

**HCL**

# Scaling digital enterprise journeys across value chains

Transforming enterprises from ground-up  
with HCLTech and Salesforce partnership



[www.hcltech.com](http://www.hcltech.com)

# Introduction

Salesforce, over the years, has transformed how organizations sell, market, and deliver services with its industry-leading offerings. As a Summit Consulting Partner for Salesforce, HCL Technologies helps global enterprises accelerate business transformation by offering an integrated approach that covers people, processes, technology, applications, and data.

HCL Technologies is a market leader in the rapidly growing market space associated with Salesforce products, including Sales, Service, Marketing, Commerce, CPQ, Experiences (formerly Communities), Industry solutions, Platforms, and AppExchange products. The HCLTech Salesforce spectrum offers a comprehensive range of services, from advisory and system integration services to support services, and helps enterprises achieve the full potential of Salesforce solutions to reshape business experiences.



## Connected Digital Experiences

Shared experiences and open communication between business stakeholders can help drive enterprise-wide collaborations and customer service success by bringing sales channels closer and enhancing employee productivity. HCLTech leverages Slack and Salesforce lightning components alongside its UI/UX capabilities to develop feature-rich, delightful communities, including customer, partner, and employee communities.

# Innovation in E-commerce and CPQ

HCL Technologies is helping global enterprises leverage eCommerce and CPQ solutions to create an end-to-end omnichannel customer experience, maximize sales, make sales teams smarter, deliver personalized services, improve accuracy, and streamline sales and finance operations. HCL Technologies is helping organizations digitize their application landscape with leading solutions in E-commerce and CPQ through internally developed, salesforce-based solutions 'HAPI' and 'PROPEL.'

## Connected Intelligence

With data emanating from multiple sources, it is becoming essential to make this data more meaningful by streaming it into Salesforce and helping organizations take their customer engagement to the next level. HCLTech facilitates its customers in this journey by empowering them to build a connected and intelligent ecosystem by leveraging Salesforce Customer 360 and Analytics solutions.





# Industry Solutions

Industry-specific digital first processes and data models help customers realize faster business value and reduced cost. HCLTech is leading engagements with its customers to accelerate their digital transformation through various Salesforce Industry focused cloud solutions for Banking & Insurance, Healthcare, Manufacturing, and Communications. HCLTech has made dedicated investments in new Industry cloud solutions like the Consumer Goods cloud from Salesforce and HCLTech’s solution for the Hospitality industry.

