

# CASE STUDY

**Improve Customer Support by  
Optimizing Salesforce Service Cloud**

**softserve**

**Streamline functionalities, simplify systems, maximize resolution impact, and drive exceptional customer support.**

You're leaving money on the table and losing out on increased business success if you're not fully utilizing Salesforce's functionalities.

Though our client—a US-based financial services tech company providing brokerage, investment banking, and advisement—saw benefits from the Salesforce Platform, they were still missing out on critical Service Cloud optimizations.

One major issue was that their Service Cloud CTI integration was used solely as a call center. It led to fragmented information between various support communication channels.

Creating meaningful resolutions for customers was also hindered by a lack of crucial analytics. The support team could not fully understand issues at the individual or company level.

**Facing these compounding problems, this client came to SoftServe to redesign and implement enhancements to their current Service Cloud.**

Our team of experts quickly ascertained that an automated workflow and a properly configured and customized Salesforce Platform could provide the client with:

- Intelligent case routing with omnichannel communication to all involved parties.
- Customized case escalations, allowing customer support to manage cases quickly and efficiently.
- A centralized Service Cloud console that provides analytics so support could work from a single screen.
- Streamlined end-to-end case management, from creation and prioritization to assignment, escalation, reassignment, and closure.



Our client saw a clear and immediate improvement in customer support functionality as soon as the SoftServe team of experts redesigned and implemented the Service Cloud enhancements.

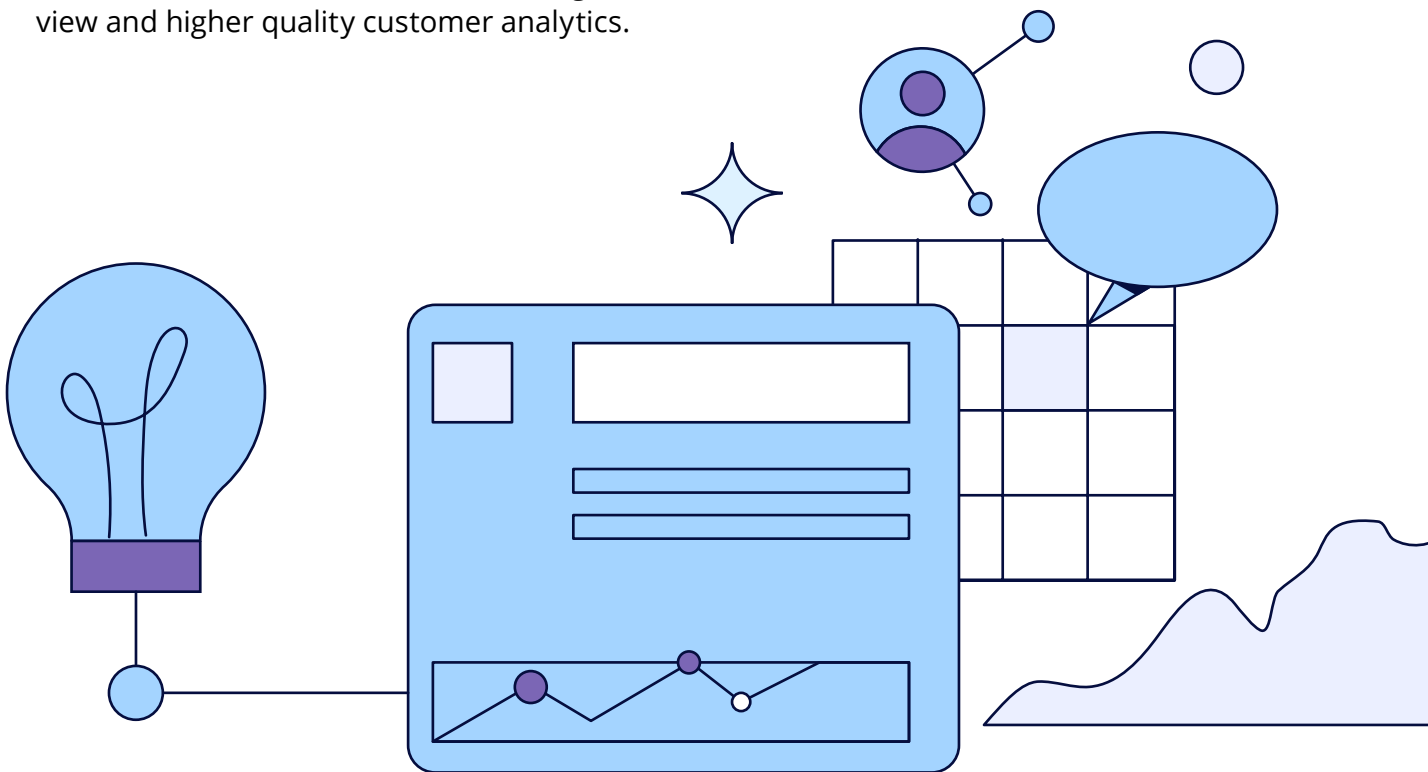
Creating a seamless omnichannel user experience across desktop, tablet, and mobile meant customers and support staff could better understand and resolve issues.

Integrating an automated and well-structured customer service system decreased the amount of manual work required. It freed the support team to focus on other service needs. The Service Cloud console enhanced this new focus with a 360-degree view and higher quality customer analytics.

Finally, the flexible mechanisms for case capturing—whether from a customer’s website, email, or directly in the Salesforce Platform—increased the speed of identifying issues and finding resolutions.

An overhaul of the client’s Service Cloud to take full advantage of Salesforce functionalities and enhancements delivered a transformative customer support solution.

**LET’S TALK** about how SoftServe can maximize the effectiveness of your customer support using Salesforce.



## 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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