HOW TRAILBLAZERS TURN RESILIENCE *into* ORGANISATIONAL SUCCESS

A deep dive into how Salesforce customers in India find success in turbulent times by making service a central part of the organisation's solution.

redBus

GEP INSIGHT DRIVES INNOVATION

cleartax

salesforce

Setting the scene

As the full impact of the pandemic dawned with astonishing speed on organisations across India, service departments faced not only previously unimagined levels of volume but also entirely new demands around personalisation and empathy.

Throughout the early period, as companies scrambled their service teams into a working from home environment amidst changing government restrictions, service teams went above and beyond. They were the voice and the face of their brands as they took on the difficult challenge of working together while apart. Some were able to strengthen their team processes and behaviours, despite being physically separated.

Since then, we have witnessed some spectacular stories of innovation as service leaders have guided their teams, and their organisations, toward new levels of success. In doing so, they're reinventing what service means, building powerful levels of resilience and proving nothing is beyond their support channel.
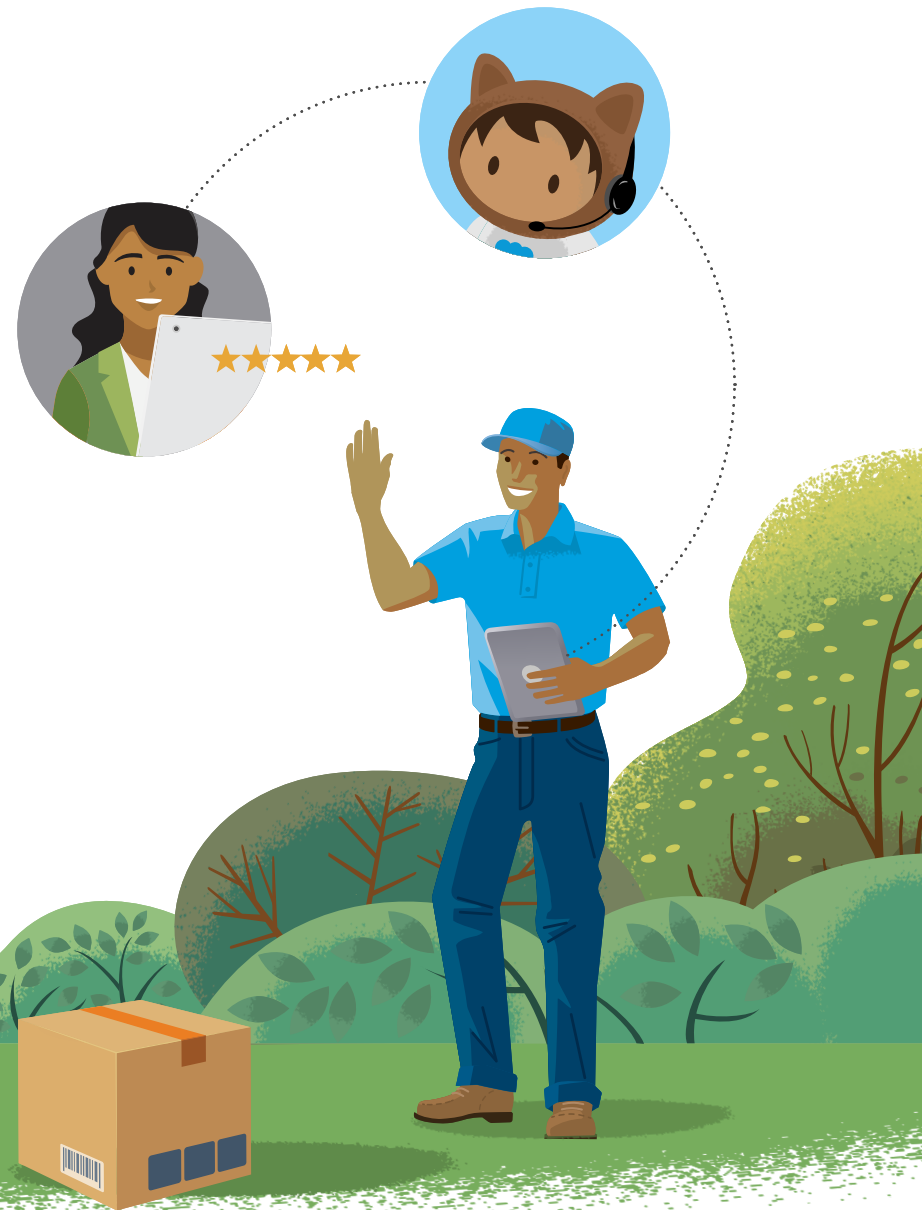
Changing expectations