# HCLTech’s Salesforce Practice



# Discover HCLTech's Salesforce Accelerators

## **InFusion Experience Flow**

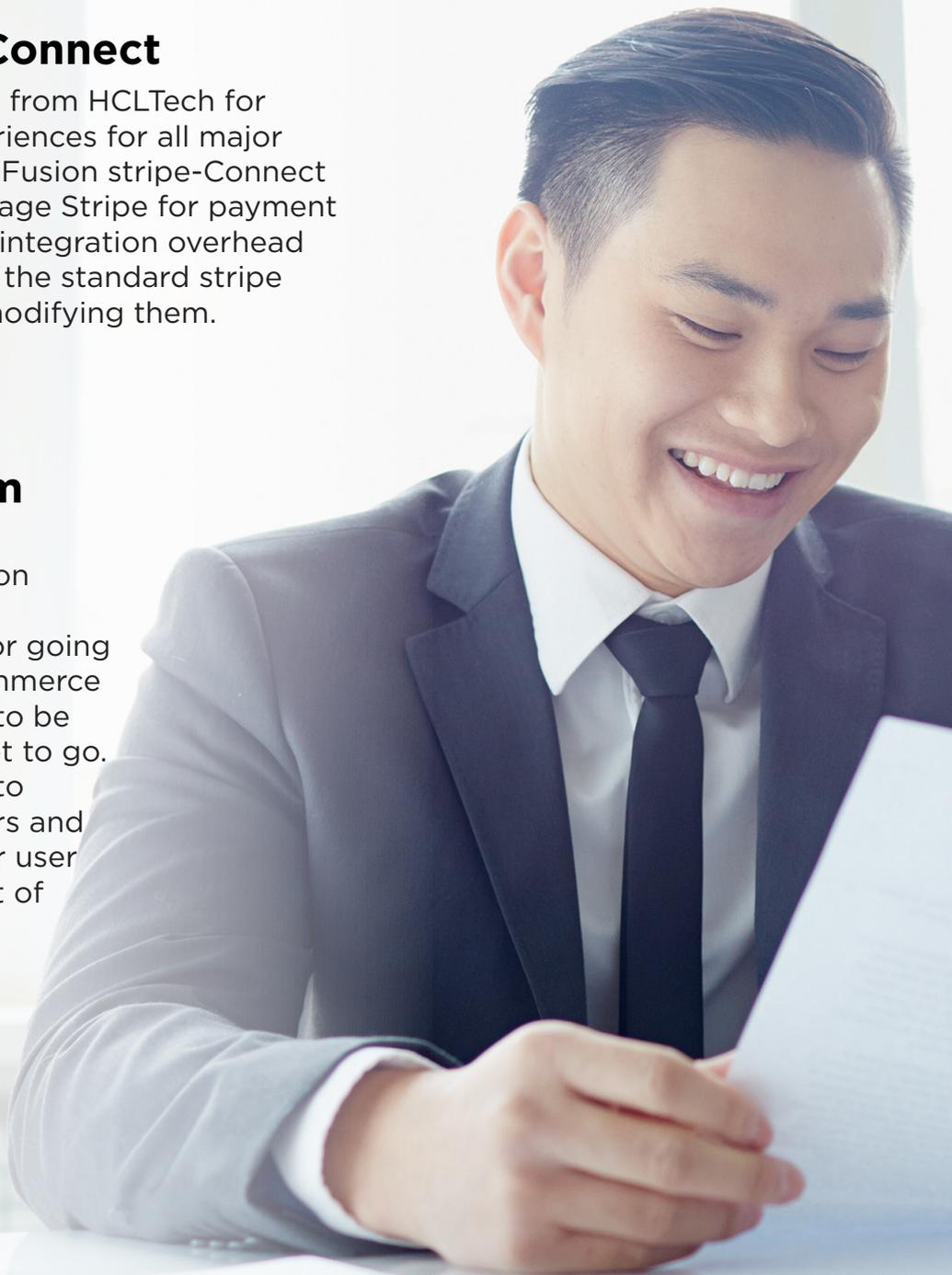
Innovation is the name of the game here, with the primary goal of streamlining the complete digital journey through excellent configurable flows while ensuring zero code, low cost, and faster time to market the digital experience. This solution reduces the time to market and cost by 50%, and the entire website can be developed by creating records in 5 objects.

## **InFusion stripe-Connect**

This is a prebuilt solution from HCLTech for seamless customer experiences for all major debit and credit cards. InFusion stripe-Connect helps businesses to leverage Stripe for payment collection without much integration overhead and enables them to use the standard stripe configurations without modifying them.

## **InFusion E-Comm**

Built on the Salesforce Experience cloud, InFusion E-Comm is a no-code plug-and-play solution for going live quickly with an eCommerce site. With only products to be configured, you are all set to go. We empower the teams to upload marketing banners and set navigations for better user experience, management of cases, and knowledge.



## **InFusion THoR (Touchless Hospitality & Reservations)**

With the risk of COVID, there is a considerable demand for touchless options. HCLTech's InFusion THoR (Touchless Hospitality & Reservations) solution helps the hospitality business to cater the touchless experience to their end customers by enabling unique QR codes and serving as a room key and providing service without guests reaching the concierge for any issues. This solution also ensures knowing the guest preferences and also includes a significant feature on Loyalty Management with data from various external systems like myHotelshop.

## **InFusion FIN-Trail**

For accounting, invoices are used as a source document. Invoices are used mainly to track all the sales transactions by any business organization with its customers. This accelerator helps create and design the invoices per the company's needs with a custom logo and design. Users can track the customer's previous data and cater to the customer's request to send the on-demand invoices with tax implementation. It also allows the users to send payment reminders. Currently, we do not have any app which does all this out of the box, so this will reduce the go-to-market time for the customers.

