

# Reinventing Customer Service with Real-Time Estimate Automation



## The Customer

A US-based manufacturing company specializing in polyethylene blown film and PVC solutions sought to enhance its customer service operations. Fragmented data systems and manual processes were impacting service delivery, estimate accuracy, and lead management.

## The Challenge

The client faced multiple inefficiencies due to disconnected platforms and manual workflows:

- Limited Visibility: Disconnected systems restricted real-time insights into customer and supplier interactions.
- Manual Data Entry: Lead tracking and project estimates were delayed due to manual Oracle-to-Salesforce transfers.
- Inefficient Lead Management: Lack of automation slowed customer service and caused estimation delays.

## The Solution

CriticalRiver delivered an end-to-end solution tailored to streamline digital operations:

- ERP Integration: Unified ERP financial data with Salesforce for a 360° customer view.
- Automated Data Transfer: Eliminated manual entry by automating Oracle-to-Salesforce data sync.
- Estimate Accuracy Scripts: Developed automation to deliver 100% accurate and faster project estimates.
- Real-Time Dashboards: Enabled call tracking and project monitoring through custom dashboards.
- Mass Data Updates & Emails: Implemented templates and scripts for consistent communication and data quality.

## The Results

Through CriticalRiver's Salesforce-led transformation, the manufacturing company eliminated manual bottlenecks, unified its data platforms, and streamlined its estimation workflows. The result was faster customer response times, enhanced supply chain visibility, and improved service quality—creating a competitive edge in a demanding market.

## Impact Delivered

- 50% Faster Estimate delivery time
- 40% Improvement in operational efficiency
- 30% Boost in customer satisfaction
- 100% Estimate Accuracy through automation

## Solution Components

- Salesforce CRM
- ERP Financial Data Integration
- JSON & Python Automation Scripts
- Windows Task Scheduler
- Custom Dashboards & Email Templates