

# CASE STUDY

**Build an Engaged and Efficient Customer  
Portal with Salesforce Community Cloud**

**softserve**

**Empower customers with self-service, improve support communication, and increase customer service scalability.**

**A**n inefficient client portal was wreaking havoc on our client's ability to provide effective requested services.

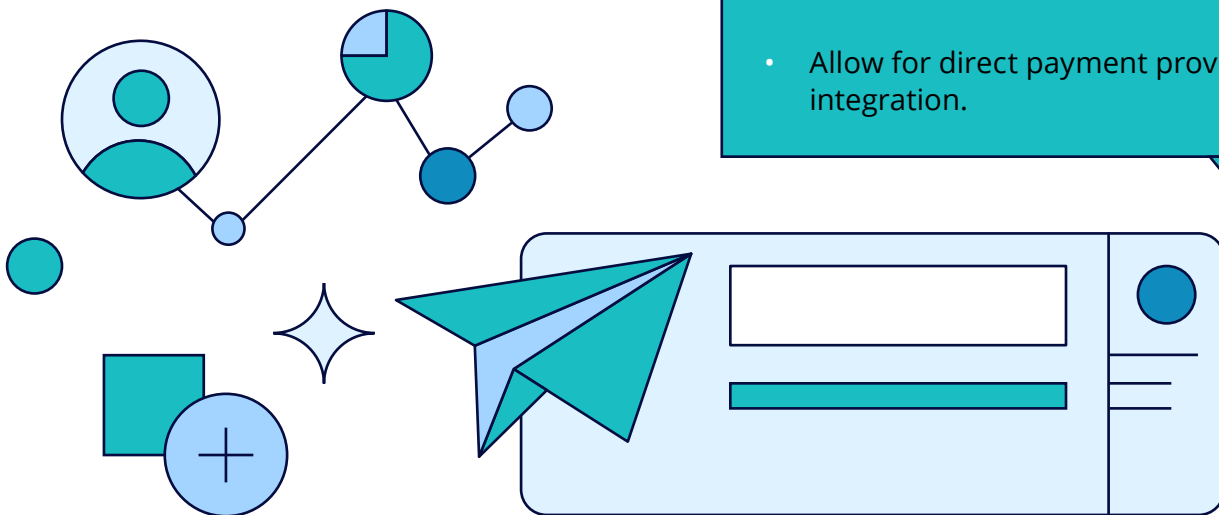
This US-based financial services tech company provides brokerage, investment banking, and advisement. It was held back by a customer support system that couldn't scale properly or build a single view of the customer. The portal was challenging to maintain, much less develop or integrate with other components.

With overall business performance struggling because of the customer portal's inability to expand or integrate with Salesforce, the client came to SoftServe for a solution.

SoftServe's experts recognized the immediate need to reduce severe performance issues and fix the existing portal's inability to scale.

Our team replaced the current system with Salesforce Community Cloud, knowing the platform would:

- Establish convenient communication between customers and support, creating a win-win experience for both.
- Enable customer self-service using traditional forms of customer service communication while still providing a seamless switch to live agents when needed.
- Create an easy place for users to submit issues and track their resolution.
- Allow for direct payment provider integration.



