Journey & Case Management Optimisation

Technical Consultant

The supplier faced challenges in scaling operations, aiming to maintain growth without compromising service, needed streamlined processes for efficient management, desired outcome was improved operational efficiency, ensuring continued growth and customer satisfaction, while enhancing service delivery and performance.

CHALLENGES

- Lack of unified data source hinders decision-making.
- Manual processes increase operational costs.
- Disconnected tools lead to inefficiencies.
- Slow sales journeys result in lost opportunities.
- Inflexible systems limit business adaptability.

STRATEGIC RESPONSE

- Customer-led journey enhanced buying experience.
- Dynamic pricing optimised sales strategies.
- Broker portal streamlined sales management.
- Case management improved billing integration.
- Industry data sources ensured best practices.
- Cloud transformation increased operational agility.
- Mulesoft integration facilitated seamless processes.

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RESULT



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Client Confidential

CONCLUSION

- Accelerated B2B sales journey significantly.
- Reduced sales process from days to hours.
- Enhanced customer service efficiency greatly.
- Agents resolve queries in a single system.
- Improved online quoting capabilities effectively.
- Streamlined operations for better performance.
- Increased customer satisfaction with faster service.

Case Study Reference - [3328](#)

