



Case Study

Accelerating FinTech Excellence: A Salesforce Success Story

Client: Global FinTech

Key highlights



90% First Contact Resolution (FCR) rate.



\$20 million customer service interactions.



60% reduction in Customer Support Agent (CSA) efforts through AI implementation.



54% increase in contact volume serviced following the launch of CRM360, a ground-breaking teammate experience powered by Salesforce Service Cloud.



Executive Summary

In response to rapid growth and acquisitions, our client embarked on a transformative journey to enhance customer service and operational efficiency. With a strategic focus on CRM consolidation, leveraging Salesforce Service Cloud, the initiative delivered outstanding results.

90% First Contact Resolution (FCR) rate, \$20 million in customer service interactions, and a 60% reduction in Customer Support Agent (CSA) efforts through strategic AI implementation.

From boosting FCR rates to significant savings in support efforts, our client's commitment to innovation has reshaped the FinTech landscape.

Background

Navigating complexities in an ever-evolving market, our client prioritized customer-centricity, innovation, and strategic partnerships. Recognizing the importance of streamlined CRM systems, they focused on enhancing visibility, deepening customer insights, and ensuring seamless operations. These goals were achieved through a unified platform (Salesforce) that integrated data and operations seamlessly.



Solution: Revolutionizing Customer Engagement

CRM360, a game-changing approach to customer engagement. Powered by Salesforce Service Cloud, CRM360 automated and personalized customer interactions, establishing an enterprise contact center and integrating AI-driven solutions for unparalleled efficiency and brand elevation.

Scalability and Future Readiness

With Salesforce Service Cloud as the driving force, our client's solution ensures scalability and future readiness. Positioned for continued innovation, our client is equipped to adapt to evolving industry demands, maintaining market leadership and exceeding customer expectations.

Business Outcomes



60% Reduction in CSA Efforts

Strategic AI implementation streamlined support processes, freeing up resources for higher-value tasks.



Unified Working Environment

CRM360 consolidated teammate tools, fostering collaboration and productivity.



90% FCR Rate

Effective issue resolution during initial contact showcased our client's commitment to exceptional service.



\$20 Million in Customer Interactions

Proactive engagement and personalized service translated into significant revenue growth.

Conclusion

With Salesforce, our client has redefined the FinTech landscape, showcasing the power of innovation and strategic partnership. From an impressive 90% First Contact Resolution rate to substantial reductions in support efforts, the results speak volumes. Yet, this is just the beginning.

Armed with scalable solutions and a commitment to future readiness, our client is poised for continued growth and market leadership. This success story exemplifies the transformative potential of Salesforce in driving business excellence and exceeding customer expectations.

About Altimetrik

Altimetrik is a pure-play digital business services company. We focus on delivering business outcomes with an agile, product-oriented approach. Our digital business methodology provides a blueprint to manage data and develop, scale, and launch new products to market faster. Our team of 6,000+ practitioners with software, data, cloud engineering skills help create a culture of innovation and agility that optimizes team performance, modernizes technology, and builds new business models. As a strategic partner and catalyst, Altimetrik quickly delivers results without disruption to the business.