

Using Salesforce to Expand Operations to New Markets

For over a hundred years, this leading U.K. provider of appliance breakdown protection has been a trusted provider of aftercare for millions of domestic appliances. They offer protection, maintenance, and support for a broad range of domestic products and consumer electronics, ranging from televisions to washing machines to boilers. Looking after 23.9 million products, their expert service network repairs or replaces nearly 3 million appliances every year.

They manage the entire warranty process: Customer mailing, contact centers, repair networks, in-house administration, and claims handling. When they decided to expand their international operations with a new branch in the U.S., they turned to Silverline to design a policy administration system that uses the robust features and integrations of Salesforce.

The need: Building a new foundation for U.S. operations

With an international presence in Europe and Australia, this U.K. company saw a major opportunity in establishing a base of operations in the U.S. But with opportunity came challenges, namely creating an entirely new system to manage all aspects of their business.

They needed a partner that could look at their needs from the perspective of both the customer and the contact center agent, and design a solution that could help the company grow in a new region. Silverline has over 110 platform certifications for Salesforce Industries (formerly Vlocity) insurance solutions.

Our comprehensive understanding of the platform helped us design and implement the right set of tools to solve their business challenges. We were also instrumental in helping with this company's localization efforts. Certain words and visual iconography had a different meaning overseas, and we helped them localize the language and design for American employees and customers.

The solution: Low-code functionality and robust integrations

To start, the project focused on out-of-the-box Salesforce Industries functionality to guide users through complex sales or service processes. Using minimal code, Silverline created dynamic customer interactions that could be deployed to multiple channels and devices. This included building an internal call center view in Salesforce Customer 360 to handle registrations, quoting, payment, cases, and claims.

The company chose Genesys CTI as a partner to pick up and route phone calls. To implement this, however, Genesys had to be connected to a physical phone line, which took an extra hardware installation step that required collaboration with the telephone service provider.

A suite of other integrations that boosted the power of the Salesforce platform:

- **Semaphone/Paysafe** provides the capability to process credit cards over the phone through tokenized transactions. The contact center agent never sees credit card information. Instead, customers input their credit card information over the phone, and Semaphone/Paysafe creates a token that is then sent to Salesforce and used to make monthly payments on the plan.
- **Vertex** calculates the tax for different counties and determines when it is applied.
- **SDocs** handles the formatting and delivery of documents when customers choose a protection plan, whether it is through email or printed hard copies.
- **Registria** makes it easy for customers to register their appliances by simply scanning a QR code with their smartphone.
- **Talend** facilitates the transfer of data, sending out data from Salesforce while pulling in claims information from vendor feeds.
- **Google Places** automatically fills in address information to ensure the company gets an accurate address to send communications.

The result: An intuitive platform with complete transparency

With their Salesforce platform in place, this company could start servicing U.S.-based clients with a solution that is easy to use and easy to train. Our UI/UX designers stayed on throughout the entire project, creating an intuitive structure that enables agents to demonstrate a registration or sale after only a single walkthrough.

When a customer calls, the system looks at the phone number and name and uses matching criteria to provide the call center agent with any recorded information about the customer, such as previous cases or registered appliances. It also shows a non-match, prompting the agent to set up a new customer and taking them to that page within Salesforce. Every interaction with the customer is stored as an activity within Salesforce, providing full visibility into each customer touchpoint.

The company plans to work with more U.S. vendors, and with Salesforce, they have a platform that scales with them. Silverline will be here to guide them as they grow, helping them cultivate more business in a new market.

About Silverline

Silverline leverages insight acquired through thousands of engagements along with real-world expertise gained across the Financial Services industry, including: banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform. To learn more visit: <https://silverlinecrm.com/financial-services/>