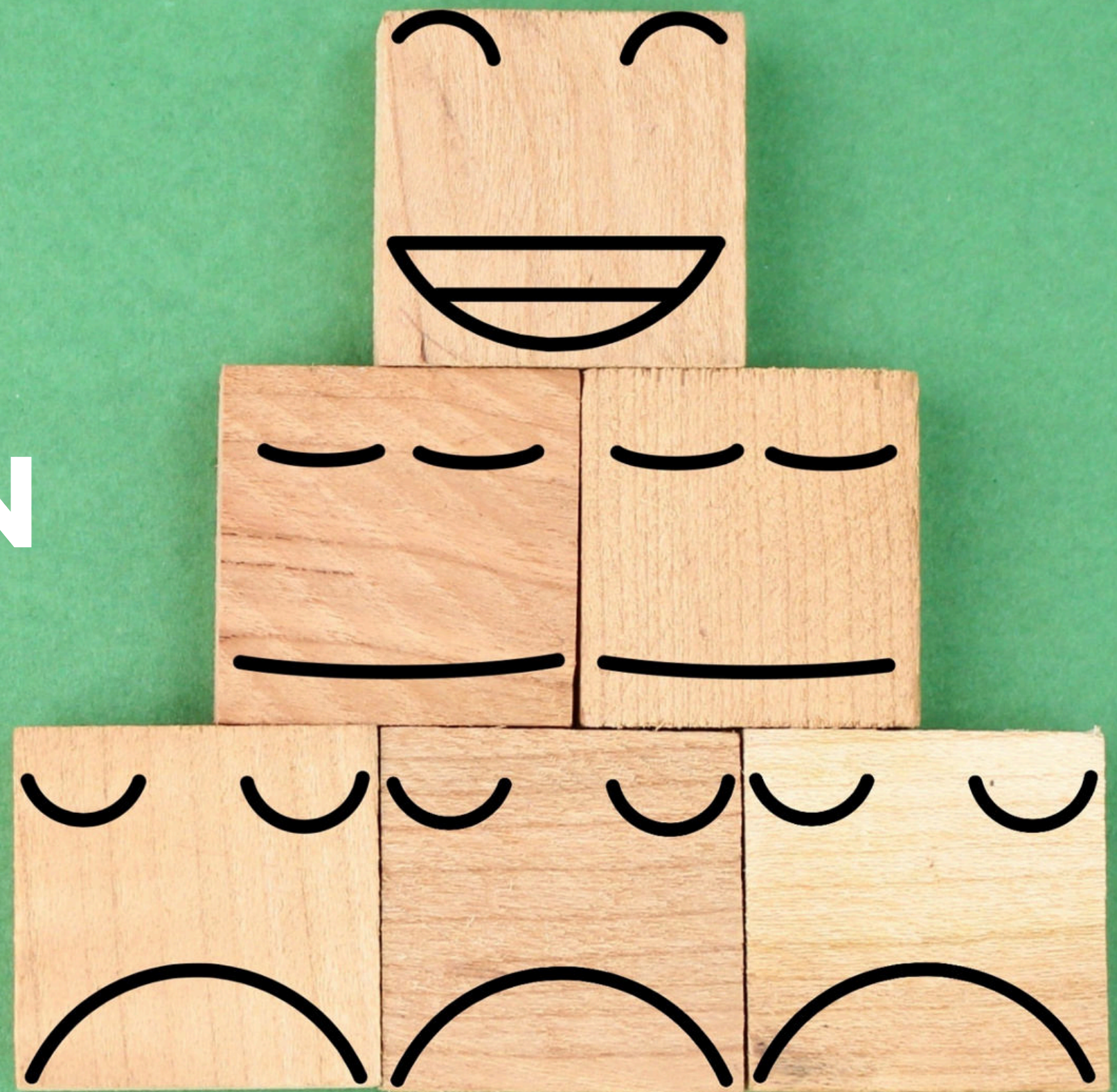


# CUSTOMER SATISFACTION ON AUTOPILOT

