



BIBERK IMPLEMENTS FULLY INTEGRATED SALES AND SERVICE SYSTEMS

Seamless CRM integration in order to create a single view of the customer.

About the Client

Based in Omaha, Nebraska, BiBerk is a business insurance company offering a range of coverage options from workers compensation to commercial auto. It works primarily with small businesses and is a part of Warren Buffet's Berkshire Hathaway Insurance Group.

Opportunities

BiBerk wanted to create a more organized and consistent process for following up with leads. It wasn't syncing leads directly from its website to its CRM, and it lacked the ability to track opportunities through the entire pipeline.

It was also looking for a customer service platform that could integrate seamlessly with its CRM. The close integration would better align its sales and service teams by creating a singular view of the customer.

Improving Pipeline Management

As new leads are created through the website, they are automatically assigned to sales reps on the BiBerk team. This was accomplished through workflows in Sales Cloud.

PK worked with the sales team to help them better define their process for nurturing a deal. Together, we determined the stages that make up a typical sales engagement.

We configured Salesforce so that opportunities could be tracked as they progress through each of these stages. We also leveraged Sales Path, a feature that lists each stage at the top of an opportunity and provides tips and instructions to the sales rep.

Facilitating Case Management

Service Cloud provided the BiBerk customer service team with a central hub for managing customer support tickets. Sales Cloud data could be accessed directly in Service Cloud, removing the need to enter the same customer information in multiple systems.

Service Cloud Knowledge was deployed to serve as a resource center for agents seeking common solutions to customer issues. We also configured Live Agent, a live chat feature that can be managed inside Service Cloud.

Reports were built which allowed management to easily track the team's caseload and productivity.

Results

Implementing Service Cloud and Sales Cloud enabled BiBerk to increase its volume in customer service and sales for each team member. They also created a more holistic view of the customer, centralizing multiple touch-points onto a single record.

The introduction of unified sales and service systems has allowed the organization to work more cohesively and to draw on a more complete context when serving customers.



Learn more about our Salesforce capabilities.