
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

TOYOTA FINANCIAL SERVICES

Codleo.

Challenges Marketing & Service

- Disconnected systems for marketing and service management.
- Inefficient case management, agent supervision, and cloud telephony integration.
- Limited digital communication channels and inadequate automation of workflows.
- Complex user access management and lack of actionable reporting.
- Manual processes for welcome kits, interest certifications, and data migration.
- Inefficiencies in leasing, funding queues, application forms, KYC management, and NOC tracking.

Solution

- Deployed Marketing Cloud and Service Cloud for efficient campaigns and case management.
- Enabled Agent Console, Omni-Channel Supervisor, and cloud telephony for seamless communication.
- Integrated website, WhatsApp chatbot, and third-party tools for better digital engagement.
- Automated workflows, approvals, welcome kits, and interest certification processes.
- Implemented secure user access, advanced reporting, and optimized leasing, funding, KYC, and NOC processes..

Result

•Enhanced system integration and streamlined workflows for marketing, service, and operations.

•Improved agent efficiency, customer engagement, and seamless multi-channel communication.

•Increased automation, reduced manual effort, and better data accuracy through secure access and migration.

•Faster leasing and funding processes with actionable insights from advanced reports.

•Boosted overall operational efficiency and customer satisfaction.

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