

keste

Go Digital. Go Modern. Go Keste.

Keste Case Study:

TaskUs

Salesforce Reconfiguration Expands Capabilities, Drives User Adoption, and Supports Rapid Growth

Challenge

Our client, leaders in next generation customer experience outsourcing, needed their own customer support processes to be exceptional. But outdated infrastructure and poor integrations meant their teams were suffering from poor data reporting, disconnected client relationships, and overly complex and inefficient processes.

Under the old system, teams used a variety of poorly integrated 3rd party tools — resulting in difficult data collection processes and challenging team communications. As a result, the company found it impossible to efficiently analyze lead, pipeline, sales, and marketing data to uncover trends that would support smarter business decisions.

Solution

A system that facilitated team collaboration and provided a streamlined customer experience was the path forward this company needed.

First, data collection and delivery were streamlined through the correct mapping of data – this simplified processes and helped to ensure data accuracy going forward. Next, enhanced reporting and multi-level dashboards were established and made easily accessible across the company. To support better reporting, a hierarchy relationship was created between leads and accounts, establishing consistency between teams. Finally, record types and page layouts were optimized to improve customer experience.

Products leveraged:

- Salesforce Sales Cloud
- Einstein Analytics

Results

TaskUs' Salesforce reconfiguration provides a streamlined, automated sales process that supports both company and customer growth.



Optimized User
Experience



Improved
Cross-department
Collaboration



Advanced
Reporting
Capabilities