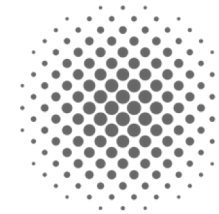




**SILVER SOFTWARES**  
FROM CONCEPT TO CLOUD



**CHETWOOD**  
FINANCIAL LIMITED

Service Cloud Implementation  
with Live Chat, Knowledge,  
Omni-channel, and Community  
Cloud

10 / 10



## Customer Satisfaction

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As an experienced Salesforce Partner, we take pride in the many businesses we have helped grow with the Salesforce platform.

200+

Salesforce customers

300+

Successful Projects

70+

Salesforce Certifications

100%

Successful Delivery

# The client: Chetwood Financial

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CHETWOOD  
FINANCIAL LIMITED



LOCATION

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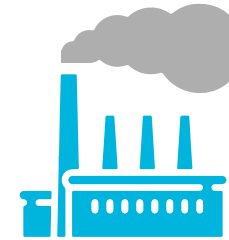
Wrexham, UK



EMPLOYEES

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130



INDUSTRY

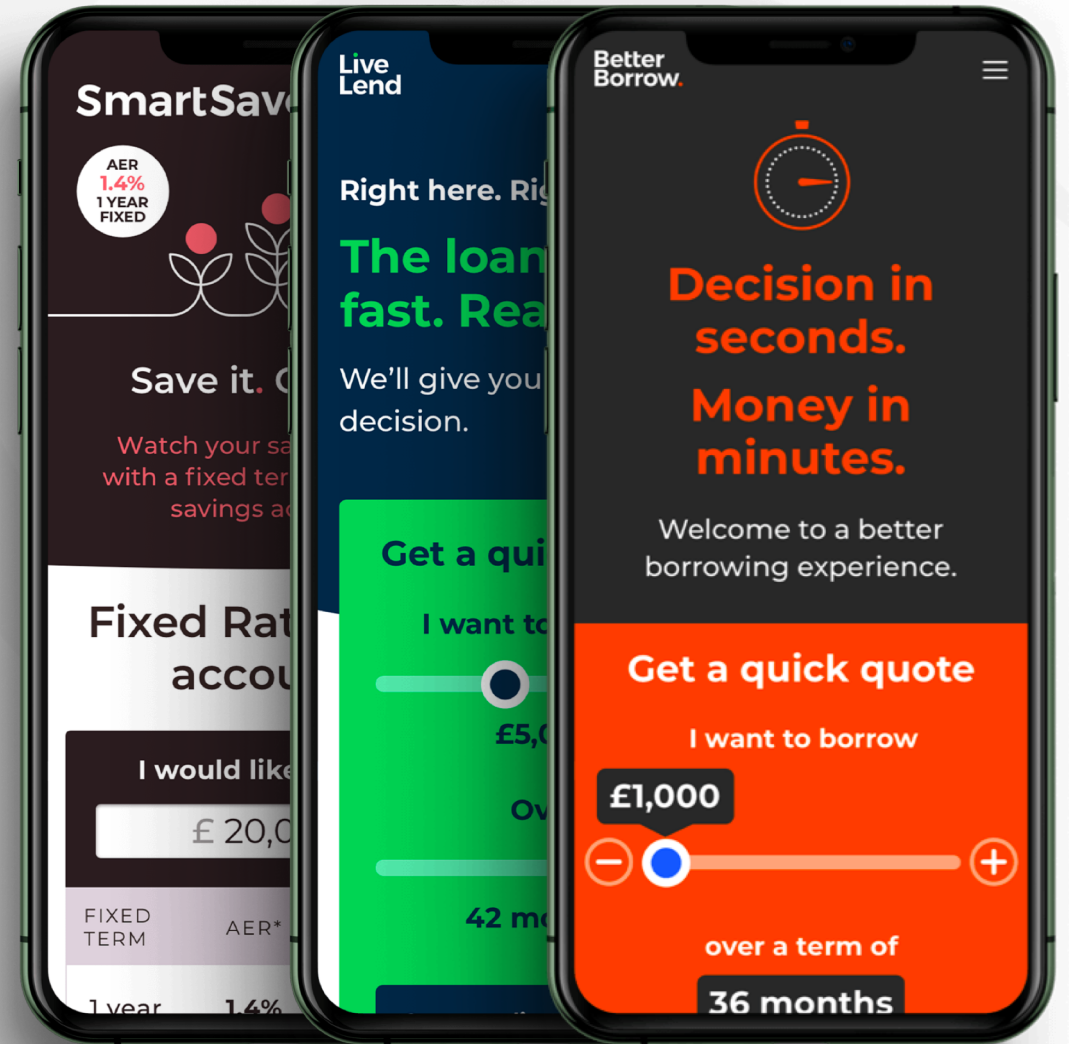
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Banking

