



CASE STUDY



NEOVEST

Neovest is a broker-neutral electronic trading platform dedicated to simplifying clients' workflows and enhancing the overall trading process. The company provides its clients with access to opportunities for global liquidity and more than 360 brokers worldwide. It offers solutions and tools for single-instrument, pairs, portfolio, and spread trading, and it provides clients with detailed trade analytics.

THE CHALLENGE

Streamlining the Support Process, Enhancing Case Threading

The primary pain point Neovest hoped to solve by implementing Salesforce was to automate its manual support workflow, which made it difficult to track individual cases. When users and prospective clients would contact the company through its support feature, the inquiry would be entered into the system. The platform, however, didn't provide Neovest representatives with any advanced features to track and update individual cases.

The inability to view a case's current status would often result in a lack of clarity in the sales and service departments, and would occasionally cause cases to stall. Neovest desired a better case-threading workflow that enabled its sales and service reps to update and view the status of each case and respond accordingly.

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THE SALTCLICK SOLUTION:

To solve Neovest's case-threading problem, SaltClick leveraged Salesforce to automate the company's lead and case workflows. Because Neovest was already using a third-party software called Aha! to track its inquiries, SaltClick integrated Salesforce with the already-existing platform. This allowed Neovest to continue using the software with necessary advanced upgrades from Salesforce.

Using Salesforce, SaltClick implemented data-integrity features that enabled sales reps to sort cases by state or country and provided tools to track and report on what email inquiries were coming in. The implementations allowed those on the sales side of Neovest to view and edit resolution rates, see the number of status changes on a particular case, and determine how long resolution took. For open cases, the new features also informed the service side of the company about whether an inquiry was awaiting a client response or required action on their end.

In addition to streamlining workflows for both sales and service reps, SaltClick's implementations enabled Neovest to add new functionalities to its platform, including an ideas portal that allows clients to submit suggestions that can later be attached to their cases.

CUSTOMER REPORTED RESULTS:

Since adopting SaltClick's Salesforce solution, Neovest has reported satisfaction with its more streamlined workflows. Both sales and service representatives are pleased with the new features, informing Neovest's primary stakeholder that the implementations have improved their overall communication and ability to manage cases.



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passion.
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SALTCLICK**

In particular, the company praised SaltClick for its own effective and helpful communication style. Neovest saw SaltClick's willingness to provide regular feedback and updates as they worked as one of the organization's strengths, especially given the need to integrate Salesforce solutions into already-existing software. The collaborative efforts on both sides made for a painless six-month process that resulted in both parties expressing happiness with the end result.



SaltClick is an award winning IT consulting organization specializing in delivering innovative cloud-based technology Salesforce® solutions to small and medium sized businesses.