

## CASE STUDY

Large Equipment Financing Company - Salesforce Transformation



Our client is Canada's largest and longest standing equipment financing company. They provide a full range of financing services in agriculture, construction, transportation, forestry, health care, commercial, and golf and turf equipment industries.

## THE CHALLENGE

Our client was seeking for ways to improve the experience of their customers and required a single, comprehensive view of their clients that could be shared across the entire business. For more than a decade, the business had been using Salesforce

Classic for all its customer support requests. They needed to migrate to a more modern, agent-focused user experience in Salesforce Lightning that would enable their agents to communicate with their customers seamlessly across multiple channels.



# THE APPROACH

By working closely with Online as a trusted advisor, they made the following enhancements to ensure that they had:

- > Created a robust framework for technical development, change management, and data governance
- > Implemented Financial Services Cloud to grant the business a unified view of each customer, unlocking key insights that have helped drive deeper client relationships
- > Migrated the business to Salesforce Lightning and developed a custom app utilizing Lightning Service Console with tailor-fit web components to meet their agents' needs better and enhance productivity
- > Added Salesforce Omni-Channel for Service Cloud, streamlining disparate communication channels and enabling the organization's Canada-wide broker network to connect to its customers in real-time
- > Connected Salesforce to the live chat on the company website along with mobile messaging for their agents to give them the ability to have personalized, conversational support through SMS and other popular messaging apps

# THE RESULTS

By spearheading the business' transition to Salesforce Lightning, Online delivered a modern Salesforce solution that increased operational efficiency for their entire agent network. Financial Services Cloud has helped unify the company's digital and traditional channels to create a 360° view of their customers, allowing for personalized and contextual interactions through each step of their engagement journey.



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