## **Infusion HPM Force+**

HCLTech's agile Project Management solution helps the project teams to implement agile methodology with relevant documentation. It also supports multiple screens for multiple project roles to ensure better productivity by prioritizing the tasks for the day and week on the screen along with many other features like risk anticipation, team velocity calculations, backlog burndown alerts, and prior effort feasible for a sprint. It also provides the capability to generate documentation for the project in multiple templates like BRD, TDD, Test plan, etc.



# Business Success with HCLTech & Salesforce

# 1

US Based World's Largest Tools & Storage, Security & Equipment Manufacture

## Challenge

To support Global Expansion, the client wanted a scalable Direct to Consumer model in place. Other Internal Salesforce applications lacked user adoption due to high complexity and customization. They also wanted to create engaging UI through Salesforce Lightning for internal users and to run customer-centric, DIY Store & Staff e-commerce.

## Solution

HCLTech brought the transformation by enabling B2C Commerce through the Salesforce Commerce Cloud, which helped re-design the Customer Service experience, including Salesforce Order Management. By migrating from Salesforce Classic to Lightning, HCLTech eased and streamlined the process and increased internal adoption to extract exciting customer engagement.

## Benefit

Apart from providing a 360-degree view of digital and connected commerce, HCLTech improved productivity and expertise in the UI and enhanced the CX. The client witnessed an increase in Annual Transaction Value (ATV) & Profitability and reduced cost and ticket elimination by almost 10%. The client pushed innovative solutions with improved brand promotion with a holistic view of the customers.

# 2

An American Corporation that Designs, Manufactures, & Distributes Engines, Filtration, And Power - Generation Product

## Challenge

The customer needed a comprehensive solution that could help it maximize sales opportunities via a structured sales process, gain a 360-degree view of the Customer, enable better accessibility to dealers and distributors, and allow accurate invoicing.

## Solution

HCLTech is the sole partner engaged in the customer's journey to cloud transformation and helped evaluate Salesforce as the cloud platform. Consulting on various architectural considerations like Salesforce org strategy, Salesforce governance, and helping build solutions around Sales, Service, Commerce, Community, and Force.com.

## Benefit

Our solutions helped the customer with a 15% reduction in engine service time, corresponding to saving 75 minutes per day for a service engineer. CSAT score for customer service increased to 80% from 40% within a year.

# 3

## Leading Global Professional Service Company specialized in Engineering and Technology for maritime industry

### Challenge

Our client lacked a single customer portal giving an overview of all the services offered. There were different points of entry to each application and some applications had poor performance. Company brand identity was missing throughout and there was inconsistent self-service. No ability to cross-sell or up-sell. There was a desperate need to develop a platform which was scalable and supported growth of Maritime digital offering while also providing a user experience that is best in class.

### Solution

HCLTech engaged in the customer journey to cloud transformation and helped evaluate Salesforce as the cloud platform by delivering several POCs on Salesforce products. We consulted on various architectural considerations like Salesforce org strategy, Salesforce governance etc. We simplified complex sales processes using Sales cloud and developed state-of-the-art service app on Force.com. Implementation of Customer Experience cloud for access to customers, technicians & government authorities. We also migrated custom field service solution to Field Service lightning. Integration with Boomi, AWS & other legacy systems.

### Benefit

With the support of HCLTech, our client was able to move away from obsolete systems towards application modernization. It reinforced a scalable architecture and simplified sales processes. The Customer Service Rep efficiency was improved and there was quicker turnaround. The adoption of modern applications resulted in intuitive UX, mobility and improved end customer satisfaction.

# 4

## A Leading German Energy & Utility Provider Company

### Challenge

Customer organization lacked 360-degree customer information for providing a better customer service team with no automated system operations or real-time visibility and integrations with internal systems and applications.

