



A Case Study

Improving Salesforce Adoption & ROI for Retail Merchant Services



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0.4%

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Gauri delivered:

- Salesforce Health Check
- Improved Onboarding Process
- Improved First-Call Resolution
- Improved User Adoption
- Best Practice Adherence

About RMS

In the highly contested market for retail card payment solutions, sales process optimisation, rapid onboarding and customer service excellence are essential for providers to successfully grow sales and reduce customer churn.

Retail Merchant Services Ltd (RMS) are one of the UK's largest payment solutions providers serving thousands of businesses across the UK & Ireland. They had reached an inflection point with their Salesforce CRM believing it wasn't delivering sufficient value and doubted it would enable them to achieve their ambitious growth targets going forwards.



Gauri understand Salesforce inside out. They're very approachable, understand customers pain points, always come with multiple solutions and add value to the business.

Ashwin Tigdoli, Product Director, RMS

The Assignment

RMS commissioned Gauri to undertake a comprehensive review of their Salesforce solution and business processes.

Following a series of workshops with the business stakeholders and a technical evaluation of the systems architecture, we identified key areas where significant improvements could be made to truly leverage the power of Salesforce for Payment services.

Key Improvements Achieved

- **Sales Process Optimisation** and improvements around lead management including:
 - Most recent bought leads imported are now automatically prioritised for the sales team to work on.
 - Leads categorised by business sector for campaign optimisation and generating alerts for the best time to call certain merchants etc.
- **Implemented Opportunity Management** which significantly reduced the time taken for onboarding new customers through process automation:
 - A three-hour manual process for sales reps to administer onboarding procedures for each new customer now only takes them 10 minutes!
 - Clients are now onboarded in 2-3 days, down from 1-3 weeks!
 - The card payment terminal ordering process is automatically triggered.
- **Implementation of Salesforce Case Management** to automate and improve hitherto manual customer support processes.
 - Implemented and optimised First Call Resolution to eliminate duplicate case tickets.
 - Alignment of Case Management processes with FCA compliance requirements and guidelines.

Additionally...


- Added reporting and analytics to better monitor and improve '**First Call Resolution**' and fulfilment of regulatory reporting requirements.
- Made significant improvements in Salesforce codebase for better adherence to **best practices**, reduction in technical debt and improved systems scalability.
- Implemented secure payments through Salesforce integration with **PCI PAL** and NVA Vonage telephony.




The Result

Salesforce user adoption has increased significantly within RMS. This resulted in an immediate increase in sales and customer satisfaction due to significant reductions in onboarding times and faster more efficient fault resolution.

If you are interested in learning more about Gauri's Salesforce solutions for the payment and financial services sector and how they can benefit your business, please get in contact with us.

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About Gauri

Gauri is a Salesforce Crest Partner providing the full portfolio of services including implementation, solution enhancements and managed service support.

We were formed in 2007 with a commitment to provide our clients with unrivalled value and commercial integrity in delivering Salesforce and SAP solutions and associated support.

Visit us on:

www.gauri.com/salesforce