

Leading Regional Financial Services Company

Call Center Salesforce.com Implementation

Business Challenge

The Retail Banking Division of this leading Regional Financial Services Company (“the Bank”) had an aggressive program to sell a greater number of products and services through its branch network. The management team had chosen to roll out Salesforce.com across the Retail bank to support a number of capabilities from sales force automation to call center management. Since this was the Bank’s first implementation and they had committed to over 1,500 seats/licenses, the company chose to pilot the application within their Tier 2 and Tier 3 call center support function. The Tier 2-3 support team fielded calls that required additional research and the team used a custom MS Access database to track calls and resolutions.

The Bank selected Acumen Solutions as its strategic Customer Relationship Management (CRM) implementation and integration team. The core objectives of the effort were to:

- Retire the inflexible and unstable MS-Access database used for case management
- Leverage the “Service & Support” modules in Salesforce.com to enable
 - core case management capabilities
- Roll-out Tier 2 and Tier 3 Contact Center Functionality to 300 users
- Integrate Salesforce.com with the Bank’s Customer Master File which
- posed a number of technical challenges:
 - The need to perform an initial load of over 7 million base records
 - The need to support restart and recovery of the batch process if interruptions occur on the API based integration platform
 - The need to handle several scenarios of customer information ranging from additions, deletions, changes and merges

Automation and better coordination within the Contact Center has reduced average Call Times and Open Case Volumes, and has enabled management to meet their service level agreements.

The Solution

First, Acumen Solutions developed a ten week implementation plan to establish the key business rules and to perform the key Salesforce.com customization for all the specific call center functionality that was needed. The team scheduled a series of business process review sessions with various stakeholders from both the Contact Center and from the Bank’s Information Technology group to: define the workflow, to establish user roles and access levels, and to identify critical customization of fields, page layouts, and data. As the team identified hierarchies within the contact

center roles, they worked to develop a customized set of page layouts, field accessibility, and reports to support users from the executive level management all the way down to the contact center representatives themselves. Ultimately, the Acumen Solutions configured the following standard modules within Salesforce.com including the Account, Contact, Asset, and the Case modules. Other custom modules were created for other Bank management needs including Service Level Agreements (SLAs) and Branches. Acumen Solutions was also responsible for building several custom S-control solutions which calculated custom Due Date functionality including both Bank Holidays and the Contact Center's working hours for automatic Due Date assignment of all cases.

Second, as the team made strides developing the workflow, Acumen Solutions also began to design a method for extracting key customer data needed in order for the contact center to operate (including customer, customer account and customer contact information) from the Bank's Customer Master file (on the mainframe). The team assessed several vendor packages to perform the Extract Transform Load (ETL) process. The team opted for a package made by Pervasive using its Business Integrator technology to perform the ETL process. The team created an Oracle staging database, where the master file was staged from flat files that were extracted from Customer Information System (CIS) on a nightly basis. This information was then mapped and loaded into Salesforce.com using the Business Integrator. As data mappings were built from the staging database to Salesforce.com, it became evident that the combination of the Bank's environment and the https protocol used to invoke the Salesforce.com service were fairly unreliable when dealing with the volume of data during the initial load. As a result, the team had to adjust the integration design in order to support the restart and recovery capabilities needed in order to manage this. The team accomplished this by parsing the record size of each data set into manageable chunks in order to minimize the need for the automated restarts, due to network limitations.

Technical/Business Expertise

Acumen Solutions was able to help and support the Bank's delivery of the new Contact Center Case Management System with its expertise and knowledge in the following areas:

- Business Process Definition
- Salesforce.com Customization and Administration
- Custom S-Control Development
- Data Integration
- Systems Integration Design
- Oracle Database Design
- Pervasive (Business Integrator)

Return on Investment

The Bank deployed Salesforce.com in a phased approach to over 300 Contact Center users. The new Case Management functionality provides tighter coordination and communication across organizations (including executives) for better overall customer support. The CIS integration allowed for key Customer information to be fed into Salesforce.com on a nightly basis which greatly improved the quality of the existing Case Management database that was being utilized by the Contact Center. Some key benefits that the Bank realized from this deployment included:

- Tighter coordination between Tier 2 and Tier 3 Support and the Bank Branch Operations
- Improved Customer Service due to up-to-date customer information provided to the Call Center Reps
- Automation and better coordination within the Contact Center has reduced average Call Times, Open Case Volumes and has enabled management to meet their service level agreements with their customers
- Senior Management has a central repository to facilitate management and decision making for the Call Center