CRITICALRIVER

A large Visa Processing Company Increased Efficiency, User Adoption with Greater ROI by Retiring Legacy Platform and Implementing Service Cloud Lightning.

The customer is a renowned passport and visa processing services company reckoned the go-to choice for travelers, for their swift, and reliable passport and visa services. In a short span of time, the company grew by leaps and bounds with a huge network across the USA is a testimony for enriching the experience they provide to their customers.

The company was using a desk.com application and migrating to an advanced Service Cloud Lightning had become imperative as Salesforce retired desk.com (not available for new customers since March 13, 2018, and complete shutdown on March 13, 2020). The customer contemplated in-house migration process, but soon realized professional expertise is paramount, thus CriticalRiver was approached to implement the migration process.

Migration Process and Challenges:
- Determining the size, scale and magnitude of the process
- Comprehensive review, auditing of existing systems and procedures
- Consolidate inventory of assets, creating a risk assessment report
- Considerable amount of time spent on data analysis, preserving history data, data backup plan, data mapping, and migration
- The biggest challenge was ensuring business continuity, while the transition/migration process takes place with replacing the old system with a new system

CriticalRiver Engagement and Implementation Process:
- Leveraged data migration wizard to migrate all data dynamically from Desk to Service Cloud, including but not limited to:
  - o Companies, Customers, Cases, Interactions, Notes, attachments
  - o Articles Data – Text, Article Translations, Embedded Images, Article Attachments
- Customization of functionalities in Apex Classes, Apex Triggers, Workflow Rules, Process Builder and Visual Force enabled auto-populating of the account name and content information
- Customized the Case List View tailored to specific users' requirements in the Service Console
- Leveraged email templates to create macros (automates email process) to trigger emails to customers dynamically from the service console
- Created robust dashboards to generate insightful reports for passport, visa services provided for a specific customer to a specific country
- Implemented globally accepted standards, best project management practices, tools, and technologies for the entire duration of the project.

Benefits/Results
- Significant increase in employee/customer satisfaction and engagement
- Eliminated clutter and enhanced the efficiency with simultaneous records view in a single window
- Customized case view list provided flexibility to easily see each case information relevant to business
- Quick resolution of each customer's case with the easy and full context of customer interaction in the streamlined dashboard
- Automated email process reduced repetitive, multistep tasks, and empowered with better targeting of campaigns
- Increased employee productivity with 360-degree customer data on their fingertips
- Enabled data-driven informed decision-making with robust dashboards and real-time reports
- Reduction of operating and IT support costs
- Increased efficiency and user adoption resulting in greater ROI

Industry: Travel Services

The Customer
The customer is a renowned company offering passport and visa processing services to their customer across the USA. Known for their accountability, transparency, and commitment to quality service delivery, they have digitally transformed their enterprise with cutting-edge disruptive technologies and CriticalRiver is happy to have assisted them in this transformation.

Solution Component
Salesforce Service Cloud Lightning

Customer Speaks
We were using desk.com, Our need was urgent and we needed to migrate to an advanced platform. CriticalRiver's team helped us migrate from Desk.com to Service Cloud in record time while ensuring business continuity. I would absolutely recommend CriticalRiver to deliver technology services on time and within budget.

Rob Lee
Founder & CEO, Swift Passport Services

salesforce silver consulting partner