Code42

A Salesforce-based CRM platform paves the way for a SaaS company to enhance service and grow

The solution establishes robust new capabilities, including customer self-service tools, for meeting the needs of its growing enterprise customer base.

The Challenge

Supporting projected growth

Code42 recognized that its legacy customer relationship management (CRM) system would not be able to support the company's projected growth. The company sought a flexible new platform for handling enterprise customers' issues and for equipping its team of engineers who service customer calls and incidents with:

- Customer information
- Case status
- Relevant knowledge articles
- Communication/collaboration capabilities
- A customer feedback loop

In addition to establishing a platform that would support its growth, Code42 also wanted the solution to improve data security and enable customer self-service capabilities.

Code42 sought assistance from West Monroe Partners, a Salesforce Certified Platinum partner with a strong blend of SaaS industry experience and extensive Service Cloud expertise.

> *In my experience with West Monroe Partners, I felt like their primary emphasis was on being a great partner. They guided us in areas we lacked experience while listening to our needs and being flexible throughout the project lifecycle. I look forward to working with West Monroe Partners in future projects.*

MARK MUELLER
CODE42

Code42 is a global enterprise SaaS company that provides automatic, continuous cloud backup for the mobile workforce and complete visibility and control of end-user data for IT. With Code42, IT and security teams can pinpoint data loss resulting from insider threats, monitor data movement, recover data no matter the cause of data loss, and respond to data breaches rapidly and accurately, with or without the device.

KEY ENHANCEMENTS

Establishes ability to report on service level agreements (SLAs)	Enables customers to determine when a case is ready for resolution	Reduces case lifecycle turnaround time	Enables customers and agents to communicate easily to create, update, and resolve cases

The Solution

A platform using Salesforce Service Cloud, LiveAgent, and Communities

West Monroe Partners worked with Code42 to replace the company's legacy ZenDesk and LiveChat solution with a flexible, scalable CRM platform for enterprise customers utilizing Salesforce Service Cloud, LiveAgent, and Communities. The project team also integrated the new solution with ZenDesk for managing issues experienced by small business/consumer segment customers.

The Approach

Valuable new functionality

Service Cloud case dashboard: The dashboard includes icons and filters that identify the highest priority cases. It also allows agents to see target dates/times for key milestones.

Community: Customers can create a case, chat with an agent, and view announcements from the Community home page. The Community site also allows customers to mark a case as ready for close, thus notifying agents to resolve the case.

LiveAgent chat sessions: Agents can access customers profiles while corresponding with customers. Managers can "whisper" to agents, if they require help during a session.

MindTouch knowledge article integration: This feature automatically returns results based on the case subject. Agents can link articles to cases, and customers can view related articles from the Community.

Qualtrics customer satisfaction survey: Customers receive a survey once a case is marked closed. Agents can see survey responses at the case level and average Net Promoter Score® at the account level.

The Impact

Greater visibility, faster resolution, more satisfied customers

Replacing ZenDesk with Service Cloud for enterprise customers reduces Code42's turnaround time for resolving cases. The solution provides customers with user-friendly capabilities for searching for information, chatting with agents, and creating and resolving cases. At the same time, Code42 gains greater visibility into case status and more accurate and accessible tracking and reporting tools to support responsive service.

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