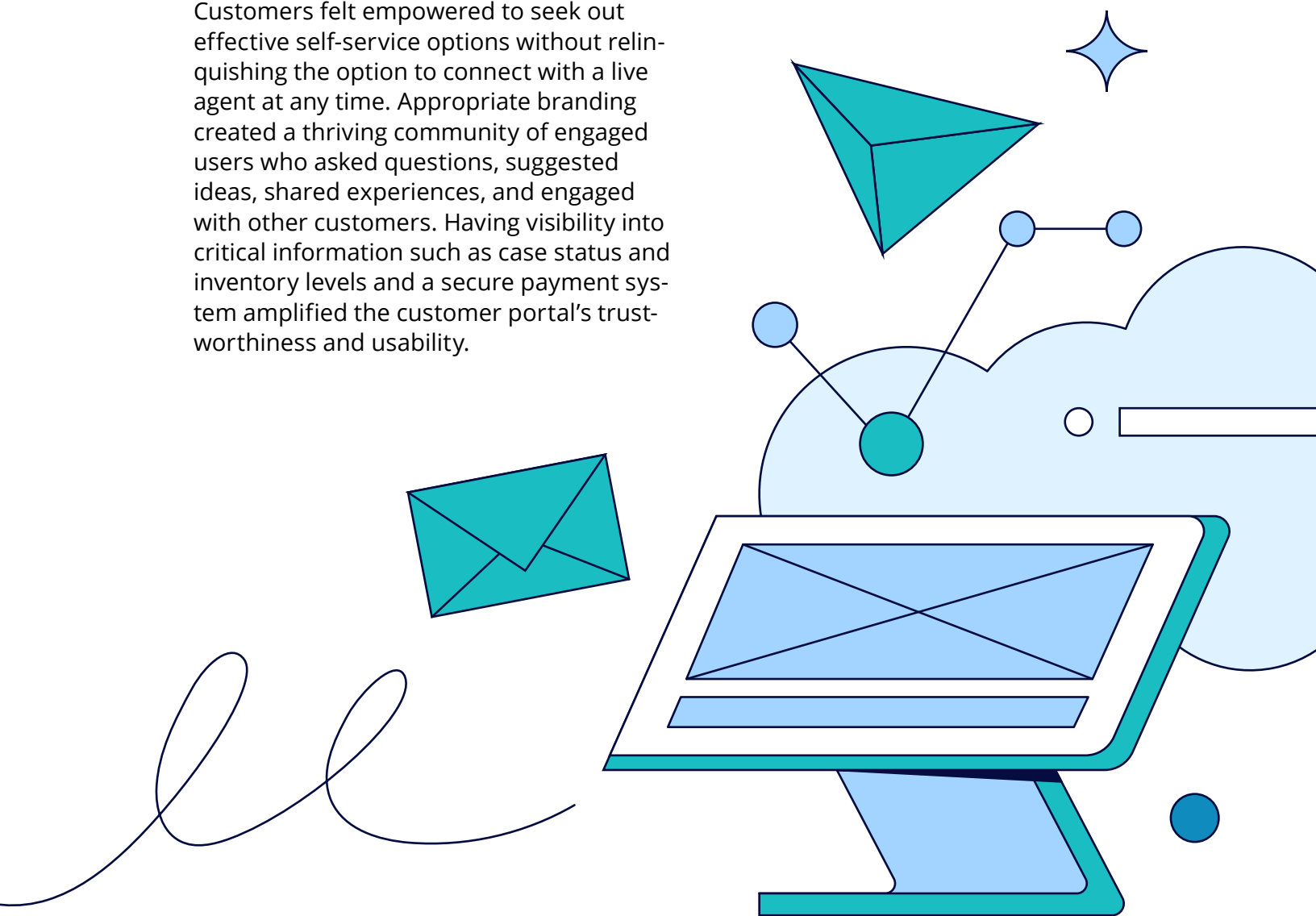
SoftServe overhauled our client's customer portal and moved them to the Salesforce Community Cloud. This move afforded our client access to all of Salesforce's functionalities, in addition to improving their customer service system.

These changes significantly decreased the stressful load of cases for support agents while also increasing the case resolution ratio.

Customers felt empowered to seek out effective self-service options without relinquishing the option to connect with a live agent at any time. Appropriate branding created a thriving community of engaged users who asked questions, suggested ideas, shared experiences, and engaged with other customers. Having visibility into critical information such as case status and inventory levels and a secure payment system amplified the customer portal's trustworthiness and usability.

For our client, implementing Salesforce Community Cloud and integrating the Salesforce Platform ensured a successful path towards business growth and scalability.

**LET'S TALK** about how SoftServe can transform your customer service, client portal, and ultimately your business outcomes with Salesforce Community Cloud.



## ABOUT US

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, energy, financial services, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation, from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy. No matter where you are in your journey.

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