

# CASE STUDY

## REFERRAL SERVICE SOLUTION DRIVES POSITIVE CUSTOMER EXPERIENCES FOR SMARTHOME TECHNOLOGY PROVIDER

### Client Background

Our client is a leading smart home technology provider. It offers home security, energy management, home automation, local cloud storage, and high-speed Internet solutions to more than one million customers throughout the United States and Canada.

### Business Challenge

Our client was looking to capitalize on the thousands of positive customer experiences it facilitates on a daily basis through its Customer Care and National Inside Sales (NIS) teams by allowing agents to provide a referral offer at the end

of calls with satisfied customers. This referral program will provide an opportunity to existing customers to receive a benefit by if the friends they refer become new customers.

### The program will encourage:

- agents to promote the Referral Program and offer it to existing customers
- customers to share referral codes with friends
- Referred friends to become customers and redeem the code

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## Project Description

During a 4-week discovery phase, current business processes were analysed and a vision of the future state was designed. Priorities for implementation were aligned. The proposed referral service solution will consist of a referral code creation module and referral offers management module.

The referral code creation module will provide agents with the ability to generate referral codes and share it with a referring customer, who, in turn, can share it with a referred friend. The referral offers management module will provide managers with ability to create and manage referral offers (a basis for referral codes) and view analytics for each referral offer. Both modules will be web based.

**Based on business needs, the value of end-users, and technical implementation efforts, a solution scope was proposed to be implemented within the following releases:**

- Release 1 (MVP) – Core functionality for agents to create a referral code and send it to customers. This features the capability to create referral offers via API/DB and the ability of a referred friend to redeem the code.

- Release 2 – Core functionality for admins to create and manage referral offers. This features reporting and analytics for admins, bulk sending of codes, and the ability to share referral codes via social networks.
- Release 3 and beyond – advanced functionality for all user roles.

## Value Delivered

SoftServe successfully delivered a tool that enables our client's customer care team to sell to happy customers. The estimated monetary valuation from the boost in customer satisfaction is around \$22M per year. This new tool has already resulted in 43 new sales for our client within the first few weeks of use.

## 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, media, financial services, software, 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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