

HEXAWARE

Hexaware's Salesforce Capabilities

Headless by design. Governed by default. Agentic revenue operations for financial services, life sciences, and hi-tech—without loosening a single control.



What opens up. What stays governed.

Your CRM stopped being a place people log into. Headless 360 lets an agent resolve a case inside Slack, price a renewal from a partner portal, or pull an investor record into a third-party AI client. For revenue teams in regulated industries, that removes a real constraint: you could only ship the experience the platform's own interface allowed.

Every new surface is also a new way into your org, raising the same questions: who acted, what were they allowed to touch, and can you produce the record six months later. We answer those first, then build fast. Those answers, written down, are the boundary.

Three things we do differently:

- We put agents where the revenue moves — pricing a phase III bid, matching a fund to an investor profile, and calculating a mid-term co-term are revenue events with regulatory exposure attached. That is where we deploy, and where we draw the approval gates.
- We scope the boundary before we scope the build — which agent acts as which identity, which tools it can invoke, which actions require a licensed human's sign-off, tied to SEC and FINRA, GxP, HIPAA, or SOC 2, handed to you as a document your auditor can read.
- We keep proving it after go-live — session tracing, custom scoring evals, and Agentforce Testing Center run as standing instrumentation, not a launch checklist. Behavior drift surfaces in a monthly report, not a regulator's letter.



One estate. Four layers. Every one of them governed.

Enterprises don't buy clouds anymore—they buy a chain of custody from data to decision to surface. Here is where Hexaware works along that chain.



THE CONTEXT LAYER

Data 360 · Analytics & Tableau · MuleSoft

Agents inherit whatever context you give them, including the gaps. Hexaware unifies advisor, sponsor, and subscriber data with identity resolution that holds across regulated boundaries—so an agent reasoning over a portfolio or a protocol works from a profile your compliance team has already signed off on.



THE REASONING LAYER

Agentforce 360 · Customer 360 Apps · Sales, Service, Marketing · Revenue & CPQ

This is where Hexaware earns the RevOps claim. Summarizing a record is a demo. Hexaware deploys agents into the steps that price, match, and renew—then decides explicitly what the agent settles, what it recommends, and what a licensed human must approve before it reaches a customer.



THE SURFACE LAYER

Financial Services Cloud · Health Cloud · Life Sciences Cloud · Einstein Trust Layer · Shield

Define the capability once, then render it where work already happens: an advisor portal that looks nothing like a CRM, a sponsor bid workspace, a case resolved inside a Slack thread. Same permissions, same sharing model, same audit trail on every surface you open.



THE COMPLIANCE LAYER

Headless Experience Layer · Experience Cloud · Commerce · Slack · React

Industry clouds carry the data model your regulator expects. Hexaware extends them rather than rebuilds around them. Consent management, suitability checks, and GxP-relevant logging stay native instead of living in custom objects nobody wants to defend during an inspection. Controls mapped to SEC, FINRA, HIPAA, GxP, and SOC 2.

Success Stories



Private Equity / Wealth Management

Governing Investor Access Across a Wealth Advisor Network with Agentforce

The client needed to match complex fund structures to investor profiles across a distributed wealth advisor network, ensuring strict data access controls. No agent could retrieve a record its acting user was not authorized to see—making compliant automation a core design requirement.

Solution

- Deployed Agentforce agents to match fund structures to the right investor profiles across the advisor network.
- Implemented identity-aware access controls so no agent can reach a record that its acting user cannot see.
- Unified advisor, sponsor, and subscriber data using Data 360 with identity resolution across regulated boundaries.
- Integrated advisor onboarding into a governed agentic workflow with compliance controls built in from day one.



30%

reduction in advisor
onboarding cycle

Clinical Research / Contract Research Organization

Accelerating Phase Bid Modeling for Clinical Trials with Agentforce

The client, a top-tier CRO, faced slow and manual phase bid modeling across complex clinical trial protocols. Each bid required parsing protocols, assembling cost components, and securing licensed human pricing approval—a process agents compressed from weeks to days while keeping every step traceable.

Solution

- Deployed agents to parse trial protocols and automatically assemble phase bid models using Agentforce 360 and CPQ.
- Gated all pricing decisions to a licensed human reviewer, ensuring full regulatory compliance and auditability.
- Made every bid component fully traceable, supporting oversight requirements across the clinical research workflow.
- Reduced bid turnaround from four weeks to five days while maintaining human approval at every pricing gate.



82%

reduction in bid
turnaround time

Enterprise SaaS Company

Headless Customer and Partner Portal with Agentic Revenue Operations

The client needed a branded portal for customers and partners that operated independently of the Salesforce UI, while enabling agents to monitor consumption telemetry, trigger expansion offers, and calculate mid-term co-terms—all without modifying core CRM code or loosening any access controls.

