



CLIENT

# SUCCESS STORY



## Learn how one customer saved time and increased revenue with a self-service customer portal by Pronto

**Note:** due to the confidentiality of our client's business operations in the financial sector, we have omitted their name and any identifying information.

Based in the United States, our client was referred to us because they needed support in selecting and implementing a new website that could also double up as a self-service customer portal.

While this client operates a small business with three employees only, the company has been working with community banks and credit unions for nearly 30 years, providing customized cheque ordering services. Every time one of their customers needs new office supplies or financial products, they contact them to process custom orders.

Today, there are more than 2,000 financial institutions around the world that use their system. Yet, they do not have a dedicated web team, so finding an easy-to-use solution with ongoing support was critical to their ongoing customer operations.



## Why Pronto?

Before working with Pronto, our client conducted an extensive search for a partner who could fit several important criteria. They needed a new website and customer portal that met customer expectations and could be expanded in the future as new technologies became available. They also needed a provider who would be available in the long term for continued maintenance and updates.

They were referred to Pronto Marketing by their IT consulting firm and scheduled a technical consultation to discuss possible solutions.



## The Plan

Based on the needs expressed during this initial consultation, Pronto developed a custom plan to address our client's requirements. The new website and ecommerce ordering platform would consist of:

- ✓ A self-service customer portal that could handle more than 2000 customers simultaneously if needed.
- ✓ Packing list support and management features.
- ✓ Shipping connected to the client's warehouse for every order made via their website.
- ✓ Integration of four individual suppliers to handle drop shipping of orders.

## Our client ultimately partnered with Pronto to implement a four-step solution:

- 1 Concept** – A detailed mockup of the new site experience was prepared and presented for the client to review.
- 2 Development** – The development process focused on identifying the ultimate site structure, mapping the customer journey to improve the user ordering experience, and then integrating vital features identified by the client, including product migration, order management setup, admin workflows, and user management.
- 3 Launch** – The new site was launched, and steps were taken to make it easy for customers to adopt the new portal and start using it seamlessly.
- 4 Post-launch optimization** – After the site's launch, ongoing support would be provided. This included marketing enhancements; support by ticket, chat and phone; support for product price changes, new product additions, and other updates; and ongoing training for store management.

Our client was involved at each step of the process to ensure the final product matched the user experience and feature set they wanted to offer. By walking them through this detailed process, Pronto helped them think differently about their website and make it more customer friendly and easy to use.



## Addressing Challenges in the Project

The project's large scope presented several potential challenges that the client and Pronto worked together to address at each step. These included:

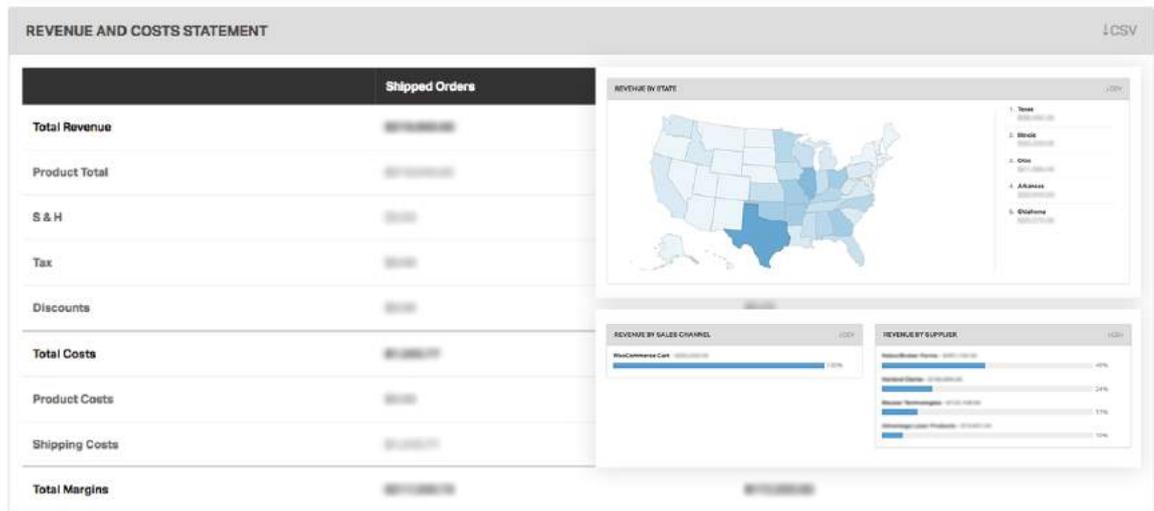
- ✓ **Updating the Login Process** – Passwords needed to be reset and new ways of logging in were adopted for both internal users and customers.
- ✓ **Customer Habits** – With a new user experience and ordering process, customers were required to change their ordering habits, which lead to increased support requests.
- ✓ **Client Team Habits** – The process of managing and updating the website was changed substantially as well, and it required careful training and ongoing support for their team.
- ✓ **Automation with Vendors** – The new system allowed for automation with several different vendors, which required a change in procedure and communications with these vendors.



## Project Results

Because of this project, our client is now confident that their order fulfillment operations can provide quality service for customers. Since customers can now track their order status each step of the way, there are fewer email exchanges, and they enjoy better overall communication. They also have insight into key metrics, including:

- ✓ **Total costs of shipping and handling**
- ✓ **Margins for all orders**
- ✓ **Revenue by supplier**



In the past year, the new customer portal solution has processed more than \$350,000 in revenue and served more than 2,000 customers with 2,800 total orders from 254 products. Thanks to having greatly improved their most critical workflows for both customers and internal operations, they're now able to make more strategic plans.

## Next Steps to save more time on order operations

In the future, our client plans to implement shipping calculation through UPS to provide accurate rates and reduce admin time in order processing. They also plan to implement label printing with Orodoro to improve process efficiency and will link their system to Quickbooks to automate the accounting reconciliation process. Pronto will work to support these integrations and updates to keep the site as up to date and user-friendly as possible.



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