

keste

Go Digital. Go Modern. Go Keste.

Keste Case Study:

Word & Brown General Agency

For more than 30 years, the Word & Brown General Agency has connected individuals and businesses to industry-leading health insurance and employee benefits solutions. Brokers have relied on Word & Brown to build and strengthen client relationships for decades — but newer brokers were experiencing a slow learning curve due to the Agency's outdated mainframe system.

Challenge

Limited reporting abilities caused massive headaches, and younger reps weren't selling at the top of their abilities. In addition, service team managers had limited visibility to their teams' tickets and were unable to accurately track SLAs and wait times.

The Agency was anxious to update their technology and take a step into the future with a new, cloud-based system. However, integrating with legacy systems would be critical for a successful implementation. Word & Brown asked Keste to create a custom cloud solution that would be easy to use, with improved data and reporting capabilities.

Solution

Keste created a Salesforce Service Cloud solution that integrated with legacy systems. Users were delighted at the modern interface and how easily they could access their data, and noticed an increase in report usage and service ticket traceability. Keste's solution included the following features:

- Salesforce Service Cloud
- Telephone and Email Integration
- Data Loader
- Single Sign-on

Results

Keste delivered a modern, up-to-date user interface with advanced data and reporting capabilities to accelerate growth.



Improved
Data
Visibility



Faster Service
Call Response
Time



Easy-to-Access,
Improved
Reporting



Increase
in Report
Usage