



STRATEGIES FOR APPLICATION MANAGEMENT & IMPROVING CUSTOMER SERVICE

About Our Client

A financial services company that provides financing solutions to Independent Dealers and Franchise auto-dealers across Canada.

Challenges

With over 500 employees and multiple technology platforms, information was messy making it difficult for cross-departmental teams to collaborate or have any in-depth transparency of their account or contact records. Outside sales teams had their own way(s) of tracking information, internal messages were struggling to reach people, and reporting was far too cumbersome resulting in a drain on employee's daily job duties. In addition, the company needed an efficient way to manage dealer applications.

Solutions

- CRM Implementation and Intranet Portal for Employees (3rd Party Application).
- **Enabled self-serve option** by creating a Dealer Portal in which dealers who are granted access can view the status of their applications, manage their account details, and submit inquiries.
- Implemented the Salesforce application Simpplr - a purpose-built solution to develop networks across departments for distributed teams.
- Configured Sales Cloud to establish a central source of truth for the company and provide a flexible platform to **automate application processing**, lead generation, and integration with other softwares to **optimize operations and increase efficiency**.



Results

- Encourage social collaboration to remove departmental silos.
- Improve customer service through real-time activity tracking of all engagements.
- Unified system of information that is easily searchable.
- AI recommendations for knowledge management to help solve problems quickly.
- Mobile ready.