



### CLIENT PROFILE



Bento offers full-featured VISA debit cards that allow you to manage the cash you already have more efficiently and ensure that you have real time visibility.

#### INDUSTRY:

High Tech+ Banking

#### PRODUCTS:

Service Cloud

#### SERVICES:

Product Implementation



Grace Trang, Head of Business Operations and Internal Development



[www.bentoforbusiness.com](http://www.bentoforbusiness.com)

### WHAT THEY NEEDED

Bento for Business was looking to improve their Customer Service processes by leveraging key customer and sales data stored in Salesforce without needing to constantly compare data between separate systems. Bento needed to accommodate incoming support cases from several email addresses as well as web forms, and assign those cases to the correct team of representatives to ensure the highest quality of support was given to their customers. They were also looking to automate initial case responses and utilize a library of response templates when communicating with customers. Managers and Executives were looking for the ability to view reports on key metrics and performance indicators to improve team efficiency and customer experience across their sales and service teams. Bento also deals with sensitive customer information on a daily basis and wanted to be sure that their data as well as their customers data would be protected.

### HOW WE SOLVD IT

SOLVD migrated Bento’s existing customer support processes from Zendesk to Salesforce Service Cloud, integrating directly with existing Sales Cloud implementation to link customer accounts with incoming support cases. SOLVD implemented a robust set of security rules to ensure customer data was secured and only accessible to those with a direct need. SOLVD implemented auto- mations, case queues and case assignment rules to ensure cases went to the proper team, and notified the customer that their request for help had been received. SOLVD configured the Case object with custom fields and page layouts to provide key informa- tion to sales reps at a glance. SOLVD built reports and dashboards to provide valuable information and metrics to managers and executives. SOLVD met with the end-users of the system to train them to make the best of the new system, as well as gather feed- back for future changes and improvements. Bento employees are working in the system daily, and SOLVD and Bento have an ongo- ing engagement for system support, optimization and improve- ment.