In India, as in much of the world, as soon as the pandemic struck it became clear that the majority of business continuity plans had not allowed for such an event. Service teams typically working on desktop computers in offices had to be decentralised to work-from-home environments almost overnight.

Not only did they require laptops, they also needed the various applications that would be required to do their jobs, plus reliable internet connections, access to non-voice customer service channels and phone systems that allowed hand-off of customer calls. Few of these vital pieces of infrastructure were immediately available.

As productivity concerns began to arise, caused by various issues including home environments not always being conducive to uninterrupted work, a lack of ability to work collaboratively both within a team and between departments, wellbeing concerns and much more, the expectations of customers also rose.

Not just in India, but around the globe, the way customers wanted and needed to be served changed almost immediately. They desired greater understanding, a higher level of personalisation, a show of deep familiarity and individualisation from the brands with which they were dealing. Existing in an environment of extreme uncertainty, customers had a deep need for the reassuring embrace of an empathetic customer service experience.

Changing expectations

So, as organisations struggled with the enormous challenges of keeping their people happy, healthy and productive, they also had to keep an eye on customer satisfaction levels. Without customers, there would be no business to support the workforce.

Interestingly, service teams faced challenges unique to their specialisation. Traditionally a cost centre as opposed to a profit maker, they faced smaller budgets and tighter restrictions. As businesses struggled in the pandemic environment, often for their very existence, any department that was not a profit centre was also not a priority.

Despite the enormous number of momentous challenges, service teams across India have proven, as their people are enabled to do much more with much less, that they have become providers of business continuity for customers and for the organisation. They are greater than the sum of their parts, providing efficiencies, adaptation, transparency, loyalty and optimisation.

This has all been enabled by the smart use of technology that helps service leaders remotely manage and train their people, carry out complex scenario planning and utilise data to identify trends and patterns. Technology also introduces the landscape-altering power of automation, freeing up service staff from repetitive, low-value work to do what they're best at doing, what they're passionate about.

It has all added up to a happier customer and a more empowered, efficient and adaptable service team. When this occurs, service becomes a business priority, rather than a budget to be slashed.

Meet the Trailblazers

1

An award-winning online bus-ticketing platform that offers web and mobile access, redBus connects travellers to a network of over 2600 bus operators. With a presence in India, Indonesia, Peru and more, the business has over 23 million customers globally.

2

India's number one tax and investing platform, ClearTax is ranked by Economic Times as the best tax website in India. The service is trusted by over 5 million individuals, over 600,000 small businesses, 1,500 large companies and is the platform of choice for over 80,000 accountants and tax specialists.
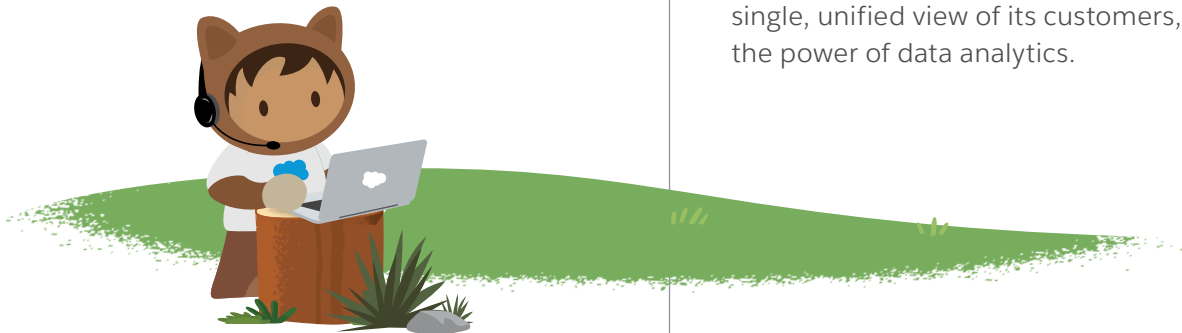
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A leading provider of SaaS-based procurement and supply chain management software, GEP combines future-focussed strategic thinking with innovative technology to provide solutions that deliver game-changing business outcomes.

