



Deeper customer relationships powered by Salesforce

Explore our case studies

Impact where it matters.





Our philosophy

While customers expect hyperpersonalized experiences, many travel, retail and hospitality organizations aren't getting the insights and guidance they need from their customer relationship management (CRM) system. Instead, siloed processes, unsatisfactory implementations or hard-to-access data can leave opportunities on the table.

ZS and Salesforce work hand-in-hand to create an AI-powered pathway for customer engagement. By working with ZS to implement Salesforce to deliver insights-driven customer experiences, companies can craft brand strategies that build loyalty, drive growth and boost profitability.

If you're ready to deepen your customer relationships, ZS brings deep Salesforce know-how to translate customer insights into business value.

“Our team at ZS has been focused for years on using Salesforce solutions to help clients transform their marketing offerings and digital customer experience.”

–Pratap Khedkar, ZS CEO

Table of Contents

Our philosophy	2
Case study 1:	4
Commercial process improvement	
Case study 2:	6
Sales lead data extraction	
Case study 3:	8
CRM-enabled automation	
Case study 4:	10
Dynamic email automation	
Case study 5:	12
Personalized content models	
Case study 6:	14
Pricing calculator input modernization enablement	
About ZS	16



CASE STUDY 1

Commercial process improvement



A multinational industrial company adopts a customer-centric sales model



THE CLIENT

A North American steel producer sought to get the most out of its commercial processes

CHALLENGE

The client was missing margin targets despite having high-quality offerings and coveted market share. The company partnered with ZS to help overcome:

- **Product-first processes:** The lack of customer-centric commercial processes led to needs not being met and lost emerging market opportunities
- **Implementation fallout:** A failed CRM implementation didn't align commercial processes across business units and regions
- **Vague returns:** The lack of effective analytics left the company unable to track and measure portfolio performance

CASE STUDY 1

Commercial process improvement

THE SOLUTION

APPROACH

The company partnered with ZS to roll out Salesforce and:

- Design a new commercial engagement model for marketing, sales and customer service
- Institute business process mapping for all commercial processes across sales teams and regions and align with Salesforce best practices
- Activate future commercial processes on Salesforce, integrating key enterprise systems and CRM analytics
- Develop change management initiatives to ensure sustained coordination, effective execution of transformation efforts and adoption of the new CRM

IMPACT

- **Inside sales**
17% volume increase sold to existing accounts
- **Key accounts**
14% volume increase sold by key account sales reps
- **Customer service**
25% improvement in the number of orders managed by customer service teams



CASE STUDY 2

Sales lead data extraction



A prominent hotel brand increases speed to market with improved CRM



THE CLIENT

A global hotel and resort brand sought to simplify and organize sales lead data for more efficient conversions in Salesforce

CHALLENGE

The client, a global hotel and resort brand, faced several challenges, including:

- **Complicated structure:** A complex system of incoming leads with unique required information handled through multiple platforms
- **Inefficient intake:** Each lead was manually reviewed and recorded and then viewed by several support teams, requiring significant time and labor investment

CASE STUDY 2

Sales lead data extraction

THE SOLUTION

APPROACH

ZS extracted and organized sales lead data and simplified processes for lead conversion to:

- Identify automated methods to rapidly ingest leads from email or the CRM
- Build guided flows for direct opportunity and related records creation
- Identify machine learning models, algorithms and heuristics to extract metadata from structured and unstructured data sources

IMPACT

- **Speed**
5% reduction in time under review in North America and **19%** in Asia-Pacific, freeing up the supporting team for other value-adding activities
- **Continuous improvement**
~1,000 images processed in two days. Scalable architecture enables expanding the solution with new audit requirements, contract types, regions and languages

CASE STUDY 3

Dynamic email automation



A multinational home improvement retailer elevates communication and revenue with repeat customers



THE CLIENT

A large home improvement retailer sought to improve one-to-one communication with its most loyal and attentive consumers

CHALLENGE

A multinational home improvement retailer boasted extensive email reach but lacked a system to dynamically inform frequent shoppers about drops in prices. It needed a partner to help:

- Harness product and consumer data in tandem with extensive email reach to create an ecosystem of frequent customers and their preferences
- Develop a dynamic daily lower price trigger email program to drive more revenue from the most loyal customers

CASE STUDY 3

Dynamic email automation

THE SOLUTION

APPROACH

ZS addressed initial challenges while also establishing a sustainable, scalable email marketing strategy that significantly boosted engagement. We:

- Collaborated closely with the client team to leverage high-quality data analysis and targeting
- Monitored and analyzed daily price fluctuations of more than 1 million products over a 30-day period
- Created a highly personalized, automated daily email experience for shoppers, matching the most recent qualifying price drop to be featured in the message
- Incentivized customers to click through emails by highlighting price drops alongside urgency messaging to encourage immediate action

IMPACT

- **Revenue generation**
108% increase in spending by recipients of the promotional email
- **Higher productivity**
89% higher revenue per email
- **Improved KPIs**
58% increase in open rates
38% increase in click-through rates

CASE STUDY 4

CRM-enabled automation



A fast-food company uses a redesigned CRM solution to improve efficiency and transparency



THE CLIENT

A national fast-food chain sought to implement a CRM solution to enhance automation, data capture and overall accountability

