



Case Study

Government Agency Partners with eLoyalty to Launch CRM System in 90 Days and Accelerate Public Services

Pain Points:

"I need to update my IT systems to keep up with customer interaction volumes."

Industry:

Government and Healthcare

Solutions and Products:

eLoyalty System Integration and Best Practices

Delivered a fully
integrated CRM
solution in less than
90 days

Challenge

When a government-supported agency ended its relationship with its business process outsourcing (BPO) provider, the organization was left with an outdated and proprietary customer relationship management (CRM) system that no longer met their needs. On average, the agency's contact center handles inquiries from the public on more than 750 healthcare-related topics and is required to instantly expand their operations to accommodate large influxes in inquiries during emergency situations and natural disasters. But, their customer service and CRM technologies weren't agile. Nor did they enable the agency to serve the public through a variety of service channels—phone, e-mail, and mail. Plus, the system lacked the tracking, integration, and reporting capabilities managers needed to gain a comprehensive view of the public's concerns, the service organization, and its performance. Agency leaders recognized that they needed to either make significant investments to upgrade their existing technologies, or abandon their old system and switch to a superior solution. Most importantly, the agency needed a seamless transition, and they needed it implemented in just 90 days.

Solution

The government agency partnered with TeleTech Government Solutions and eLoyalty's CRM system integrators because they had the technologies and the resources to deliver an integrated solution quickly. Due to the proprietary nature of the agency's existing on-premise CRM system, eLoyalty was not able to enhance their existing technologies to perform all the capabilities the agency needed. So, eLoyalty's technology engineers agreed to build a new system from scratch that would serve more than 85 employees and provide instant scalability. After the system requirements were complete, eLoyalty had less than 60 days to design and deploy the solution.

To meet the aggressive deadline, eLoyalty immediately turned to Salesforce.com[®]'s Service Cloud CRM technology to help the team deliver on all the data collection and transaction management requirements. Once complete, the fully integrated CRM desktop application was able to simplify

A single source for public inquiry information created clear and accurate visibility into health information

service, work in tandem with the agency's other service technologies, and generate comprehensive reports for better visibility and performance evaluation. The following is a summary of the integrated CRM system capabilities:

A Single View of the Public's Inquiries and Services

- Simplified service: A customizable user interface allowed service employees and authorized personnel to securely access and manage comprehensive customer information in one system.
- Integrated e-mail and mail inquiries with the CRM system: The solution enabled seamless service for both e-mail and mail communication channels. Integration was used to track service from initial inquiry to completion in order to trace touch points, work cycle times, and more.
- Linked the CRM system with the knowledge base: Integration was used to connect forms, support fulfillment, track issues, and enable reporting and information distribution.
- Worked with the agency's telephony technology: Integration between the CRM and Avaya technologies enabled the system to automatically populate customer data in custom records, which could then be easily updated by the service employee.
- Created a single source for all customer information: CRM integration allowed all service records, scanned documents, and transcripts to be stored as part of the customer's CRM record, making it easy to find and evaluate a comprehensive history of each customer's activity.
- Met federal government FISMA security standards: Encryption capabilities secured all personal identifiable information and enabled compliance with government regulations.

Deeper Understanding of the Public's Needs and the Agency's Service

- Collected and evaluated customer data: The system tracked the different types of inquiries it received and also collected geographic information in order to recognize trends and gain additional information from anonymous inquiries.
- Tracked the reasons behind each inquiry: The system tracked the articles used to answer each inquiry and used these articles to determine the primary reason each person contacted the agency.
- Tracked escalations: Issues requiring further investigation were tracked through every step as they moved across various departments.

Superior Customer Experiences

- Enabled quality assurance: Service calls and e-mail transcripts were recorded for end-to-end quality assurance and customer satisfaction evaluation.
- Reported the status of inquiries: To support research on the inquiry trends, the system provided robust and on-demand reporting on all service cases.

The intuitive CRM technology, as well as its sophisticated application programming interface (API) integration capabilities, allowed eLoyalty to create a smooth transition from the agency's old CRM system to the new fully integrated Salesforce.com solution. The agency was able to switch directly to the new system without losing data and without any interruption to the agency's normal public services—even the service response times were unaffected.

Employee training was also quick and easy. Multiple custom web forms and more than 25 database tables (used for managing information unique to the agency) simplified information collection, while easy-to-use reporting and escalation processes made training straightforward. Salesforce.com's Email-to-Case feature also helped jumpstart the public services work under the new solution. This on-demand feature automatically creates a service case in Salesforce.com when a request for information is received via e-mail.

Results

The government agency received a solution within the 90-day timeframe, and it also recognized significant scalability benefits from the tightly integrated technology. While the previous on-premise

CONTACT TELETECH:

solutions@teletech.com

1.800.TELETECH or

+1.303.397.8100 (outside the U.S.)

www.teletech.com

Within
48 hours,
the agency added
25 service
employees

technology infrastructure made it difficult to quickly expand the number of service employees during high-volume periods, the new cloud technology solution enabled cost-effective agility. Plus, the system's easy-to-use dashboard and simple modification features accelerated training during these critical times, making ramp-up faster and more seamless.

The added scalability came just in time. Less than one month after the technology was implemented, the agency experienced a public health crisis that inundated them with questions, e-mails, and calls from the public. Within two business days, the agency leveraged the technology to add 25 service employees to answer questions and disseminate facts to the public. Under the previous system, this expansion would have taken roughly two to four weeks. Now, the agency had a proven process that took just 48 hours.

The faster process reduced costs, too. Previously, the agency had to pre-purchase the software licenses it needed to function at full capacity and then let them sit idle until needed. But today, that money isn't wasted because the agency can instantly activate and deactivate licenses.

Now, agency managers use the multi-layered reporting technology to both create a clearer picture of the public's information requests and also to keep their finger on the pulse of the nation's healthcare needs. With the historical service data and customer information aggregated from across all communication channels and managed in one, instantly accessible location, the agency maintains more accurate health and safety records and can quickly build a variety of reports on the fly. As a result, business leaders have greater visibility into critical surge reports and trends. Additionally, the API integration tools enable mass data extraction for customized reports, providing strategic insights that help the agency better plan programs and staff resources in more cost-efficient ways.

Summary

In just 90 days, the eLoyalty integrated Salesforce.com CRM solution provided versatility in multiple communication channels and empowered a major government agency to respond to the public faster and more effectively. Today, the government better manages and tracks its public services. Best of all, the solution was flawlessly introduced to the organization without disrupting normal business operations and continues to help the agency cost-efficiently serve the nation during the greatest times of need.

Detailed Solution Information

This eLoyalty integrated CRM solution was built using the following technologies and capabilities: Salesforce.com, Salesforce Service Cloud®, eLoyalty system integration, and Best Practices.

Salesforce Service Cloud is the world's leading cloud-computing CRM for customer service and support. The Service Cloud enables companies to build great customer connections by delivering outstanding and consistent service at every point of the customer interaction – on the phone, over the Internet and across social media. With a tightly integrated Service Cloud solution you can significantly improve productivity in the contact center and deliver enhanced customer experiences and drive brand loyalty. For more integrated Salesforce solution case studies, white papers and online demonstrations, please contact eLoyalty's Customer Technology Services system integration team directly at CTS-SI@teletech.com.

Salesforce.com and Service Cloud are trademarks of salesforce.com, inc. and are used here with permission.