Tales of service success

redBus

Fuelled by what the business describes as a "relentless obsession" with customer experience, redBus constantly listens to its customers to enhance its offerings and delight its users. At the beginning of the COVID-19 crisis, this meant focusing on refunds, cancellations and journey assistance, which were causing a previously unimagined spike in call volumes. Throwing bodies at the problem would have been cripplingly expensive and ineffective; the only way to cope was through technological innovation – so that's what it did.

ClearTax

With the ultimate goal of simplifying a process that nobody enjoys, the ClearTax offering has experienced good traction since its launch in 2011. It is now the largest income tax returns filing and GST compliance platform in India, used by 80,000 accountants and tax professionals. When ClearTax grew fivefold over a period of just six months, the impact of this rapid scaling on sales and customer service created an opportunity to build for the future. To ensure ClearTax would meet its lofty ambitions it would have to adopt a technology platform that would give it a single, unified view of its customers, and the power of data analytics.

GEP

The challenges faced by GEP's customers around the globe were individually unique and each required an urgent solution. The mostly India-based Customer Support Operations ensure that GEP SMART™, the business-critical, unified, source-to-pay platform is up and running 24/7 and had their hands more than full when the effects of the COVID-19 epidemic began to be felt. Supply chains variously ramped up, wound down, changed shape, expanded and contracted as GEP clients did all they could to ensure business continuity. As the service team transitioned to working from home, empathy became an important ingredient for success. Amazingly, as case volumes rose dramatically, the team found ways to improve SLAs and slash case time resolution, causing customer satisfaction scores to skyrocket.

3x
INCREASE
in call volumes during the
COVID-19 lockdown

1.8
MILLION+ HOURS
collectively saved by users of
ClearTax in filling out tax returns

11
LANGUAGES
spoken by team members of GEP
Customer Support Operations

Optimisation is the name of the game

Sometimes the very best form of service involves no human interaction at all.

Consider the potential frustration and, in the current pandemic climate, potential health concerns, of a customer who has to visit a branch to complete a process that seems as if it should be achievable online. And think of the wasted time and effort of a maintenance technician who must make one visit to attend to a breakdown, then another to the same customer's facility, three weeks later, to carry out scheduled maintenance.

In today's service environment, typically much more must be achieved by fewer people.

The achievement of this goal comes from optimisation of processes and resources. Sometimes this means knowing exactly when you're able to group certain offerings together to reduce time, effort and expense. This means that when the technician attends to solve an equipment breakdown issue, they also know the scheduled maintenance is due soon, and so they can carry out both jobs at once.

It also comes from the wise use of technology – which many of the following case studies demonstrate – to empower customers to complete certain processes themselves, to seek answers and discover solutions without the need to speak with a service agent. When a large percentage of interactions can be managed by technology, particularly when they can be automated and therefore completed more quickly, with no human input and therefore no risk of error, more time and space is left for the high-value issues, and for relationship building.

As these Salesforce clients have discovered, this leads to dramatically improved customer experience as well as a more engaged and satisfied service workforce.

Importantly, it also increases the relevance of the service team to the achievement of the larger organisation's strategic goals.

redBus:
Winning hearts and minds in travel during COVID-19

IN A TRAVEL-BASED business driven by a relentless obsession with customer experience, the pandemic crisis presented an entirely new and potentially dangerous challenge.