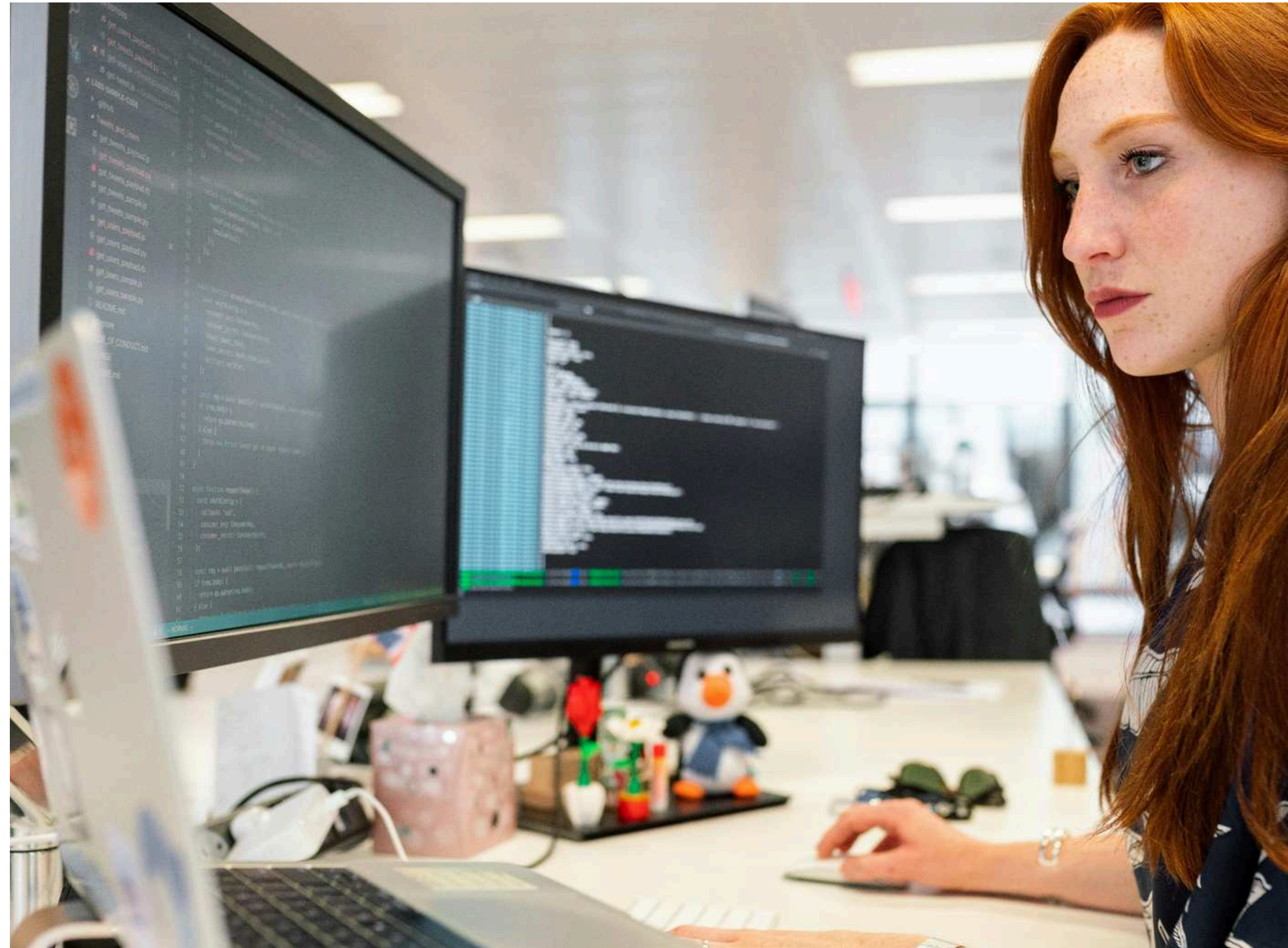
Sophisticated Salesforce Solution for  
Client Support

