
salesforce
SUMMIT
PARTNER
CMMI
level 3
Codleo.
The Reinvention Ahead

Who We Are

Codleo.

- Experienced Team
- 8+ Locations
- CMMI Level 3
- Global Customers
- 120+ Employees

Services Portfolio

- Cloud Services
- Digital Solutions
- Analytics
- Mobility

Industry Footprint

- Hi-tech
- Healthcare
- Education
- Non-Profit
- Manufacturing
- Professional Services



Our Salesforce Service Stack

Codleo.

150+	81+	180+	275+	18+	500+	4.9/5	100%
Mature Practice	Technical Team	Happy Customers	Engagements	Solution Architects	Certifications	CSAT	Dedicated CoE

Integration Expertise

salesforce, pardot, Microsoft, Adobe, HubSpot, SAP

Global Presence

USA | UAE | AUS | IND | EUR



Partnership

Registered Partner 2020 APAC | Pledge 1% | Clutch | ISO 9001:2015 Company | ISO 27001:2013 Company | salesforce Summit Partner | CMMI Level 3 | salesforce Navigator Expert | salesforce appexchange partner

Core Capabilities and Competencies

- Accelerator & Plugin Kits
- Advisory & Consultancy
- Integrations & Migrations
- Product Development
- Industry Specific Solutions

Global Helpdesk | ITIL Aligned

- 24x7 L1 to L5 Support
- Omni Channel
- Incident Management Tool

Caliber

Codleo.

Challenges

- **Fragmented Patient Data:** Patient information was spread across multiple systems.
- **Coordination Issues:** Teams lacked seamless communication, affecting care delivery.
- **Inefficient Activity Tracking:** Real-time tracking of patient activities and progress was limited.
- **Logistical Challenges:** Delivering therapies to the right place at the right time was difficult.

Solution

- **360-Degree Patient View with Salesforce & Pardot:** Integrated patient data into Salesforce for a complete view, while Pardot automated patient communication, ensuring personalized follow-ups.
- **Seamless Team Collaboration:** Centralized platform enabled real-time coordination across therapists, coordinators, and support staff.
- **Real-Time Activity Tracking:** Salesforce tracked patient activities and engagement, enabling faster, more responsive care.
- **Salesforce Maps for Location Tracking:** Real-time location tracking optimized therapy delivery and scheduling.
- **Aligned Teams on Lead Management:** Salesforce and Pardot streamlined lead capture, nurturing, and patient intake.

Result

- **20% Improved Patient Satisfaction:** Personalized care and timely communications boosted engagement.
- **Increased Operational Efficiency:** Real-time location tracking and streamlined scheduling reduced delays.
- **Better Care Coordination:** Teams collaborated seamlessly, ensuring faster response times and improved outcomes.
- **Optimized Lead Management:** The intake process was more efficient, resulting in higher conversion rates from leads to active patients.

Codleo's Success Stories

Codleo.

Survey Response
Project Review

Product Area
Marketing Cloud

Industry
High Tech

Project Length (months)
2

Country
India

★★★★★ Jan 13, 2024 Salesforce Verified

My experience with Codleo has been nothing short of exceptional. From the outset, their commitment to delivering high-quality results has been evident in every interaction. Their expertise, professionalism, and attention to detail have consistently surpassed my expectations. The Codleo team especially Vineet and Ayushi has demonstrated a keen understanding of our unique needs and challenges, providing tailored solutions that have proven to be both innovative and effective. Their proactive communication and collaborative approach have fostered a seamless working relationship, creating a positive and productive environment. I wholeheartedly recommend Codleo to prospective clients seeking a reliable, skilled, and dedicated collaborator who consistently goes above and beyond to deliver outstanding outcomes.

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Survey Response
Project Review

Product Area
Service Cloud, Customer 360 Platform

Industry
Financial Services

Project Length (months)
2

★★★★★ Mar 29, 2024 Salesforce Verified

Partner are very knowledgeable about product and customization done it a way out of the box.

Project spoc performed exordinay well and clarified all doubts.

Partner working on solution documents rest all pointers are completed

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Thank You