



Keller Williams Streamlines Support for Five Business Units on Service Cloud Lightning



Challenge

Keller Williams was a Desk.com customer for 7 years and had grown accustomed to the functionality limitations and relying on workarounds to get things done

Multiple groups using (5) separate instances of Desk.com with multiple data loads pulling from various units

Excessive use of labels, filters, and macros to manage tracking and routing to groups

Solution

Configero deployed single, unified instance of Service Cloud Lightning with advanced permission sets and security profiles to manage support groups, including: KW International, Legal, Security, Finance and KW Worldwide

Migrated select case data for all groups from Desk.com orgs to align with consolidated Service Cloud groups/profiles

Rolled out Lightning Knowledge for help centers and Service Cloud Lightning Reports & Dashboards for more meaningful agent performance monitoring and coaching

Lightning Knowledge

Service & Support Analytics

100 full-time agents

8 Weeks to Go-Live