CHALLENGE

A North American fast-food chain wanted to implement a CRM solution that would automate and standardize store visit processes, improve data capture and enhance overall transparency and operational efficiency. It needed help with:

- **Difficult logistics:** Time-consuming and error-prone manual processes slowed scheduling, inspections and follow-ups
- **Lack of transparency:** Limited visibility into inspection outcomes hindered compliance assessment and delayed corrective actions
- **Limited data:** Inconsistent reporting with fragmented data collection created challenges in tracking compliance trends

CASE STUDY 4

CRM-enabled automation

THE SOLUTION

APPROACH

ZS designed and implemented a comprehensive CRM solution tailored to the specific needs of retail franchise operations, including:

- **Store visit forms:** Custom CRM forms standardized inspection data on product quality, hygiene and service, accessible on any device for real-time entry
- **Inspection scheduling and management:** Automated reminders and scheduling prioritized visits based on compliance, performance and location
- **Improvement plan attachment:** CRM-enabled linking of corrective action plans to compliance gaps, with progress tracking and automated follow-ups for timely resolution
- **Reporting and analytics:** Real-time reports and dashboards provide insights on compliance and improvement, supporting data-driven decision-making

IMPACT

- **Enhanced efficiency**
Automated scheduling and standardized forms reduced manual effort, enabling more visits and quicker compliance resolutions
- **Greater transparency and accountability**
Centralized data and attached improvement plans increased transparency and accountability, boosting compliance and store performance
- **Data-driven decisions**
Real-time insights and analytics empowered the client to prioritize high-risk stores, allocate resources effectively and consistently enhance operational standards

CASE STUDY 5

Personalized content models



A premium cruise line drives higher engagement with its customers through data-driven dynamic modules



THE CLIENT

A premium cruise line sought to improve personalized communication and maximize relevance

CHALLENGE

A premium cruise and entertainment organization wanted to boost customer engagement through one-to-one communication. It needed a partner to:

- Implement advanced dynamic modules to deliver highly personalized content based on individual subscriber behavior and status in Salesforce
- Maximize the relevance of each message and enhance interaction rates without adding to overall email frequency

CASE STUDY 5

Personalized content models

THE SOLUTION

APPROACH

ZS focused on key strategies to drive impact by:

- Developing cutting-edge data-driven modules to deliver hyperrelevant content tailored to individual subscriber behavior and status, ensuring every message resonated with its recipient
- Implementing targeted messaging strategies for loyalty members, recent bookers and key milestones, achieving significant engagement uplift without increasing email volume
- Crafting adaptable modules that effortlessly integrated into existing email templates, incorporating intelligent communication rules to avoid message conflicts and dynamically adjust based on relevance

IMPACT

- **Improved metrics**
46% boost in click-through rates
60% boost in click-to-open rates
- **Streamlined communication**
Achieved higher interaction levels without increasing email volume, optimizing the impact of each communication
- **Clear messaging**
Easy-to-integrate modules reduced complexity, preventing message overlap and ensuring smooth campaign execution

CASE STUDY 6

Pricing calculator input modernization



A food delivery platform increases sales rep efficacy with an enhanced pricing calculator ecosystem



THE CLIENT

A major online food provider sought to automate and streamline pricing calculator methodology, tracking and analysis

CHALLENGE

A major online food delivery partner used an offline, spreadsheet-based pricing calculator that was difficult to track and maintain, leading to decreased efficacy for sellers. It needed a partner to:

- Standardize pricing methodology within the organization and across regions
- Automate deal input populations into multiple platforms, including the calculator and Salesforce.

CASE STUDY 6

Pricing calculator input modernization

THE SOLUTION

APPROACH

ZS developed an automated, streamlined mechanism to improve the efficacy of the pricing calculator, including:

- Integrated online processes to reduce duplicated work—from populating information to approving offline rate cards
- Improved visual graphical representation of deal profitability and enhanced ability to compare actual results to the initial forecast
- A scalable calculation engine for smart evaluation of deal-level attributes and multiple profitability scenarios on each quote
- A streamlined approval process with scalable and configurable guardrails and an automated approval mechanism

IMPACT

- **Global performance**
2,000+ users onboarded across jurisdictions, including sellers, managers and analysts
- **Faster deals**
~20% to 25% reduction in closing times
- **Improved accuracy**
End-to-end pricing and quote automation led to decreased revenue leakage



About ZS

ZS is a management consulting and technology firm that partners with companies to improve life and how we live it. We transform ideas into impact by bringing together data, science, technology and human ingenuity to deliver better outcomes for all. Founded in 1983, ZS has more than 13,000 employees in over 35 offices worldwide. To learn more, visit www.zs.com or contact us [here](#).

Explore Salesforce

Book a demo



About our Salesforce partnership

With the power of Salesforce, ZS helps organizations accelerate go-to-market strategies, optimize operational costs and transform the digital customer experience. ZS is an Agentforce Partner, working with clients to leverage the combination of existing agents in Agentforce, Salesforce Data Cloud, partner agents and custom-built agents. ZS is also an Alliance Migration Partner, a coalition of worldwide agencies and consulting partners that guide customers through a seamless transition to Salesforce Life Sciences Cloud, while maintaining backward compatibility.