Solution

- Built a headless customer and partner portal using the Headless Experience Layer and React, independent of the Salesforce UI.
- Deployed agents to monitor consumption telemetry and automatically trigger targeted expansion offers.
- Automated mid-term co-term calculations without touching core CRM code, preserving system integrity.
- Applied the same permissions, sharing model, and audit trail across every surface via the Surface Layer.

A man and a woman in business attire are looking at a screen. The man is pointing at the screen. A data callout box is overlaid on the image.

12%

increase in net
revenue retention

Global Investment Firm

Optimizing Investor Relations and Deal Management with Salesforce

The client lacked a unified platform to manage leads across multiple channels, resulting in inefficiencies across customer onboarding, ongoing access, communications, and deal closure. These processes were fragmented and difficult to scale, limiting visibility, consistency, and data-driven decision-making. The objective was to streamline private wealth management by improving investor engagement, portfolio oversight, and operational efficiency.

Solution

- Automated lead capture and onboarding workflows in Salesforce to enable consistent, multi-channel processes.
- Streamlined onboarding by integrating KYC workflows and a secure virtual data room for document sharing.
- Centralized investor records, including preferences and communication history, to support personalized engagement.
- Enhanced deal closure with real-time status updates, enabling informed decisions and smoother transitions.
- Leveraged Salesforce analytics to deliver actionable insights into portfolio performance and investor behavior.
- Improved collaboration and integration with Workday, PeopleSoft, CVENT, ELM, and CTI within the wealth management ecosystem.

A woman with blonde hair, wearing a blue button-down shirt, is standing and talking to another woman who is seated and facing her. They are in a professional setting, possibly a meeting room, with a whiteboard visible in the background.

10+ hours

reduction in onboarding
time (from 120+ hours)

22,000+

clients supported with
efficient investor management

Global Financial Markets Infrastructure Leader

Customer Experience Transformation with Salesforce Einstein, Experience Cloud, and Service Cloud

The client needed to reduce Mean Time to Resolve (MTTR) for customer support cases while ensuring compliance with the Digital Operational Resilience Act (DORA). The objective was to implement efficient contract and document management, and to elevate customer experience through intuitive, responsive, and proactive services with seamless user experiences.

Solution

- Built a customer portal with personalized self-service features using Experience Cloud and Service Cloud.
- Implemented Einstein Case Classification for automated case categorization and skill-based routing for efficient assignment to support agents.
- Deployed an Einstein chatbot to handle FAQs and troubleshooting, with continuous improvements driven by feedback in Salesforce Service Cloud.
- Configured DocuSign and Salesforce to manage DORA addendums, ensuring compliance and streamlined contract handling.
- Developed a centralized portal for DORA requests using Service Cloud and ServiceNow, with automated workflows and task allocation, including CCS service tagging in Salesforce.
- Leveraged customer insights and AI to drive smarter, data-driven engagement.

60%

improvement in
customer experience
performance

30%

reduction in Mean
Time to Resolve
(MTTR)

22%

reduction in
manual effort

Collective Management Organization

Simplifying Complex Music Licensing with Intelligent Automation

The client needed to automate the configuration and pricing of complex music licensing agreements across diverse usage scenarios. The goal was to simplify quote and order generation for both internal teams and customers, enhance self-service experiences, implement dynamic pricing models, reduce manual intervention, and accelerate quote turnaround times.

Solution

- Automated licensing configuration and dynamic pricing using Salesforce CPQ to streamline complex workflows.
- Enabled self-service quote and order creation for customers through Experience Cloud.
- Implemented guided selling and conditional discounting rules to simplify decision-making and ensure pricing accuracy.
- Developed custom templates and advanced pricing models to auto-populate data and dynamically adjust fees.

20%

improvement in
revenue
realization

60%

reduction in
manual errors

40%

faster customer
onboarding

Collective Management Organization

Enhancing Customer Service with AI-Driven Case Summaries and Sentiment Analysis

The client wanted to improve customer experience by providing concise, intelligent summaries of customer service cases. The goal was to include up-to-date sentiment analysis based on the latest interaction history, enabling service teams to respond faster, with better context and greater accuracy.

Solution

- Implemented Agentforce to automatically generate case summaries, improving agent productivity and customer experience.
- Analyzed customer interactions to deliver continuously updated sentiment insights based on the most recent history.
- Enabled faster, more informed customer service responses through automated, AI-driven insights.



14%

reduction in
customer churn



Interested in accelerating your business outcomes?

Let's start the conversation. Reach us today at **marketing@hexaware.com** and discover how our expertise can accelerate AI adoption across your enterprise.

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at <https://www.hexaware.com>.

Get in touch