### Solution

HCLTech joined the customer digital transformation journey and implemented Service Console for the customer service center with Einstein Chatbot for auto case creation and responses to the customers. HCLTech implemented the Salesforce shield for encrypting customer-sensitive information along with multiple solutions using the Salesforce Marketing cloud.

### Benefit

HCLTech solutions have improved the customer Service Rep efficiency, set up automated communication to the customers, and made customer onboarding swift.

# 5

## Leading US-Based World's Largest Federal Credit Union

### Challenge

Our client was seeking solutions to address the presence of legacy applications slowing down the company's transformation as it was not adaptable to rising business needs. Our client wanted to develop dynamic business functionality with the OOB platform, enhance mobile-first user experience, support omnichannel solutions hosted on the cloud, and finally could monetize the final solution to other credit unions through the Salesforce ISV model.

### Solution

HCLTech drove transformation by delivering several Proof of Technology (POT) on Salesforce products and evaluated Salesforce as the cloud platform for customer engagement channels. Transformation of the sales process, customer services, and employee functions from the legacy application to the Salesforce platform and Financial Service Cloud. Through UX Consulting, implementing custom user experience using the lightning component library, and establishing DevOps operation, HCLTech is executing the transformation journey efficiently.

### Benefit

With the support of HCLTech, our client was able to move away from obsolete systems toward application modernization. It reinforced a scalable architecture and structured sales process with improved Customer Service Rep efficiency and found a quick turnaround for the process. The adoption of modern applications resulted in Intuitive UX and mobility and streamlined the deployment and release management process.

# 6

## Leading South African Bank and Financial Services Group

### Challenge

Our client was seeking solutions to enable Relationship Managers and C-Level employees to serve better to both institutional and individual customers using SF Financial Services Cloud in 18 Countries in 2 continents. Integration with multiple core banking systems and legacy applications. Automated customer onboarding & KYC to reduce the manual process. Existing tools were not able to provide the expected 360-degree view in multiple dimensions like customer, product etc. and integrations as expected.

### Solution

HCLTech implemented SF Financial services clouds features like Retail banking, Investment Banking, Insurance etc. and architected the end-to-end solutions for Customer Support, Sales Process enablement in different business groups and ensured customer 360 view for the required users. Unified view of customer and related parties including households with entire financial information like Banking, Investment and Insurance. Replaced legacy systems and applications through integration with core banking system. Implemented Experience Cloud for both Customer and Partner Self Service. Integration with existing mobile app with Salesforce & CTI integration with Amazon Connect.

### Benefit

With the support of HCLTech, our client was able to get 360 Customer view. Real time integration with core banking systems made the process smoother and efficient. Customer and partner self-service was enabled. Real time feeds were provided to update multiple systems

For any queries, please reach out to us at [digitaltransformation@hcl.com](mailto:digitaltransformation@hcl.com)



HCL Technologies (HCL) empowers global enterprises with technology for the next decade today. HCL's Mode 1-2-3 strategy, through its deep-domain industry expertise, customer-centricity and entrepreneurial culture of ideapreneurship™ enables businesses to transform into next-gen enterprises.

HCL offers its services and products through three lines of business - IT and Business Services (ITBS), Engineering and R&D Services (ERS), and Products & Platforms (P&P). ITBS enables global enterprises to transform their businesses through offerings in areas of Applications, Infrastructure, Digital Process Operations, and next generation digital transformation solutions. ERS offers engineering services and solutions in all aspects of product development and platform engineering while under P&P. HCL provides modernized software products to global clients for their technology and industry specific requirements. Through its cutting-edge co-innovation labs, global delivery capabilities, and broad global network, HCL delivers holistic services in various industry verticals, categorized under Financial Services, Manufacturing, Technology & Services, Telecom & Media, Retail & CPG, Life Sciences, and Healthcare and Public Services.



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As a leading global technology company, HCL takes pride in its diversity, social responsibility, sustainability, and education initiatives. As of 12 months ending on June 30, 2022, HCL has a consolidated revenue of US \$11.79 billion and its 211,000 ideapreneurs operate out of 52 countries. For more information, visit [www.hcltech.com](http://www.hcltech.com)