Previously, redBus had broken down its customer-focussed obsession into three segments:

1) listening constantly to what customers have to say

2) always striving to enhance service processes and functionalities, based directly on customer feedback

3) personalising the customer experience wherever possible

A very different message and behaviour from customers was witnessed when COVID-19 began to take its toll on travel, one that was completely new for the bus booking business. There was anxiety around cancellations, refunds and travel plans that led to a tripling in call volumes. There were also many questions around the technicalities of what types of travel were allowed.

"Given the massive increase in call volumes, our agent strength was proving to be inadequate, exacerbated by work-from-home tech issues," says Udit Gupta, Senior Product Manager at redBus. "As a result, the abandoned call percentage shot up five to six times, resulting in multiple social media and email escalations."

RedBus turned to what it knew best – listening. They asked what were the specific customer pain points, how they could innovate to address these challenges, and how technology could help.
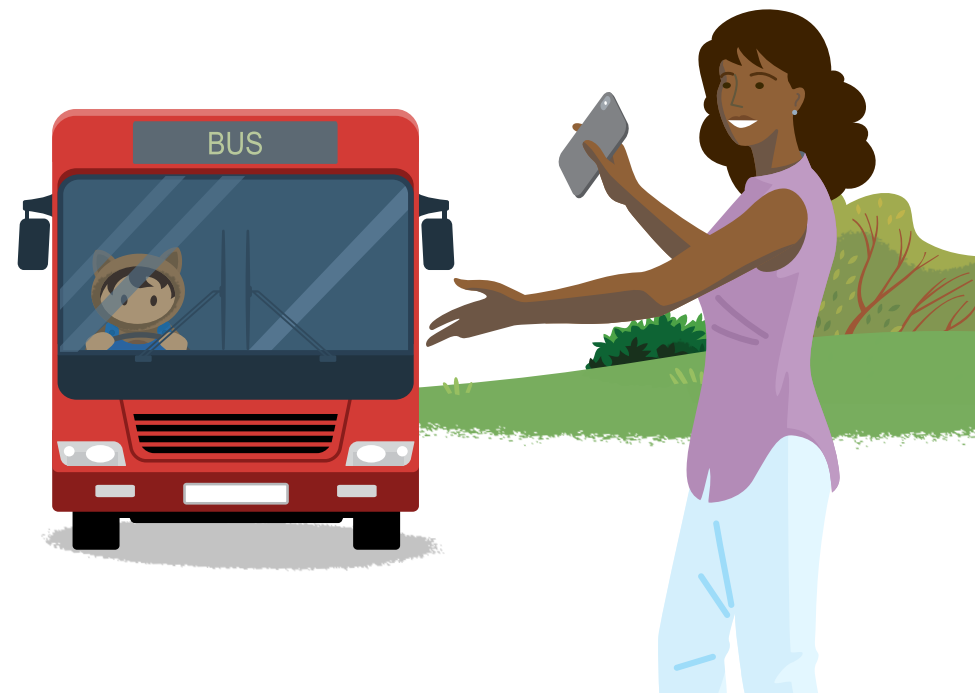
> Our advice to companies that are in service-oriented businesses is to make the customer the focus of all your endeavours.

UDIT GUPTA
SENIOR PRODUCT MANAGER
REDBUS

redBus:
Winning hearts and minds in travel during COVID-19

One of the big issues was the speed of refunds, so redBus implemented 'instant refunds', providing reimbursements within 30 minutes of initiation. Updates sent out to relevant customers kept them informed every step of the way.

Another concern was the COVID-safety of new bookings. To solve this pain point, redBus dynamically blocked adjoining seats to those reserved by the user.

Importantly, non-voice service channels were introduced to help cope with the spike in call volumes.

"Within three weeks of the lockdown, we created a customer self-help module, redBuddy," Gupta says. "Leveraging the omni-channel support capabilities of Salesforce Service Cloud, we automated our workflows to redirect customer calls to redBuddy ... We have seen the volume of non-voice customer interactions rise to 47.3%, from 25% before the lockdown."

Soon, 70% of calls were being resolved through self-service, with only 30% reaching live agents empowered by Service Cloud.

