MEKORMA
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MEKORMA
Mekorma is a Microsoft Dynamics GP independent software vendor delivering midmarket payment automation solutions for over 30 years. Their flagship product is Mekorma Payment Hub.

California, USA
www.mekorma.com

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Smooth Fusion design and builds custom websites and software. Smooth Fusion is a trusted partner for Sitefinity CMS and The Portal Connector.

Texas, USA
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MEKORMA CASE STUDY:
Customer Support Web Portal Decreases Service Team's Admin time by 20 hours a week

Mekorma Enterprises, Inc., is a Microsoft Dynamics GP independent software vendor delivering midmarket payment automation solutions for over 30 years. Its flagship product, Mekorma Payment Hub, is the most widely used solution for delivering reliable check printing, secure EFT processing, and outsourced payments for customers in a wide variety of industries.

## RECEIVING AND MANAGING SUPPORT REQUESTS

Mekorma was relying on email to receive support requests from their customers and partners. Support technicians would then manually set up a case in Dynamics 365 and transcribe the content of each email. While this process ensured support case data was tracked and stored in Dynamics 365, the ability of a technician to retrieve this information in a timely manner, while communicating with customers and partners on the phone created many inefficiencies and posed the following challenges:

- **The free form nature of email** provided limited structure to how each technician captured and relayed information within the team and to customers and partners. Technicians relied on the customer or partner to provide the details they thought would be important and relevant, which **created a lot of back and forth to extract the information necessary** to address the issue.

- **Email communications** between technicians and customers and partners on a specific case, **provided limited visibility to all parties**, more so to the end-customer. Often multiple technicians reviewing and assisting with support did not always have the email thread with relevant information for reference.

While having a case management system in Dynamics 365 is valuable, what Mekorma needed was a way to **present the information to all parties in a consolidated and near real-time experience**. They also wanted customers and partners to **access answers to their questions before they submitted a request for support**. These requirements meant moving away from email as the primary communication method.

WEB PORTAL INTEGRATED WITH DYNAMICS 365

After multiple years of research and internal discussions, Mekorma knew they wanted to provide customers and partners with a s**ecure web portal experience that could provide a consistent way to gather and manage support requests**. Mekorma was also looking to position itself for the future as it explores market expansion.

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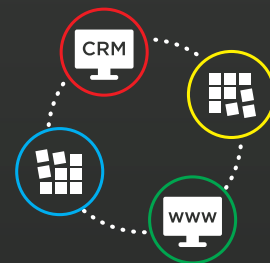
Because the company already made heavy use of **Microsoft Dynamics 365 for all its Sales, Marketing, and Customer Service operations**, Mekorma wanted an integrated web portal solution to manage customer data in a secure online format and provide real-time data integration. The solution also needed to deliver a personalized knowledge experience that could surface answers to common questions as customers entered a support request.

ENTER SMOOTH FUSION

Smooth Fusion designs and builds custom websites and software. **Smooth Fusion is a trusted partner for Sitefinity,** an Enterprise Content Management System with robust customization capabilities, **and for The Portal Connector**, which provides a real-time secure connection to Dynamics 365 customer and knowledge data.
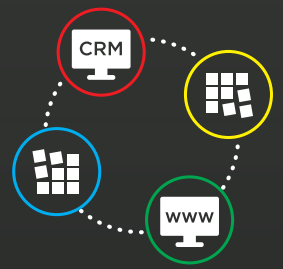
As a delivery partner with The Portal Connector, Smooth Fusion was able to **build the portal solution and integrate it with Microsoft Dynamics 365** to deliver the kind of experience Mekorma wanted for its customers, partners, and technicians.

This solution choice allowed Mekorma to capitalize on the full capabilities of an enterprise CMS to provide an exceptional personalized digital experience to their customers and partners.

Customers and partners now log into a secure portal to request support and follow up on cases. Their request is guided through an online form that ensures the appropriate information is being gathered and captured in the case management system in Dynamics 365. T**his provides Mekorma with a structured mechanism to capture case information, leading up to 80% improvement in case closure rates**.

When customers or partners enter specific information on a case, Mekorma can in turn **deliver targeted self-help knowledgebase articles** and tips to aid in the resolution of a problem.

For support technicians, **the case management information entered in Dynamics 365 is clear and concise**. As cases are effectively moved through the workflow, technicians have visibility into the process and who is contributing to resolving the customers issues.The process has also enabled technicians to identify cases that require escalation to the internal Development and Professional Services teams, **providing customers and partners with the right resources to address their issues**.

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KEY RESULTS

The result is increased customer satisfaction and increased operational efficiency. **Mekorma technicians save a combined average of 20 hours a week in data entry, have increased customer and partner response by 80%, and have improved their ability to communicate case status**. Customers and partners can follow up on cases, get their questions answered in near real-time, have a consistent way to submit a support request with complete information, and avoid unnecessary emails to clarify information.

> **"The self-service model has reduced the number of cases addressed via phone by 40% and increased customer satisfaction, while allowing Mekorma support staff to focus more of its time on educating customers on new product features."**
>
> *Mariano Gomez, Director of Technology, Mekorma.*

Mekorma now experiences less cases overall because customers can potentially resolve their own issues. For cases that do move forward, they gather the full and complete information immediately and avoid unnecessary emails with the customers. Internal staff have greater visibility into the history of the case and the items to be completed to resolve a support request.

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