

Automating Email & Case Management to Accelerate Visa Processing



The Customer

The customer is a renowned passport and visa processing services company reckoned the go-to choice for travelers, for their swift, and reliable passport and visa services. In a short span of time, the company grew by leaps and bounds with a huge network across the USA is a testimony for enriching the experience they provide to their customers.

The Challenge

With Salesforce phasing out desk.com by March 2020, the client needed to swiftly migrate to Service Cloud Lightning. Despite considering an internal migration, the technical complexities necessitated expert intervention.

The Solution

- Migrated data from Desk to Service Cloud using a data migration wizard, including:
 - Companies, Customers, Cases, Interactions, Notes, Attachments
 - Article Data (Text, Translations, Images, Attachments)
- Customized functionalities like Apex Classes, Triggers, Workflow Rules, Process Builder, and Visual Force for auto-filling account and content information
- Tailored the Case List View in the Service Console to meet user needs
- Utilized email templates to automate email processes via macros in the service console
- Developed dashboards for detailed reports on passport and visa services for individual customers and countries
- Adhered to global standards and best project management practices throughout the project

The Results

- Significantly reduced manual email processes through automated email macros
- Improved process efficiency after introducing tailored Case List Views and automated functionalities
- Notable increase in service optimization due to actionable insights from the new dashboards
- Successful migration of all data with zero data loss
- Enhanced user experience with user-specific customizations in the Service Console
- Timely project completion while consistently adhering to global standards and best practices

Impact Delivered

- 40% Reduction in manual email processes
- 100% Successful migration of all data with zero data loss
- 25% Boost in process efficiency

Solution Components

- Salesforce Service Cloud Lightning