

Delivered Huge Savings by Integrating Salesforce with PEGA

The client is a Fortune 100 cards and payments company with operations across the globe. They were using Salesforce for Merchant Services and PEGA for Case Management. Using the two separate, non-integrated systems was very costly and meant that the process was running slower and less efficiently than the business required.

BUSINESS GOALS

- Provide visibility into all World Service cases submitted by merchants or Client Managers
- Improve case quality and reduce resolution time by ensuring all required data are captured at the beginning of the process
- Improve merchant experience with automated communication throughout the case lifecycle
- Improve tool and process efficiency

CHALLENGES

Approximately 60% of the client's Customer Support Cases were sent to their World Service team with incomplete information. Because the systems were not integrated, they relied heavily on manual intervention to update, create and edit cases in both PEGA and Salesforce. They also needed to link processes and information between the Salesforce and World Service teams, resulting in higher operational expenses.

Making matters worse, the client was paying a dual licensing cost, because the CLM helpdesk had to be able to access both Salesforce and PEGA. Other challenges included:

- Slow response to merchant requests resulted in low customer satisfaction
- Poor visibility into cases submitted directly by merchants or by CLMs themselves
- Incremental development costs had to be paid to Salesforce every time a new type of case was added

SYNTEL SOLUTION

Syntel helped the client seamlessly integrate Salesforce with the PEGA case management system in order to improve performance and reduce the amount of manual work. We also implemented some new functionality, including:

- The **flexibility** to add new a case type or market via the Business Admin Module whenever required
- Enabled Salesforce to get **real-time case definitions** from PEGA, based on case type and market selection
- Ability to **create and update cases in PEGA** directly **from Salesforce**, via Web Service Management and Data Power using service oriented architecture
- Embedded a **document upload UI in Salesforce** so Customer Care representatives could upload attachments
- The ability to save case details in **draft status** prior to completing all the required fields

BUSINESS BENEFITS

The client's World Service team will now receive all required information at the time of request, eliminating rework and improving case quality. Other benefits include:

- Reduced operational cost by eliminating licensing fees for Client Managers and CLM help desk
- Improved customer satisfaction by reducing turnaround time when responding to merchant requests
- Defined, controlled change management process

