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CUSTOMER-FOCUSED • PERFORMANCE-BASED



The American Diabetes Association leads the fight against the deadly consequences of diabetes and the fight for those affected by diabetes by funding research; delivering services; providing objective and credible information; and advocacy.

“Now our backend fulfillment process is easy to learn, easy to use.”

- Arlene Erskine,
Managing Director,
Center for
Information and
Community Support

CHALLENGE

The support agents at the Center for Information and Community Support (“Center”), the call center of the American Diabetes Association (ADA), provide information on diabetes as well as ADA programs, products and events, to people diagnosed with diabetes, their family members and the professionals who treat them.

In 2014, the Center handled more than 150,000 inquiries — via web chat, phone and email. Given this high volume of inquiries, the Center could no longer trust their legacy system to support their activities. That system had not evolved since its initial implementation in 1993 and lacked basic business process automation. The Center’s backend fulfillment process was very labor intensive and required multiple manual tasks to complete the fulfillment of items. Their outdated and overly customized management system required time-consuming manual searches of their knowledge base and for the contact information of their constituents’ regional ADA offices.

When the system unexpectedly went down for a two-week period, leaving the Center without a back-up, the time had arrived for a new solution that, according to Managing Director Arlene Erskine, could be “adapted to our processes and requirements — and have a back-up in place.” The Center could not afford to be without their case and knowledge management system again.

SOLUTION

After a thorough review of major call center players, American Diabetes Association selected Salesforce.com as its CRM and ACF Solutions as its implementation partner. Over the 20-week project, including extensive requirements gathering, ACF implemented Salesforce Service Cloud and Salesforce Knowledge to create an integrated call center solution that would be responsive across all channels and address the specific business needs of the ADA. ACF Solutions implemented the following functionality as part of the new core solution:

- Implemented and configured Salesforce Service Cloud to track and manage constituent inquiries via phone, email and web chat through contact and case records.
- Implemented and configured Salesforce Knowledge for ADA’s centralized knowledge base on diabetes information, membership, training materials, web links and more, allowing support agents to quickly hone their search through keywords entered in the case subject line, and within the case view.
- Setup email-to-case functionality, allowing agents to respond directly from a case and for constituents to reply.
- Automated the process of importing kit order requests to the Center for fulfillment by the Center’s team.
- Implemented and extended Salesforce Live Agent by creating a pre-chat form with a duplicate checking functionality and a post-chat survey form to capture key constituent information for demographic analysis and improved services.

- Configured a custom solution to match constituents to the appropriate Regional ADA Office based on their zip code. This allowed the call center agent to proactively provide the constituent key event and contact information for their regional office.
- Implemented Conga Composer and Conductor to streamline the order fulfillment and inventory management processes.

RESULTS

Five months post-implementation, the Center for Information and Community Support reports (1) improved productivity where call center agents now have access to and maintain a comprehensive searchable knowledge-base and local ADA offices directory; (2) faster fulfillment of product orders; (3) simplified processes such that any person could now step into the order fulfillment role easily; (4) reduced call-handling time; and (5) the Center has not experienced any downtime since Salesforce was implemented.



About ACF Solutions, An Attain Company

Located in Reston, Va., ACF Solutions, An Attain Company (ACF) is a wholly-owned subsidiary of Attain, LLC, a management, technology and strategy consulting firm. ACF specializes in large-scale, complex implementations of Salesforce solutions for the Higher Education and Nonprofit sectors.



About Attain

Based in McLean, Va., Attain is a leading management, technology and strategy consulting firm comprised of innovative problem solvers who deliver tangible results to address today's complex challenges. Attain's transformative business and IT solutions and services deliver market-leading results to our customers in the government, healthcare, education, and non-profit sectors.

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