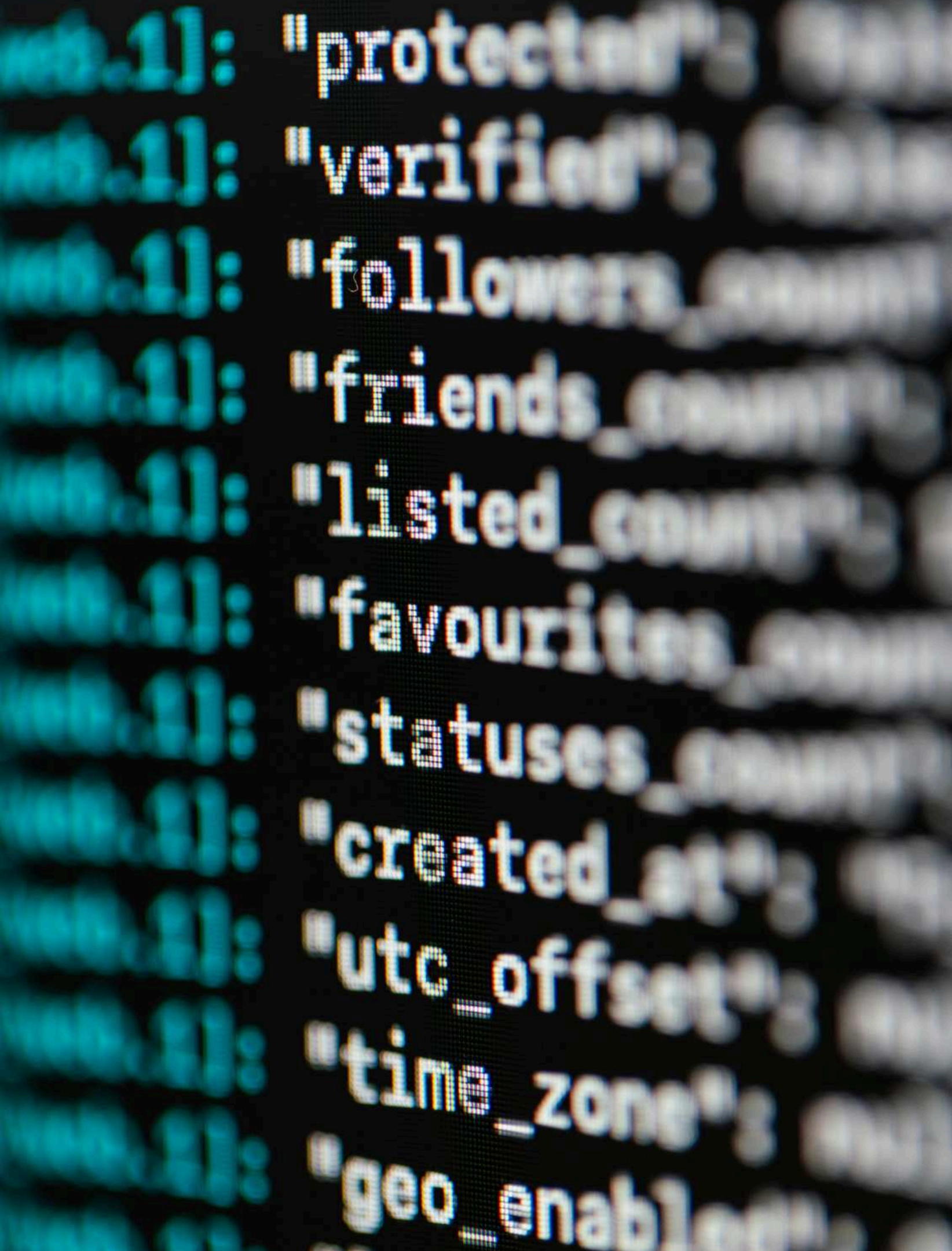


# Bradford Scott's Journey to Enhanced Case Management

**Bradford Scott Data Corporation**, a leading player in the High Tech industry, specializes in delivering innovative software solutions for credit unions and financial institutions. As their customer base expanded, they found their existing case management processes struggling to keep pace. Bradford Scott was using basic tools for assigning and managing client cases, leading to delays in response times and inconsistencies in communication with clients.

The company realized that a more sophisticated solution was needed to handle the increased volume of support requests and improve the overall efficiency of their customer service operations. That's when they turned to us, seeking to implement a system that could streamline their case management process and improve customer satisfaction.





# From Code to Customer Care

To address Bradford Scott's challenges, DTC Force proposed a customized Salesforce implementation that would automate case assignments, notifications, and tracking. The solution was designed to handle the complexity of managing cases for multiple types of customer inquiries, including hardware and software issues. We implemented rules that automatically assigned new cases to the appropriate queues based on the issue type, ensuring faster routing to the right teams.

Additionally, DTC Force set up notifications that alerted both the internal team and clients when a case was updated, ensuring transparency and reducing response times. This overhaul in the case management workflow provided Bradford Scott's team with the tools they needed to deliver better service without being overwhelmed by manual tasks.

# Measuring Service Efficiency With Data-Driven Insights

One of the most important aspects of the Salesforce solution was the ability to track and measure key performance indicators around case resolution times. We built custom logic that calculated the time taken from case creation to when it was first assigned to a representative, providing Bradford Scott with a clear understanding of how efficiently their support system was working.

Additionally, by creating fields that captured case updates and modifications, the company could now monitor every touchpoint in the customer support journey, gaining valuable insights into their team's performance. This data became crucial for their management team, allowing them to make informed decisions about how to optimize their service delivery.



## Empowering the Team

# Training and Support for Long-Term Success

While the Salesforce solution provided the technical infrastructure, empowering Bradford Scott's team was essential for long-term success. We conducted personalized user training sessions, ensuring that their staff could seamlessly navigate the new system and leverage its full capabilities.

Our training focused on making the complex simple—helping the team understand not just how to use Salesforce, but how to use it to better serve their clients. Post-implementation, we offered 30 days of complimentary support to ensure that the transition was smooth, and the system was running effectively. This combination of technology and training empowered Bradford Scott's team to deliver high-quality service with confidence.



A person is walking away from the camera through a vast field of green grass and white daisies. The sun is low on the horizon, creating a bright glow and long shadows. The background shows a line of trees and distant hills under a clear sky.

Scaling for Growth

# A Future-Proofed Solution

With Salesforce now embedded into their operations, Bradford Scott Data Corporation is well-positioned to scale their customer support as they grow. The implementation has significantly reduced the manual workload for their team and improved the overall speed and accuracy of case management.

The company can now handle a higher volume of cases without compromising on quality or customer satisfaction. As they continue to expand, this new system will allow them to easily adapt and evolve, ensuring that they remain at the forefront of customer service excellence in the high-tech sector.

## **Disclaimer**

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