Client

A German leasing company for bicycles and e-bikes

Solution
Salesforce, Service Cloud: Omni-channel, CTI, Case Management, Knowledge Base, Einstein Article Recommendations, Case Classification, Einstein Bots

Industry
Finance, Bicycles & E-bikes

Challenge

The client asked for a solution to provide omnichannel customer support. To integrate support with in-house software to get information about customers. Another request was to handle partner onboarding to get more property providers included inside the search database and manage partner contracts and commission rules.

Solutions

Based on the business requirements, the RA team offered Service Cloud implementation.

The aim was to meet all customer needs by using multiple channels and seamlessly connecting with support staff in real-time to provide best-in-class customer support. OMNI-CHANNEL to manage as many communication channels as the client wants was implemented. It allows to route cases to appropriate agents based on complex pre-set conditions.

Then the RA team configured COMPUTER TELEPHONY INTEGRATION (CTI) to receive customers' requests via phone and the email-to-case solution to receive requests via emails. After an email is sent a case is automatically created.

To improve customers' post-purchase experience, the RA team configured a CASE MANAGEMENT solution to let customers contact a support center and be tracked as a case. Additionally, the team provided email-to-case when an email is sent and then a case is automatically created.

To reduce costs for support services the RA team suggested implementing KNOWLEDGE BASE.

It encouraged customers to search for the required information by themselves to solve their issues and find answers to their questions by using inner articles.

The RA team implemented EINSTEIN solutions to make customer support services smarter. EINSTEIN ARTICLE RECOMMENDATIONS allow customers to speed up the search and solve the problem more efficiently. It uses data from previous cases to produce more accurate recommendations in a matter of seconds. CASE CLASSIFICATION trains the client's AI model by learning how support agents set field values on cases in the past. Then the model can recommend field values for new cases. EINSTEIN BOTS solution to free up some agents and provide customers with answers to trivial questions.

Results

- **Enhanced customer experience**

Customer experience improvement provided with different customer purchase channels.

- **Improved customer support**

The customer can track and resolve emerging issues in a fast and effective way.

- **Bosted content strategy**

Relevant content enhancement engaged prospects and converted them into customers.

- **Workload optimization**

Reduced workload and increased customer experience to scale support strategy.

"They've always tried to make our requirements better.
Routine Automation has gone above and beyond to exceed the client's expectations. The team has worked hard to pass the Salesforce security reviews and thoroughly discuss the needed requirements. They've communicated well through regular meetings. Their solutions are impressive."

MF **Marko Fliege**
Founder & CEO | *juston*