

Fortune 500 Finserv Leader Saves \$400k a Month with Self-Scheduling



Struggle to Support Efficiently

The company's customer support team services payment processing clients. One of their major functions is to schedule product installations and training.

Productivity was becoming an issue. Internal analysis revealed that it was taking too much time for support agents to schedule clients for their installations. The company's support team of thousands was spending countless hours calling or returning calls to book installations.

This process was reducing time actually spent on customer support. Not only were the agents becoming less productive, the quality of their customer service was also slipping.

Improving the Support Experience

The company uses a customized platform in tandem with Salesforce® as their CRM. As a Salesforce native application, SUMO proved to integrate seamlessly with their Salesforce org, workflow and customized platform.

SUMO's self-scheduling feature solved the delays that payment processing equipment clients were experiencing when trying to schedule their installation and training appointments. In turn, the customer support team also no longer was spending large amounts of their day calling or following up with clients to set their appointments.

SUMO's multi-functional scheduling platform helped the company to immediately correct the issues the support team was having with manual scheduling appointments.



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Customer Support Upgraded

Once approved for installation, clients now book appointments without waiting to talk with or receive a callback from a customer support agent.

Self-scheduling reduced the support team's workload by 47% without disrupting their workflow or any additional customization. By giving their clients the ability to self-schedule at their convenience, the Finserv company also experienced an improvement in client satisfaction.

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The Numbers

\$400k

savings per month for the call center with the addition of scheduling automation.

+47%

reduction of support team's workload allowing them to focus on other revenue-generating activities.

"SUMO is automating a problem that costs the organization up to \$400K a month."

*Robert
Vice President, Process Management*

