

CUSTOMER **SUCCESS STORY**

CaseWare Africa blazes a trail in fintech with Salesforce Customer 360



200 employees
Salesforce Customer since 2010

For many companies, there's no asset more valuable than time. CaseWare Africa is dedicated to giving customers more time - through smart technology solutions, easy self-service, and transactions that can be completed in the smallest number of clicks.

The leading provider of auditing and financial reporting software in Africa has always been a trailblazer in its industry. As an early advocate of Salesforce Customer 360, CaseWare Africa implemented the platform in 2010 and with smarter processes and greater efficiency, it saw profits triple and revenues double.

"Salesforce helps us to seamlessly deliver products to customers and empower them with more self-service. After 10 years on the platform we can't live without it," said Jodi Joseph, Divisional Executive at CaseWare Africa.



Giving customers a seamless experience

CaseWare Africa, a division of Adapt IT, delivers solutions to financial service providers, government bodies, and blue-chip companies across Africa. CaseWare Africa serves over 20,000 users from its offices in Johannesburg, Nigeria, Kenya, Botswana, and Mauritius, and works with local partners in Zimbabwe and Zambia to ensure every customer gets the most from the solution.

"Our goal is for customers to be able to use our software anytime, anywhere, and have access to all the resources they need without having to contact the support team," explained Jodi. CaseWare Africa believes the keys to a seamless customer experience are

integrated processes and an innovative CRM platform. One of the driving forces behind its Salesforce implementation was the need to integrate CRM with its service desk from day one. The company implemented the solution using in-house expertise and gets ongoing support from its partner CloudSmiths - founded by a former CaseWare Africa employee. "We couldn't ask for a better partner - CloudSmiths really understands our business and goals and always knows how to optimise Salesforce to work for us," commented Jodi. "The team will even tell us if we have a bad idea, which is exactly the kind of trust you need to succeed."

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JODI JOSEPH | DIVISIONAL EXECUTIVE, CASEWARE AFRICA

CUSTOMER SUCCESS STORY



Building a community for success

With Salesforce, the sales team now has full visibility of the customer journey and next best actions, which speeds up order processing and customer onboarding. The team built customisations to extend Salesforce's out-of-the-box functionalities to include features such as quoting and invoicing from one dashboard. Leads are funnelled into Sales Cloud, converted into opportunities, and allocated to one of the 35-strong sales team to nurture. To give customers a more engaging interaction, the team then follows up face-to-face, by phone, or by email. When these prospects become customers, they are enrolled into what CaseWare Africa calls its 'success community' – a community built on Experience Cloud – where they can download their chosen software and get started.

"Our founder has always been forward thinking. We've had a community for around seven years and get around 5,000 unique logins a month. As business has grown it's helped us keep the volume of support calls down while making sure our customers feel well-supported," revealed Jodi. Users have access to a variety of resources for them to be successful 24/7 365 days a year. Behind the community, the service team uses Service Cloud to give customers omnichannel support. From a central login, customers can start live chats, raise cases, track their ongoing tickets, and access frequently asked questions and knowledge articles. In 2020, the knowledge base was viewed more than 87,000 times from approximately 144,600 logins.

"With rich self-serve capabilities, customers can train themselves on our solutions and solve common issues without having to reach out to the support team," said Jodi. "Of course, if they do need help, they can talk to an agent on the channel of their choice and get the same great service."



Smarter processes empower staff and customers alike

Over the ten years of the Salesforce implementation, the company has grown and fostered a culture of support and innovation. "Our team loves Salesforce. It takes away repetitive admin tasks so sales and service teams can focus on more valuable and rewarding tasks," revealed Jodi. "It helps us to work as one team from the top down."

Next on the agenda, the team is planning to launch its web shop on Salesforce to support the customer journey from end to end and increase the company's online presence and market share. "Customers will be able to go online and order products 24/7. Because our product is software, we didn't need the range of tools



Becoming more proactive with richer data insights

Centralising processes on Salesforce also lets the company capture data across the whole customer journey to improve experiences. For example, webinar topics are shaped by the most commonly-searched terms in the community to proactively educate customers on key features before anything slows them down. The company's most viewed video explains how to get started with the solution, which was a top ten topic searched for by customers. The company also uses data for continuous improvement. For example, report scorecards help track and improve productivity. "We're a very data-driven organisation, but we don't use it to police our team. If a sales rep hasn't had time to pick up an action, someone else can step in and complete it so the customer gets a seamless experience and our team feels supported," explained Jodi.

This level of visibility played a crucial role in helping the team adapt to remote working during the COVID-19 lockdowns, but it was Pardot that provided the most value to customers during the pandemic. The solution was originally used to send customers relevant communications and content at the right time – for example, initiating a welcome journey when they sign up, and triggering reminders to renew their software. But during the pandemic there were numerous regulatory changes relating to tax and other finance issues that CaseWare Africa needed to keep customers updated on.

"With data captured in Salesforce, we've identified the best time of day to communicate with different segments. Pardot gives us the flexibility to customise and automate communications to have the biggest impact – which was really important during the COVID-19 crisis," said Jodi.

"The power of Salesforce is in putting customers at the center of your business – get that right, and it opens up a whole world of innovation and data to drive real change within your business," concluded Jodi.

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