



Sales Cloud and Service Cloud

The challenge

Different systems were handling customer communication from different channels, increasing advisor training requirements, making it difficult to get a 360 view of the customer, increasing training times for new advisors and making it a challenge to give consistent omnichannel experience to the customer.

Advisors were unable to gain a single-view of customers and spent time searching for parcel information in multiple systems.

Advisors were always presented the next available case through an automated 'case pop', making it difficult for advisors to develop familiarity with specific customers or to deploy a specific skillset.

The solution

makepositive carried out a health-check on GeoPost's existing Service Cloud implementation to identify areas where low-impact changes could bring immediate high-value results.

makepositive scoped additional requirements and agreed a roadmap on how the requirements were going to be addressed.

GeoPost's parcel delivery management system UniVerse was integrated to give advisors a single view of the customers' deliveries and case history within the Service Console, increasing advisor productivity.

Telephony system NewVoiceMedia was integrated to facilitate intelligent call routing and case popping to ensure that customers are put through to the right advisor quickly.

The results

Advisors are able to service customers more efficiently by seeing all relevant information within the Service Cloud console. Parcels details are available automatically, reducing search times, and customer case history is also visible, helping advisors to proactively resolve other outstanding cases when a customer calls in.

Intelligent call routing through integration with NewVoiceMedia ensures that customers are being put through to the right advisor quickly.

Cost-to-serve information is now available per customer, thanks to integrating multiple case channels and tracking all advisor activities within Salesforce.

GeoPost can now identify customers who repeatedly raise cases and provide them with training to serve themselves.

