



Sakthi Finance invests in automation and engagement

Established in 1955, Sakthi Finance was created to handle financing for the automotive dealerships owned by Tata Motors. It has since become one of South India's leading Non-Banking Financial Companies specializing in finance for pre-owned heavy commercial vehicles and construction equipment. Long standing relationships have developed with customers by providing services with speed, flexibility and integrity. Salesforce is a partner in Sakthi Finance's digital journey to enhance these services and increase customer engagement.

"We see Salesforce as a platform in our quest towards our mission of providing customer lifecycle solutions. Our digital transformation roadmap is aligned to our mission of 'Total Customer Centric Solutions'. We are confident in achieving these objectives with the flexibility, capability and scalability of Salesforce as a customer centric platform", asserts Mr. Balasubramaniam, Vice Chairman & Managing Director of Sakthi Finance.

Automation provides launch pad for digital journey

Sakthi Finance began its digital transformation journey by first automating backend lending processes. It then turned to Salesforce to streamline the rest of the business, from lead creation to sales and all the way through to collections.

The company is getting close to achieving this goal, having replaced manual sales processes with Sales Cloud and enabling shared services teams with Service Cloud. The technology simplifies processes like pipeline management and order processing so customer facing teams can spend less time at their desk and more time meeting customers.

Equipped with the Salesforce Mobile App, reps can work effectively from anywhere and tap into a single view of the customer to tailor service. The seamless integration of information across the organization has enabled decision making and this empowered environment has enhanced Sakthi Finance's journey towards customer engagement and value.

"Salesforce has been a great enabler towards achievement of our visionary objectives, by enabling frontline reps to spend more time on value adding activities" said, Dr. Raveendran, CIO of Sakthi Finance.

"Salesforce helps bring predictability to business outcomes. The use of Einstein Analytics will improve on these predictions and help us make better data driven decisions." - MR PURUSHOTHAMAN | STRATEGY HEAD

Transparency across 50 branches

Sakthi Finance now has 300 employees who use Sales Cloud, including 160 frontline reps. It supports everyone to work in a more structured way with scheduled activities like weekly and monthly customer meetings. It also allows different teams to collaborate around the same data, with different teams identifying differing insights. These improvements result in a seamless experience for the customer and



better turnaround times. Management benefit from much greater transparency into the performance of sales and operations across all branches.

“Salesforce helps bring predictability to business outcomes,” said Mr Purushothaman, Strategy Head, Sakthi Finance. “The use of Einstein Analytics will improve on these predictions and help us make better data driven decisions.”

Raising the bar on customer engagement

With Sakthi Finance now experiencing the benefits of the Salesforce platform with increased business and customer insights, their focus is moving onto deeper customer engagement. Part of this digital journey is tracking customer lifecycle journeys and customer behavior using Analytics and AI , and mapping the entire value chain through integration of key stakeholders both within the group companies and external.

The next stage of this transformation journey is to keep the customer at the core of digital enablement and deliver ‘Total Customer Centric Solutions’ across the value chain. To enable this and to create the required knowledge and talent pool, Sakthi Finance has established a Salesforce Center of Excellence [COE] with Kumaraguru College of Technology, a reputed educational institution. Trailhead is also being leveraged to build on the Salesforce expertise in-house at Sakthi Finance.

“The Social, Mobile, Analytics and Cloud (SMAC) architecture provided by Salesforce improves our operational efficiencies and delivers meaningful information helping us support the growth of our customers more effectively, and create an integrated customer experience platform,” said Dr. Krishnaswamy, CTO of Sakthi Finance.