



**RevInfotech**  
revolution redefined



# Portfolio of SalesForce

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## VERSION:

DATE	AUTHOR	VERSION	CHANGE SUMMARY
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# Portfolio of SalesForce

## Overview:-

Revinfotech Pvt. Ltd. specializes in delivering customized Salesforce CRM solutions tailored for the logistics and freight industry. In this project, we partnered with a leading cold chain logistics company to implement an advanced Salesforce Sales Cloud and Service Cloud system integrated with IoT technology for real-time temperature monitoring, warehouse optimization, and compliance automation. Our Salesforce solution transformed their operations by increasing efficiency, reducing spoilage, and providing full transparency throughout the shipment lifecycle — helping them stay ahead in a competitive market.

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## Project Overview

- **Client:** Action TESA (India)
- **Industry:** Engineered Wood Products, Home Improvement, Interior Design
- **Duration:** 2 Months
- **Location:** India

Action TESA is a leading manufacturer of wood products like MDF, HDF, Particle Boards, and Laminates. They sell to architects, interior designers, contractors, and furniture makers across India. Action TESA wanted to improve their lead management, speed up follow-ups, and automate repetitive tasks using Salesforce CRM.

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## Project Objectives:-

- Capture and manage website leads in **Salesforce Sales Cloud**
- Automate lead follow-ups using **Salesforce workflows**
- Standardize lead communication with **custom email templates**
- Use **Salesforce Flow Builder** for decision-based lead nurturing
- Build custom fields for better **lead qualification** (location, budget, project type)

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## Our Solution

### Custom Salesforce Sales Cloud CRM for Action TESA

- **Zapier Integration:** Connected Action TESA's website forms to **Salesforce CRM** for real-time lead capture.
- **Automated Email Templates:** Branded email templates for consistent communication.
- **Salesforce Flow Builder Automation:** Lead nurturing workflows based on responses and pipeline stages.

- **Custom Fields:** Captured key lead data like location, budget, and project details for better segmentation.
- **Lead Status Automation:** Follow-ups, task creation, and lead status updates automated in Salesforce.

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## Technology Stack

Technology	Description
CRM Platform	<b>Salesforce Sales Cloud</b>
Automation Integration	Zapier
Flow Builder	Salesforce Flow Builder for lead workflows
Email Automation	Salesforce Email Templates
Lead Data Fields	Custom Fields in Salesforce for qualification
CRM for Home Services	Salesforce CRM for Home Improvement & Interior Design

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## Business Impact

Metric	Before	After	Improvement
Lead Response Time	24-48 hrs (manual)	<1 hr (automated Salesforce assignment)	95% faster response
Lead Capture Process	Manual data entry from website	Automated via <b>Zapier-Salesforce</b>	5+ hrs/week saved
Email Communication	Inconsistent, manual	Standardized via Salesforce templates	Branded, consistent emails
Lead Qualification	Ad-hoc, spreadsheet-based	Salesforce Custom Fields & segmentation	30% more qualified leads

Time Spent on Repetitive Tasks	10+ hrs/week on follow-ups	Fully automated in Salesforce	10+ hrs/week saved
Conversion Rate	Lower	15% higher conversion rate post-automation	Boost in sales conversions

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## Our Role in Action TESA's Salesforce CRM Success

- Connected website forms to **Salesforce CRM** using **Zapier**
  - Designed branded **Salesforce email templates** for lead communication
  - Built **Flow Builder automations** for follow-ups and lead nurturing
  - Configured **custom fields** for better lead insights and segmentation
  - Trained Action TESA's team on Salesforce CRM features
  - Provided post-implementation support for continuous optimization
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## Why Choose RevInfotech for Salesforce CRM Implementation?

Deep understanding of **Salesforce Sales Cloud** & CRM best practices  
Experience in **CRM for Home Services, Interior Design, and B2B Sales**  
Expertise in **Salesforce Flow Builder, Zapier, and CRM Integrations**  
Proven results in improving **lead management, automation, and communication**  
Commitment to delivering cost-effective, scalable **Salesforce solutions**

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## Workflow of the Solution

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### Lead Capture & Qualification

- **Modules Used:** Salesforce Sales Cloud, Custom Fields, Zapier Integration
- **Details:**
  - Captured website leads in real-time with Zapier-Salesforce connection
  - Stored key data: location, project type, budget
  - Segmented leads for targeted nurturing
- **Client Benefits:**
  - No more lost leads
  - Better prioritization for sales team

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### Automated Lead Nurturing

- **Modules Used:** Salesforce Flow Builder, Email Templates
- **Details:**
  - Triggered personalized emails & follow-up actions
  - Guided leads through the pipeline based on responses
- **Client Benefits:**
  - Faster lead response

- Higher engagement
- Increased conversions

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## Email Communication Standardization

- **Modules Used:** Salesforce Email Templates
  - **Details:**
    - Branded templates for lead follow-ups
    - Consistent messaging across team
  - **Client Benefits:**
    - Professional communication
    - Improved brand trust
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