CapTech.

International Retailer

Case Queue Resolution/Administration

An international retailer lost time and accuracy with pre and post-sales issues. The existing process created limited visibility and distrust within their selling organization to the accuracy of the statements and lack of trust to how and when reconciliations would be handled. Without a formalized escalation process, the selling organization did not have clear visibility on status or potential resolution timing.

- Implemented web to case process from legacy environment

- Enhanced existing Salesforce pages with quick create links for case creation.

- Designed assignment and escalation rules for routing assistance.

- Organized cases in queues for simpler assignments and the ability to track open issues.

- Designed reports and dashboards for tracking and visibility to the selling organization and support leaders.

- Instituted notifications at every stage and visibility to an appeals process.