Critical data from all service channels was consolidated on a single system, giving a single point of data truth for customer interactions. A Service Cloud Knowledge Base was also set up for all service agents, ensuring they all had the information they needed to deal swiftly with any customer queries.

Agents now have end-to-end visibility over all consumer transactions and on every communication channel, meaning all new conversations begin where they left off.

"Our advice to companies that are in service-oriented businesses ... is to make the customer the focus of all your endeavours," Gupta says. "Identify customer needs, personalise customer experiences, and invest in technologies that help you respond to customer needs rapidly, during a crisis and beyond."
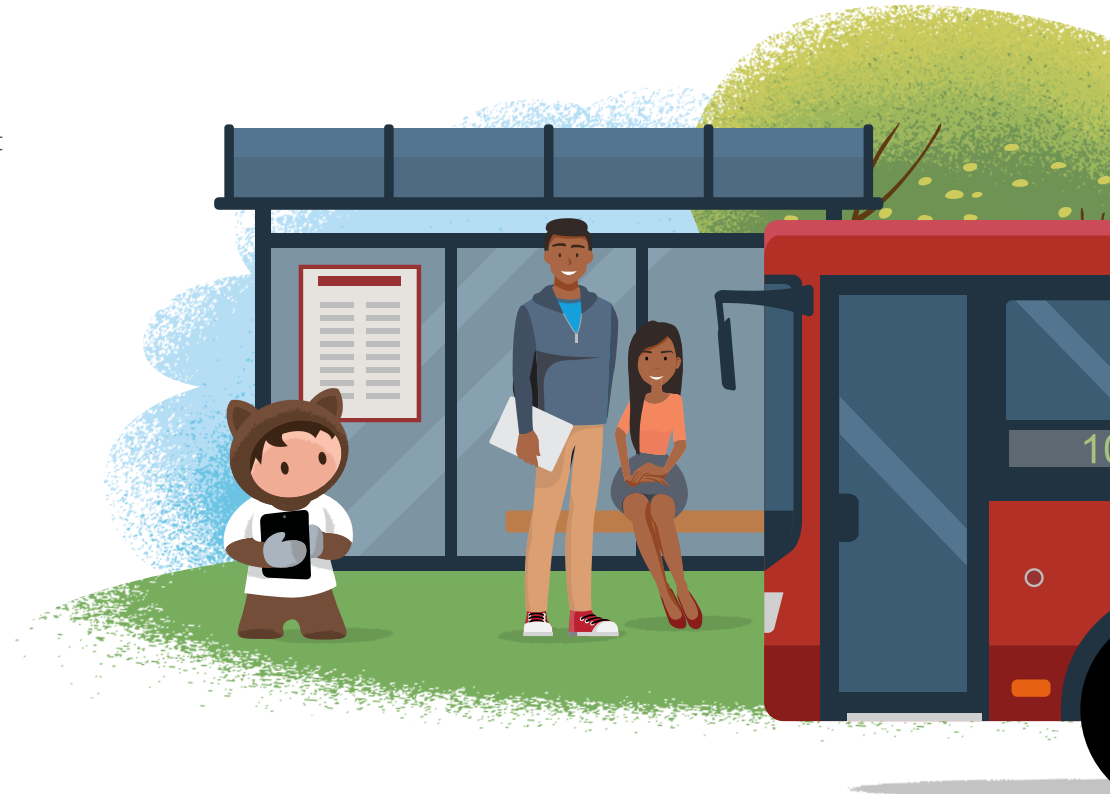
redBus:
Winning hearts and minds in travel during COVID-19

INDUSTRY

Travel, Transport and Hospitality

SOLUTIONS

Service Cloud

Sales Cloud

40 seconds
reduction in average call handling time per call

1.8%
point increase in CSAT score after regional languages were introduced to increase personalisation

68%
customers who opted to use regional language support in lieu of English

ClearTax:
Personalising millions of customer journeys

AT CLEARTAX, employee performance is measured first and foremost against customer goals. The more customers able to meet tax filing requirements and deadlines on their own, the higher the company's staff are judged to be performing.

It's a fine measuring stick in a normal business environment, but during a pandemic and after a period of manic growth it could well have been the business's undoing.

