

Automate tasks tied to Salesforce

Sales productivity is the top challenge for 65% of sales organizations. Sales reps spend more than half their time on non-revenue generating activities. Intelligent automation can help.

Use cases

1. Automate data entry across systems

For customer service and sales agents, swiveling between multiple systems to copy and paste data distracts them from interacting with customers. This frequently leads to long wait times and low customer satisfaction. With a native button embedded in Salesforce, however, ten clicks can turn into one. For a call center employee, for example, a single button in the Service Cloud user interface might trigger an automation that grabs a customer's account ID, authenticates the caller, and then transfers customer information from legacy software or a third-party system into Salesforce, saving precious phone minutes. For salespeople, that same Service Cloud button might trigger an automation pulling in past purchase history or demographic data, which would make a cross-sell or next-best-purchase recommendation more clear.

2. Automate common customer requests

Many incoming messages from customers are repetitive and include requests like price quotes, address changes, and service or contract cancellations. These are low-level, repetitive tasks that take sales reps and brokers away from their core work duties.

\$3T

HBR says wasted time and inefficient processes cost the U.S. economy \$3 trillion each year.

5.5 hours

CRM users spend 5.5 hours each week logging activities and updating contacts.

Luckily, they're also easily automated. Automation Hero lets a company create its own AI model to scan and understand the intent of a human message. Based on that intent, the software can then automate a response to that request and route it to the proper department. Or it can automatically update, for example, an address in Salesforce using field mapping technology.

3. Maintain data quality in Salesforce

Companies rely on their employees to input valuable customer data into Salesforce. Much of this data is entered inaccurately or not at all. Automation Hero's fast-growing list of more than 50 connectors to data sources includes (but isn't limited to) email, calendars, CRMs, Hadoop Distributed File System (HDFS), Amazon Web Services (AWS), and Google Cloud. If a salesperson has been corresponding with a new contact but forgot to upload the contact into Salesforce, we can create an automation that detects the new information and writes it into the database within a few seconds. The updates can run as unattended, meaning automatically, or attended, meaning updates are reviewed by the salesperson.

4. Turn unstructured data into structured data

Handwritten notes, requests, receipts and financial statements (just to name a few) all cost businesses time and money to process. Reviewing such documents manually and extracting information is also incredibly tedious. That makes these tasks great candidates for automation.

Let's say an employee needs to process a large number of invoices. The employee sends the invoices via email to the Automation Hero backend. An AI model then detects information in the attachments and extracts it. This can include amounts, dates, vendors, etc. Through our native Salesforce Service Cloud integration, the employee can also see if a vendor already exists. If not, Automation Hero will create that vendor within the database. Ultimately, the employee sees a screen in Salesforce showing each invoice and its status.

What is Automation Hero?

Automation Hero's end-to-end automation platform for the modern enterprise combines screen scraping, structured and unstructured data processing, machine learning, and the human workforce. It's an operating system for automation — intelligently automating everything from simple tasks to complex business processes. This improves information worker productivity and drives more successful, optimized business outcomes. Its powerful backend focuses on three key areas: eliminating repetitive and time-consuming tasks, automating common asks and augmenting employee decision making.