# Company Bio

Using technology to make people better off, Chetwood Financial is a digital bank dedicated to designing and manufacturing unique and dynamic products that make engaging with personal finances easier than ever before for their customers. Unlike traditional banking models, Chetwood Financial strive to create products that are right for each customer segment, rather than building one product to serve all.

With a multi-brand strategy, Chetwood Financial are able to bring industry challenging products such as LiveLend and SmartSave to the ever growing online banking market.



# The Challenges

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With the upcoming release of their new product 'SmartSave', Chetwood Financial came to us in need of a platform that could accommodate their existing products with those soon to be available. They already had an existing Salesforce system for their previous product 'LiveLend'. The idea was to create a system that could manage multiple brands, segmenting Service Cloud in such a way that users are able to work with multiple products simultaneously.

Though there are different products, there would be times such as reporting when all brands would be relevant. This need called for the system to allow users to manage the different products effectively in the same Salesforce instance while still enabling management to be able to report across the entire business.



## CASE MANAGEMENT

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Service Cloud



## SELF SERVICE

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Live Chat/Knowledge



## CASE ROUTING

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Omni-Channel

# How we helped / The Solutions

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Salesforce Service Cloud was already in use at Chetwood Financial, it just needed extending to support their multi-brand strategy without fragmenting the systems and processes which were already in place, and some additional products to further augment the existing system.

Standard Salesforce tools such as Omni-channel case routing, Live Agent, and Salesforce Community Cloud would enable Chetwood to improve the efficiency of their agents, and ensure that their award winning customer service offering could be scaled without compromising service levels.

Throughout the implementation and deployment, Silver Softworks provided support to each relevant team to ensure a successful project. Our experienced team made sure reporting was possible at each stage, with reporting options possible for each product separately as well as an intertwined view for a full picture of progress.



# Products used

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## Service Cloud: Case Management

Ensuring that customer queries are addressed in a timely fashion while maintaining a full audit trail of all interactions and a full 360 degree customer view



## Live Agent: Web Chat

Real time communication between Chetwood's customers and their support team via live chat on the websites of the various brands.



## Omni-Channel: Case Routing

Route support tickets to the correct agent at the right time, based on workload/capacity, skillset, and brand familiarity.



# Products used

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## Community Cloud: Website Integration

Expose Chetwood's customer FAQs on their website via Salesforce Community Cloud. Knowledge articles updated in Salesforce are published in real time to each brand's website.



## Salesforce Knowledge: Shared Knowledge Library

Maintain a library of company knowledge and solutions, and share articles with customers to resolve their issues more quickly.



## Analytics: Reports & Dashboard

A full suite of reports and dashboards to enable reporting across each brand individually, or Chetwood Financial as a whole.





# How we continue to help Chetwood Financial

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As one of our managed services customers, Chetwood Financial continue to benefit from an ongoing collaboration with our consulting team.

With around the clock access to our certified team, Chetwood Financial are able to implement continuous improvements on their Salesforce instance and ensure the system is always up to date, as well as being able to implement new processes and products quickly to keep up with their rapidly changing business.

# What Chetwood Financial say about us...

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Silver Softworks have been an integral part of how we quickly adapt and respond to our customers' needs. From the very start of our relationship, they have been on hand to support us and provide their expertise; whether that be when training our staff or introducing us to the new features Salesforce release. With each product we build, it's important that we tailor our communication processes and workflows to support what would add value to our customers' experience.

Silver Softworks have helped us achieve this and we believe their services have helped us earn an 'Excellent' rating on Trustpilot from our customers across both LiveLend and SmartSave, with customers enjoying the fact that they can do "everything online and if you have any questions, they get back to you on live chat or email quickly and answer your questions thoroughly.

**Sean Lynskey** | Head of Operations  
*Chetwood Financial*



# Let's build something great. Together.

Please contact us for more information.

Contact the Salesforce Experts

