



# HOW ACCESS INFORMATION MANAGEMENT IS BECOMING MORE ACCESSIBLE TO CUSTOMERS

SALESFORCE SERVICE CLOUD  
STREAMLINES EXPERIENCE FOR CLIENTS



## COMPANY OVERVIEW

The fastest growing information management provider, globally Access is dedicated to delivering the best customer experience. Access enables their clients to better manage their information, control their risks and transform their businesses. Access' comprehensive suite of information governance services includes records storage and information management in hard copy and digital formats, cloud-based document management solutions, data protection, secure destruction, scanning and digital document conversion

Since being founded in 2004, Access Information Management has been named an Inc 5000 fastest growing company for 9 years in a row. Operating in over 60 branches, Access Information is a multi-language and currency organization that handles over **1,000+ cases a day** and **5,000+ cases a week** for their **27,500 clients**. Access Information has acquired over **100 different companies** in its quest to become the largest document management services provider in the nation. It is currently second only to Iron Mountain in terms of size and capacity to service it's clients nationwide.



**1,000+**  
cases a day



**5,000+**  
cases a week



**27,500**  
clients



**100**  
different companies



# EXECUTIVE SUMMARY

## Client's Challenge

To centralize services for a consistent and timely experience for clients to efficiently handle a large number of cases per day:

- Streamline case resolution process
- Consolidate cases from each branch into one location



## Ennube's Solution

Deploy Salesforce Service Cloud and centralize workflow by:

- Implementing omnichannel and custom escalation rules to assign cases in the most efficient way possible
- Addressing centralization problems through email-to-case routing that sends cases from separate branches to one common email
- Building custom omni queues page to allow managers quick access to all queues



## Business Impact

- The company can now monitor all cases consistently across branches
- They can manage cases quickly by region as opposed to historically assigning cases individually by branch and has the tools it needs to ensure timely customer service
- It now has very specific routing to ensure a consistent experience for all customers, especially for larger, national clients

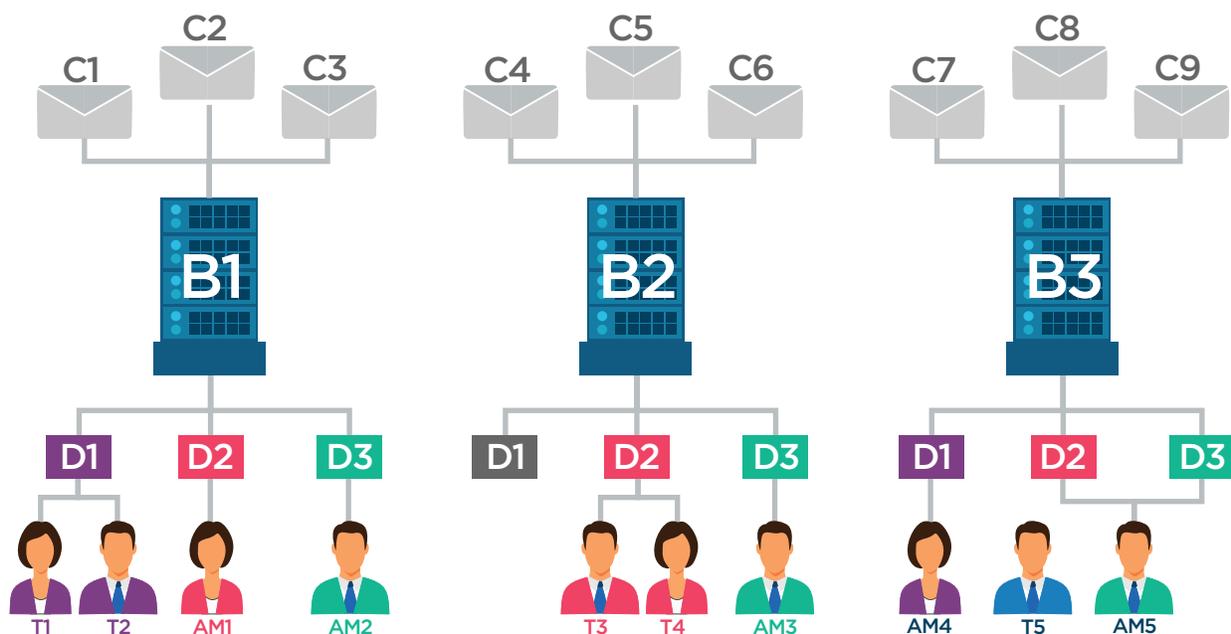


## KEY PROBLEMS (CLIENT CHALLENGE)

As a leading information management company, Access Information was founded around the premise of protecting critical and sensitive information while also making it quick and easy for clients to retrieve their information when they needed it.

The company has always been committed to connecting to their clients and providing customers with a seamless experience. However, with a decade of rapid growth in services and locations and 27,000+ clients, identifying the best way to centralize services while also improving the case resolution process proved to be a challenge.

The biggest challenges for the company stemmed from an deuncentralized service where each branch was handling cases individually. This structure made it difficult to meet client needs efficiently, as they operated in 60 branches and received on average 1,000 cases per day. Overall, Access Information wanted a centralized support system to handle customer information that would address these issues



## ENNUBE'S SOLUTION

The client's perspective was important and we combined their insight with our experienced team of managed service consultants into a unique and extremely customizable solution. With **74 users, 60 branches, and 34 independent email inboxes**, Access Information Management envisioned a centralized and flexible process. In order to address their needs, our deployment of Salesforce Service Cloud for agents included the implementation of automation to route cases to the appropriate queues and omnichannel to route to agents, custom escalation rules and custom routing for each of their three business models.

Our team wrote over 50 escalation rules for client experience managers, with each rule having its own criteria and categories. First, we implemented a basic rule that routed a case to a manager of the account location if it hadn't been worked on within an hour. From there, multiple rules were built for 24-48 hours depending on the type of case or the amount of time it's been inactive. Additional rules were created for 48 hours, 72 hours, and 10 days. Lastly, the final rule would route a case to a VP if a case had not been worked on by a manager.

Ennube then provided support for email-to-case routing. Access Information had 34 separate emails for each branch, leading to each branch working individually on cases. In order to centralize the case process, we implemented email-to-case routing for each branch email so that all cases would be updated into one common email making it easier to assign work within a region.

Managers also wanted a comprehensive view of all cases within their region, so our team created an omni-queue custom page that gave them direct, easy access to all queues within the service cloud console and avoided routing cases to unavailable agents.

Lastly, network security was very important to Access Information due to the information they handle, so Ennube made sure that call center users could not see the work of others, while account managers could see the work of the people they were managing, while client experience managers could see the entire organization within their region.

Company employees appreciated our expertise in Service Cloud implementation and were impressed that we were able to deploy a complete solution with a small team in only 3 months. Additionally, the company received over 6 months of implementation support, additional training for utilizing and updating the new system, and assistance in maintaining the custom routing to make this transition smoother for them.

## IMPACT ON CLIENT'S BUSINESS

The move to Salesforce Service Cloud along with customized solutions uniquely tailored for the company modernized their client experience department and gave them the bandwidth to provide a streamlined, one stop shop experience for larger clients. The uncoordinated, decentralized service that the company was formerly providing has now been replaced, allowing them to be consistent and timely with their case management. Whereas previously the company handled cases individually by branch, now they can manage cases by region, making the case resolution process more efficient and effective, to the delight of national clients. Our implementation support over the next few months after implementation allowed employees to adjust to the new system and helped us further refine customizations to best suit their needs.