When ClearTax first approached Salesforce, the previous six months had seen five-fold growth in the business. Data was held across multiple spreadsheets and the effects of that distributed gathering of data were beginning to show. When customers faced technical challenges, it wasn't always immediately clear what stage of the customer journey they were at or what their last interaction had been. There was no unified customer view offering real-time data. And siloed data meant there was little collaboration between teams.

"Our customers loved the experience of our online platform for e-filing of GST," says Archit Gupta, Founder and CEO, ClearTax. "But, as with the adoption of any new tool, they sometimes faced technical challenges. When a customer is not able to use a tool effectively, they could develop negative feelings towards it. And we will only be able to provide a positive experience if we are able to proactively identify their struggles and offer timely help."

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ARCHIT GUPTA
FOUNDER AND CEO
CLEARTAX

ClearTax:
Personalising millions of customer journeys

In keeping with their customer-first approach to business, the ClearTax team wanted to proactively reach out to customers during the challenges of the COVID-19 crisis to offer help and advice at scale. That's where Salesforce came in.

Service Cloud gave sales professionals the ability to monitor prospects, know the customer journey of every prospect and customer, prioritise opportunities and use integrated data to gain insight into customer behaviour, trends and more.

When issues arise, the team knows customers as individuals. They know who they are, how they use the ClearTax offering and what interactions they have had in the past.

Most powerful was the automation offered by the technology around billing and renewal processes, dramatically reducing the need for manual intervention across numerous organisational processes, and freeing up service staff to conduct higher value work.

The data-driven system has meant the dream of proactive customer assistance is now a reality.

"We will now be able to help customers through their entire filing journey," Gupta says. "With integrated data from the metabase, we will be able to track data on which step of the filing process a customer is in. We'll know exactly where they're stuck and can proactively reach out to them to offer assistance."
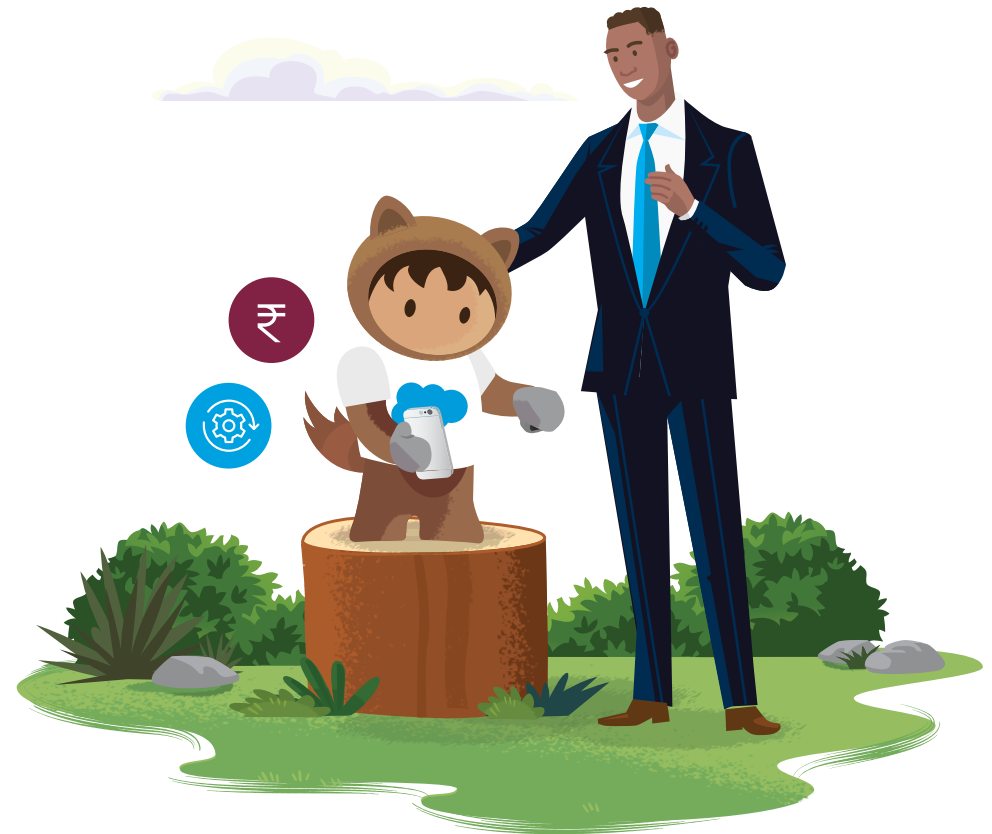
ClearTax:
Personalising millions of customer journeys

