



Salesforce

# Elevating CX with Salesforce

How the CRM platform can transform your  
internal- and external-facing processes



Welcome to the 2020s, where nearly every market is oversaturated, and the ones that aren't are starting to feel the rain drops. To gain a competitive edge, you have to either offer something new or something timeless.



Good customer experience (CX), that age-old concept, will always put you ahead of the pack. Not only is it one of the most important brand differentiators in your toolbox, but it's also getting easier to deliver through a tailored Salesforce experience, customized to a business's target audience.

As the world's leading customer relationship management (CRM) platform, Salesforce provides the building blocks for an elevated customer experience by helping brands:



Cultivate stronger customer relationships.



Ensure a unified brand voice and consistent omni-channel experiences.



Streamline business processes and leverage data-driven insights to make informed decisions.



Improve internal efficiency and performance.

To truly maximize the potential of Salesforce and tailor it to the unique needs of your organization, customization is key. A well-designed Salesforce solution should align with an organization's business objectives, address the specific needs of the organization's target users, and integrate seamlessly with existing systems.

## Why CX Matters: Improving Customer-Facing and Internal Systems




Customer experience is the perception customers form of a brand based on their interactions with it. These interactions typically occur with customer-facing products and services.

Good external customer-facing experiences:

- ✔ Make it easy for customers to have positive interactions with your brand.
- ✔ Make customers feel valued, heard, and supported.
- ✔ Meet or exceed expectations at every step of the customer journey.

The more positive the experience customers have with your brand, the more likely it is that they will uphold a favorable opinion of your company, show leniency toward any errors, and choose to buy your products or services (or, if you're a government agency, voluntarily comply with your directives).

But a customer experience is only as good as its internal-facing systems. Good internal-facing systems are built on seamless and efficient processes and procedures that:

-  Automate tasks to expedite workflow and remove repetitive tasks from employee workloads.
-  Prioritize tasks to let employees focus on the most important items for improving customer service.
-  Provide comprehensive information about an employee's work domain to enable them to make the best decisions for the organization.

Good internal systems lead to more productive employees who are more likely to achieve their goals and maintain higher job satisfaction and engagement. And when employees are happy, customers are happy. A recent study by [Harvard Business Review](#) comparing Glassdoor employee reviews with ratings from the American Customer Satisfaction Index found a compelling link between a happy workforce and higher customer satisfaction.

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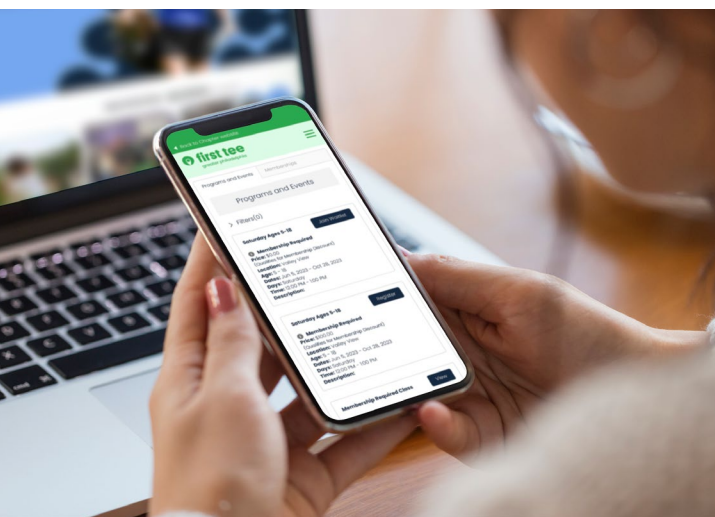
## How Salesforce Elevates External CX

Salesforce's capabilities across customer relations management, marketing automation, process building, and advanced analytics provide a strong baseline that, when combined with guidance from CX specialists, can enable brands to develop a 360-degree view of their customers and create seamless, unified experiences tailored to unique customer profiles.



By leveraging Salesforce capabilities in conjunction with CX best practices, thoughtful and research-based design, and seamless usability, brands can modernize outdated customer experiences to meet customers' ever-growing expectations.

CapTech used Salesforce to do precisely that when First Tee, a youth development organization that uses golf to build character, needed assistance with its registration system. Prior to the project, the system – relied on by users across 150+ chapters worldwide – was not optimal, especially on mobile devices. To enhance the registration experience for all users, CapTech implemented Salesforce Experience Cloud – a next-generation portal that enables companies to connect customers, partners, and employees with each other in real-time.



