NDA
Financial Services

Technologies

OSP · Service Cloud · Einstein features · Amazon Connect · Data Mask

Workforce Engagement · Experience Cloud · Consent Management

The top-performing call center services company that specializes in onshore omni-channel solutions, accounts receivable management, and back-office functions for public and private entities.

Set up a contact center for each client and store data separately. The CRM console should allow agents to simultaneously work on multiple contact sessions, which may originate from different channels, without having to manually switch channels.

⚡ Challenge / Problems

The company had not used Salesforce before, so it was necessary to create an interface that would help employees get to work as quickly as possible, reducing time for long onboarding and training.

⚙ Solution

Propeller Plan set up Service Cloud with Email-to-Case, Chat, SMS, Service Cloud Voice/Amazon Connect channels, implemented Omni-channel routing. Configured the Einstein Bots for Chat & SMS channels. Installed a free application that can be used to comply with data protection and privacy regulations.

⊘ Results

Omni-channel feature has been set up to automatically distribute incoming work depending on agents' workload and the skills required to solve a specific task in order to reduce time compared to assigning tasks manually. With the help of Bots, chat/message duration has been reduced, helping customers to send messages immediately. Customer satisfaction has increased since they can solve typical problems on their own, without waiting to "get in queue." Reduced agent time spent on common problems (and therefore saved the company money), allowing agents to spend more time solving complex problems and consistently interacting with customers.

Created an Experience Cloud site and configured visibility for various external roles (manager and end-user), reducing company costs by eliminating the need to purchase Salesforce user licenses for each partner.

Propeller Plan