Solve It Stories

Tales of Customer Success from Our Partner:

Palladin Technologies

How Palladin helped Call Experts improve and scale its customer onboarding process.

The Challenge:

Call Experts is a 24/7 answering service and contact center solution with live agent and automated support. The company was experiencing rapid growth and lacked a consistent, scalable onboarding process. Its customer experience was fragmented, and as new customers ramped up, they were engaging with multiple departments with limited visibility into any interactions between them.

The Opportunity:

Companies often need to streamline and automate onboarding processes as they scale.

How do they ...

- Scale for growth?
- Drive transparency into the onboarding process across departments?
- Delight their customers with smooth and efficient processes?
- Identify and prioritize gaps with onboarding?

Call Experts needed a comprehensive onboarding process that would scale easily with its growth trajectory while driving NPS through a harmonious and coordinated customer experience.

> **Our experience with Palladin Technologies as our support partner for Salesforce: Sales Cloud, Service Cloud, Experience Cloud, and Marketing Cloud, has been outstanding. Their expertise, proactive approach, responsiveness, collaboration, and transparent communication make them an invaluable partner.**

Haley Cheeks
Director of Operations

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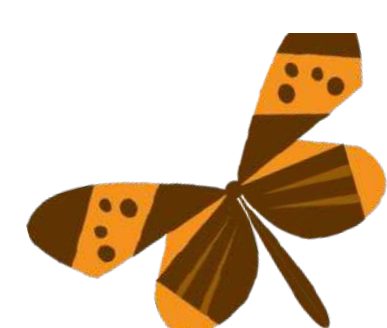
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The Successful Outcome:

Palladin Technologies implemented flows into Call Experts' Sales Cloud and Service Cloud reporting, all accomplished with clicks not code. Since launching the unified platform, Call Experts has streamlined its processes and achieved a new level of transparency, allowing teams to collaborate with maximum efficiency and resulting in faster onboarding. Palladin Technologies has provided departments with visibility and accountability, enabling each team to take ownership of its processes, measure the onboarding timeline, and ensure departments are meeting the company standard. Call Experts now has a full visual of the end-to-end process and can identify areas for future enhancements within Sales Cloud, Service Cloud, Marketing Cloud, and Experience Cloud.

This has resulted in:

Better customer experiences

Reduced operational expenses

A more efficient onboarding process

Considerations for support centers wanting to get more out of Salesforce

- Prioritizing clicks, not code – it simplifies implementation and empowers non-technical users to help create solutions

- Providing a seamless onboarding customer experience is a critical phase in building a lasting relationship

- When implementing Salesforce, or enabling a new business process, create a clear plan to manage changes and promote user adoption

- Utilizing a Managed Services Partner with domain experience helps you adjust your Salesforce needs as your business evolves

Learn more about Palladin Technologies on AppExchange.

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