

# CALIFORNIA LAW FIRM HIRES DECISIVEDGE'S FIVE9 AND SALESFORCE CONSULTANTS



## INTRODUCTION

A California-based law firm, specializing in residential and commercial property damage claims, faced operational challenges due to broken configurations between Salesforce and Five9.

Despite previous attempts to fix the issues, the firm's leadership went looking for a vendor who works on both platforms and understands the intricacies of how Salesforce and Five9 work together.

## THE CHALLENGE

The law firm struggled with multiple calls being made to the same number, lead duplication, misalignment between call dispositions and lead statuses, and broken lead prioritization processes.

## THE SOLUTION

DecisivEdge Five9 and Salesforce experts worked together to delete, update, and implement new configurations for three primary solutions: lead prioritization, misdials, and lead duplication.

## AT A GLANCE

### THE CHALLENGE

- Duplicate calls being made to the same number
- Lead duplication in Salesforce
- Misalignment between call dispositions and lead statuses
- Broken lead prioritization settings

### THE SOLUTION

DecisivEdge's Five9 and Salesforce experts worked together to:

- Address root integration issues
- Correct lead prioritization, misdials, and lead duplication

### THE RESULT

Post deployment, the law firm reached their call prioritization goals. The firm saw a 537% improvement in time to call, and closed more sales.

## THE SOLUTION

### Lead Prioritization

The DecisivEdge team discovered several issues that were preventing agents from contacting potential leads after the prospect submitted a webform requesting to be contacted.

First, Salesforce was not correctly configured to identify high potential leads. Second, Five9's Dial ASAP function was not setup correctly.

Upon rectifying both issues, the firm experienced the workflow they had envisioned, resulting in a higher rate of closed deals.

### Misdials

The DecisivEdge team also identified the root causes of misdials and formulated a fix by aligning Salesforce lead statuses with the Five9 dialer rules.

In addition, Five9 dispositions were synchronized and updates to Whendu triggers were made, prompting automated lead status updates in Salesforce.

### Lead Duplication

To understand the reason behind duplicate leads, the DecisivEdge team examined the business and technology processes designed to create a lead in Salesforce.

The team uncovered multiple reasons behind the lead duplication issues, devised a plan to fix, and implemented the right set of rules to follow in Salesforce, Five9, and Whendu.

## THE RESULTS

Post deployment, the law firm experienced the call prioritization goals they were looking for, saw a 537% improvement in time to call, and closed more sales.

Given the success of the project, the law firm has requested DecisivEdge to further optimize its call center operations by focusing on improving inbound service levels, increasing contact rates, and implementing a data-driven decision-making process.

### About DecisivEdge

DecisivEdge specializes in Salesforce telephony platform integration, ensuring a smooth and efficient workflow. Our unique approach and expertise set us apart from other service providers in the industry.

Email us at: [Getresults@DecisivEdge.com](mailto:Getresults@DecisivEdge.com) | [www.DecisivEdge.com](http://www.DecisivEdge.com)



## QUANTIFIABLE RESULTS...

# From 24 hours to 90 Seconds

Timely call back from agents  
to priority leads requesting a  
call.

# 537%

Improvement in instant  
callbacks from agents to  
priority clients.



**DECISIVEDGE™**

Collaborate • Break Through