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Collaborating with First Tee, CapTech's team of Salesforce experts and CX practitioners designed a registration experience that let chapters customize features to meet their unique needs, supported desktop and mobile registration reliably, enabled a payment processing API to smooth online transactions, added language support for multiple regions, and featured an error monitoring capability that alerted support staff of registration issues without waiting for complaint reports.

The new system, which was tailored for First Tee using CX best practices, is significantly easier to use, requires less time to complete registration, sees fewer support calls, and boasts greater system stability.

## How Salesforce Elevates Internal-Facing Systems

To provide customers with intuitive, seamless, and delightful external experiences, internal experiences must be just as intuitive, seamless, and, if we dare to dream, delightful. Internal experiences should be customized to user needs, and put actionable, connected data at associates' fingertips, right when they need it.

Salesforce customization allows businesses to elevate their internal systems, which in turn, elevates the external experience.

A customized Salesforce solution can:

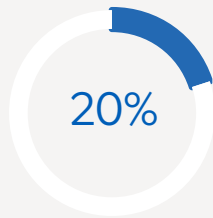
- ✔ Streamline workflows by reducing manual tasks and minimizing data entry errors, which leads to increased efficiency.
- ✔ Enhance the user interface by tailoring Salesforce's UI/UX to address employees' needs and preferences, which boosts user adoption, reduces training time, and improves overall job satisfaction and productivity.
- ✔ Personalize dashboards and reports to provide employees with real-time insights into key performance indicators and metrics relevant to their roles, which empowers data-driven decision-making and goal tracking.

Aware that the key to deepening its customer relationships was optimizing its internal systems, a Forbes Global 2000 commercial bank asked CapTech to improve its system integrations so bankers could collect information and surface real-time recommendations with maximum efficiency.

Through Financial Services Cloud, Salesforce's powerful asset management software, bankers across lines of business were able to quickly and easily gain a comprehensive view of the customer. Along with UI enhancements and back-office integrations, this new capability facilitated real-time recommendations, which increased business banking enrollment by 20%.

### UI enhancements and back-office integrations

Increased business banking enrollment by 20%.



CapTech also collaborated with the commercial bank to build a foundational omni-channel framework in Salesforce that increased user adoption, and built a custom DevOps pipeline across three applications (TFS, Jenkins, Salesforce DX) that:



Saved nearly \$50K a year in third-party investments.



Cut testing time in half.



Significantly reduced bugs in production.



Saved 30 hours of development and deployment effort per sprint.

## How Salesforce Elevates Internal and External Systems

When a Fortune 10 biopharmaceutical logistics company needed to streamline complex decision making, reduce errors, and improve customer experience, CapTech leveraged Salesforce to design a solution. Outdated internal systems were negatively impacting the company's customer-facing experiences, and vice versa, and issues such as misaligned information, reliance on tribal knowledge, excessive onboarding time, and redundant logistics systems were posing major obstacles to success. CapTech's use of Salesforce Knowledge Management enabled improved cooperation, communication, and collaboration, which enhanced the client's knowledge base and ensured everyone had access to the right information.

CapTech collaborated with the biopharmaceutical logistics company to design and build a globally scalable hierarchy and governance structure for knowledge content creation, approvals, and maintenance. The effort included recommendations for error trapping improvement, such as built-in flows and calculators for real-time customer assistance.

These articles were surfaced contextually in customer service flows to provide agents with the right support at the right time.

71%

Faster navigation to finding answers

66%

Reduction in systems to find information

Following these improvements, the company saw a 66% reduction in the number of systems used to find information and 71% faster navigation to finding answers, elevating both internal and customer-facing experiences.



# Elevate Your CX

Your brand's customer experience lives or dies by the quality of the processes underpinning it.

Working with an experienced design and technology partner can help you push beyond Salesforce's out-of-the-box functionality to maximize your investment. By tailoring Salesforce to precisely align with your unique business processes, strategies, and users, you can harness its full capabilities to enhance systems across your entire company, and elevate the experience for all of your customers.



## Customization is Key

One of Salesforce's major calling cards is its robust customization capabilities. Customized design offers many benefits, including:



**Improved User Adoption:** A more intuitive and user-friendly interface leads to higher adoption rates and a shorter learning curve.



**Enhanced Data Quality:** Customized data validation rules and automation reduces data entry errors and increases data accuracy.



**Integration Capabilities:** Seamless integration with other software and systems streamlines data exchange between Salesforce and other tools.



**Scalability:** As business evolves, custom features can be added or modified to accommodate new requirements, ensuring Salesforce remains a valuable asset over time.

Let's do next together.

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