INDUSTRY

Financial Services

SOLUTIONS

Service Cloud

Community Cloud

Data helps every department

The sales team has become a hero of the organisation. It's all thanks to their technology solution, which streamlines the work of several other departments and boosts productivity with its powerful, single view of each customer.

"Overall, we expect to see more integration and collaboration across sales, operations, legal, and support teams," Gupta says.

"We put our customers first. And with Salesforce, we are investing in customer-centricity, so we can provide the best experience to our customers, no matter what the situation."

GEP:
Empathic management of hard business challenges

IT'S NO SECRET that the COVID-19 pandemic has had a debilitating effect on supply chains, with unique interruptions and serious challenges almost every step of the way. From the supply of raw materials, to the transport of finished goods, to massive variations in demand from the market, business has been anything but usual for organisations that rely on long supply chains.

Before approaching Salesforce, leading provider of procurement and supply chain software GEP already had a CRM solution. However, it was one that did not integrate easily with other systems or offer extensive reporting or automation capabilities.

"We were expanding rapidly and wanted a scalable solution that could offer real-time data and analytics," says GEP's Customer Support Operations leader Sandeep Nayar, who manages a global, distributed team that works on Salesforce Service Cloud to support customers in 11 languages. "Further, Salesforce is a market leader and we trusted the solution."

"We had to make sure that we could support customers and take things forward. There could be no disruption in our offerings, or the way customers wanted to use our services."

> We were expanding rapidly and wanted a scalable solution that could offer real-time data and analytics.

SANDEEP NAYAR
CUSTOMER SUPPORT OPERATIONS LEADER
GEP

GEP:
Empathic management of hard business challenges

GEP set up the system to allow self-service both within the business and externally. Customers can find vital information through a Customer Community Portal offering Knowledge Base articles and FAQs, without needing to speak with a service agent. And the service agents themselves use the platform not just to log cases, but also to access a centralised, single view of each customer. As the system is cloud-based, it is available to agents anywhere and any time, on any device.

Then came the COVID-19 pandemic. Nayar and his team quickly transitioned to working from home, resolving customer issues and supply chain disruptions remotely.

Case volumes rose almost 9%, but thanks to the single-customer view across email, phone and website touchpoints, and the ability for customers to self-serve to solve their own issues quickly via Customer Community and chat bots, service agents could focus on solving the more complex requests.

In spite of challenges like higher case volumes and remote working, SLAs improved by 5%. Agents also showed strong empowerment and ownership around the solving of customer problems as the more repetitive, lower value tasks were automated. The new system instilled in service staff a powerful sense of empathy for customer plights.

"They are aware of customer pain," Nayar says. "Customers are working remotely and dealing with an unprecedented crisis. Agents know that customers are really under pressure to deliver, and timely resolution of issues on our part will help them."

GEP:

Empathic management of hard business challenges

INDUSTRY

High-tech
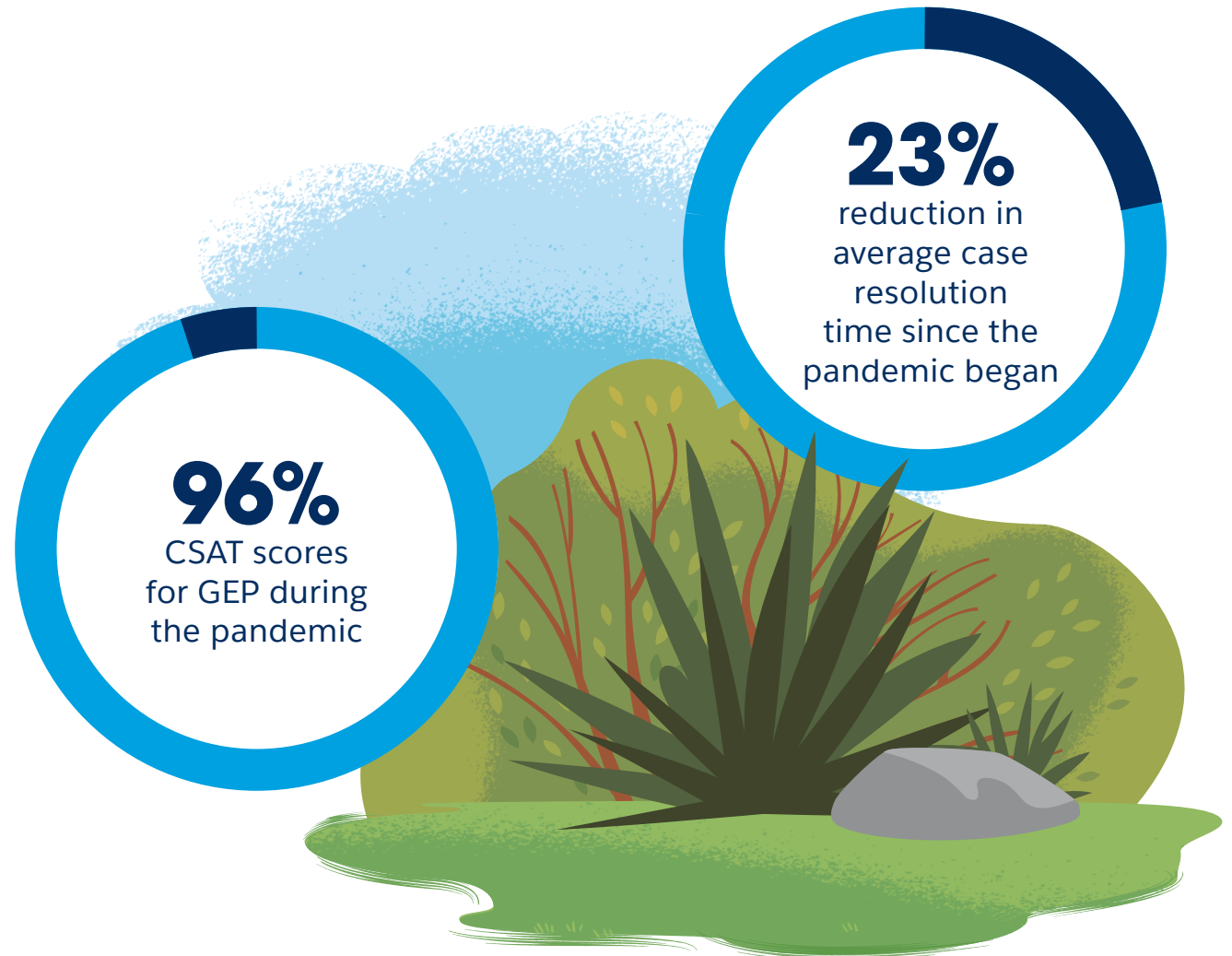
SOLUTIONS

Service Cloud

Community Cloud

Einstein Analytics

23%
reduction in average case resolution time since the pandemic began

96%
CSAT scores for GEP during the pandemic

How can you become a resilient service trailblazer?

The common thread throughout each of these customer stories is a platform that provides the flexibility and agility to respond and adapt in a changing situation, adding value to the organisation and vastly improving customer and employee experience. That's how resilient service organisations...

☐ **Scale support across channels**

☐ **Give agents a complete view of the customer**

☐ **Provide the most personalised customer experience**

☐ **Use analytics to monitor performance**

☐ **Make data driven decisions to keep mobile workers safe**

☐ **Upskill teams in the new normal**

To learn more about how Salesforce can help you respond now and build a resilient service organisation for the future, discover Salesforce's service solutions that are specifically tailored to challenging times.