

Salesforce Community Cloud Set-Up for An American Multinational Personal Finance Company

HIGHLIGHTS



Salesforce Community
Cloud Set-up from Scratch



Two-Way Case Deflection
Process Implementation



AI-based Chat
Deployment



10% Higher Case
Deflections

THE CUSTOMER

The customer is a personal finance company based out of San Francisco, CA, and is best known as a credit and finance management platform. Apart from free credit scores and reports, the customer also provides other financial services like tax filing, loans, etc. With its operations spread across countries like Canada and the United Kingdom, the customer enjoys a vast customer-base globally.

THE CONTEXT

The customer was using Zendesk for its CRM and support operations. Their support operations were largely centered around their online community, which was also on Zendesk. 80-85% of their customers used to visit their community for any help or creating a case. There were many existing customizations within their Zendesk system and they also wanted to enable other next-gen features like an AI-enabled chat, phone log system, case deflection, etc. But Zendesk does not offer customizations at scale. Also, the customer was looking for a securer CRM option.

THE OBJECTIVE

The customer decided to move to Salesforce. They wanted to set up their Salesforce Org from scratch. Their community also needed to be set up from scratch on Salesforce. They wanted a knowledge-rich online community with an effective process for case logging, case management, and AI chat. Since most of their customers were mobile users, the customer wanted a mobile responsive community and also wanted an effective mechanism to improve their case deflection.

THE SOLUTION

To set up their community in Salesforce, we first needed to understand their existing community processes and workflows. After analyzing and understanding their existing community workflows, we started with the process of setting up their community in Salesforce.

Phase 1

In the first phase, we created different community pages including the home page, article pages, and pages for the case creation process. We manually created user profiles and defined a role-based hierarchy for accessing community data. We used the same UI/UX that was on their existing community so that the users wouldn't face any challenges.

Phase 2

In this phase, we set up the processes and workflows in their Salesforce-powered community. We created different categories and redirected each category with the related articles. The customer's daily case volume was between 1000 and 1500 and it went up during the tax filing days. So, they relied heavily on articles for case deflection, which is why they wanted a two-way article deflection process in place while a user created a case.

We created a two-way case deflection process on the case creation page. On the first page of case creation, when a user selects a category and problem, a list of the related articles and recommended actions appear on the screen. If a user still decides to create a case, they are redirected to a new page. On this page too, based on the subject text of the case, a list of related articles again appears on the screen.

Since their community was a guest community, users were not required to log in to create a case. We added a captcha for guest users as a preventive measure against spam attacks. We also deployed Salesforce's Chat functionality in the community but it was exclusive for registered users logged in through the App. So, we also defined the chat initiation process and how it is assigned to the agents.

Phase 3

In this phase, we did some customizations for the case management process at the backend including case assignment rules. We deployed omni-channel for case routing and Salesforce security model for limiting the access to community data to users. We also developed custom dashboards for reporting and Keyword-based reporting for managers.

Once everything was set up, our quality engineers did a stringent QA and after receiving their 'good-to-go', the new Salesforce-based community was made live.

THE OUTCOME

The customer's Lightning community was successfully set up overcoming all the challenges that were overpowered with customizations. Once their community was live, the new chat functionality and two-way case deflection process came in handy and reduced up to 10% of their daily cases volume.

