Sales Rotation - A Salesforce Custom Application

Client

Our client is a #1 FinTech marketplace offering small business financing and services. Harnessing the power of smart technology and smart people, they have secured over $1 billion in financing for small business owners to date. Their expert Business Financing Advisors work with over 75+ Lender Marketplace in real time to get easy access to the best low-interest SBA loans, short and long-term loans and business lines of credit, as well as a full suite of revenue-driving business services. Expediting the approval process down to hours, they help entrepreneurs to focus on their business growth.

Objective

The client uses Salesforce platform for managing their CRM requirements. Their business process is that their prospects would call a contact centre, where the agent would understand their high level requirements, determine the lead category and assign the lead to an appropriate sales representative for further support.

The agents were manually tracking the number of leads assigned to each sales rep. However, they were not getting any real time update regarding availability of sales rep which was leading to unpleasant customer experience and loss of leads.

The customer wanted a solution which would help the agents to quickly check the availability of sales representatives and assign the lead to them, while simultaneously ensuring uniform distribution across all reps.

The challenges

Considering the peak call volumes, the application had to be designed to facilitate quick selection of 'appropriate' and 'available' sales rep and assign the lead with as minimal clicks or inputs as possible.

Since the client has invested in Salesforce and agents are familiar with the same, the solution needed to run with in Salesforce. It should be possible for agents to minimize the application when there are no calls and continue to work on Salesforce.

The Solution

The application was designed as a Salesforce Console Footer Widget and deployed as a normal responsive page on Salesforce Classic. Custom objects were designed to store categories and other intermediate information and counts. UI was designed as per Salesforce guideline. Auto refresh feature was added for real time updates. Lead assignment counters were automatically reset at the beginning of each day.

The solution provided for the following features:

- Ability to configure lead categories and assign sales reps to categories they can handle.
- Ability to assign/change Sales rep status such as 'Skip turn', 'out for the day', 'out for lunch' etc.
- Ability to select a category and see list of active sales reps in the category in the descending order of leads assigned for the day.
- Ability to assign or remove a lead to a sales rep.
- Maintain the queue list of sales reps depending on their status and assignments.
- Ability to see the history of all lead assignments and removals.
- Auto refresh assignment status at frequent intervals which is configurable.

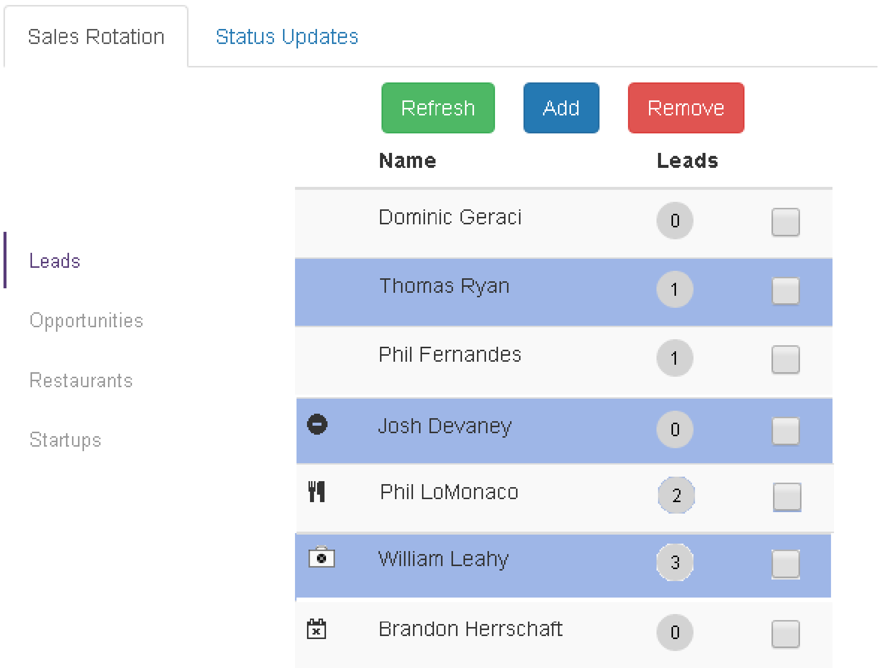
Benefits

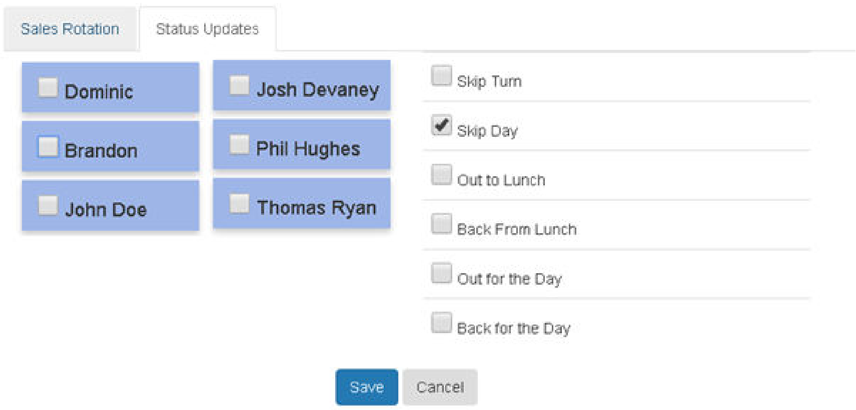
The agents were able to handle increased call volumes and assign leads to the right sales representatives. The sales reps were also happy because everyone received a fair share. Overall, the client was able to receive very positive feedback from their customers and realized a 200% increase in their responsiveness score.

Technology Used

- Visualforce
- CSS
- Bootstrap
- JavaScript
- Apex
- Salesforce Object Query Language (SOQL)

Indicative screen shots:





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