

Case Study – Separating Business and Personal Life



The Customer

Drinking water products and solutions vendor

Challenge:

The service department staff used to mark the business rep cellphone number on the products, resulting in customers calling reps and sending them Whatsapp messages 24/7.

Solution:

Mobile2CRM added an auto-call-recording virtual mobile number + Whatsapp + business SMS on all service personnel mobile phones. In parallel, the virtual switchboard services were augmented to include:

- Business numbers availability schedules
- Call redirect service (on vacation, workload balancing, etc.)
- Call routing according to the products and service required

The enabled service staff to hear customer call recordings using their cellphones and to analyze customer-facing interactions. Integration with the Senzey CRM system ensured that customer data now includes all call recordings, with cellphone-based click-to-call functionality.

Outcome and benefits:

Customer communication bottlenecks were removed, along with business growth roadblocks. Customer data remains in-company with business data protection, and field staff supervision - including unusual events debriefings increased customer satisfaction.

“Field service ingenuity is a blessing, unless improvised solutions interfere with proper procedures due to a lack of clear process definition and the right technology.”

Mobile2CRM enabled growth, and helped us streamline operations and increase customer satisfaction.”

The firm's COO