
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

Rustomjee®

Codleo.

Challenges digital Engagement

Same phone number linked to multiple records (confusion in identification).
No secure way to fetch customer documents via WhatsApp.
Manual handling of common queries.
Missed chats when agents are offline.
No smart routing based on customer lifecycle.
Disconnected communication channels.
Lack of automated, personalized messaging.
Limited visibility into performance (no reports/dashboards).
No structured feedback collection.

Solution

Bot prompts users to select correct project if multiple records found.
OTP-based authentication via Marketing Cloud for secure access.
24/7 Einstein Bot handles FAQs, document requests, and service issues.
Sticky routing + 3-level escalation to ensure timely agent responses.
Smart agent transfer by customer lifecycle stage.
Automated WhatsApp messages via Salesforce Marketing Cloud.
Central chat logs and quick text/document sharing for agents.
Post-chat surveys and dashboards for performance tracking.

Result

Faster, 24x7 customer support.
Reduced agent workload and higher efficiency.
Personalized, timely communication at each stage.
Centralized and secure interactions via WhatsApp.
Better tracking, insights, and reporting.
Improved customer satisfaction and engagement.
Scalable and automated communication workflows.

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