

UNBLU CASE STUDIES

# Creating robust digital channels for an efficient, white glove service

unblu

carta



## Context

Listed by Forbes in the Fintech 50 2023, Carta is a pioneering technology company that specializes in equity management – a complex topic that requires frequent, high-touch customer support. A few years ago, Carta's growth and breadth of products rapidly expanded, two key problems surfaced impacting the Support team's ability to scale.

1. Customers didn't have a means of self-help other than searching a knowledge base, and
2. Due to the complex nature of equity and Carta's growing breadth of features, the chat support channel consistently had the highest handle time and lowest average CSAT across all support channels. As a result, Carta temporarily shut down chat until they could address the root cause of the problem.

## Goals



**Decrease Average Handling Time for text inquiries**



**Enable Support Analysts to educate clients remotely**



**Boost client satisfaction**

## Results



**74%**

Self-Service Resolution Rate



**12% vs 104%**

annual case growth vs annual customer logo growth over the past 3 yrs, while supporting a continuous stream of new and improved product features



**+10pt**

on Avg CSAT improvement from 84% to 94% on interactions which originated in Chat

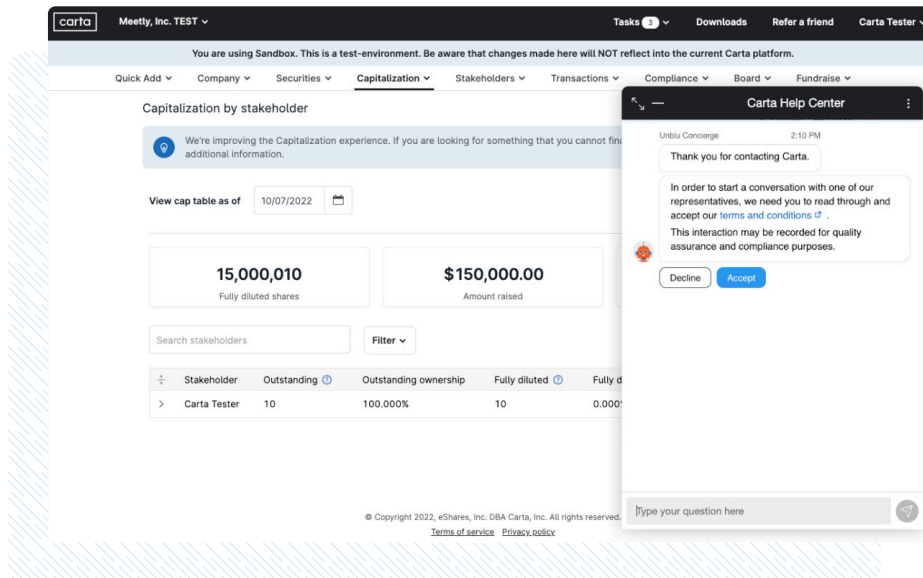
## SOLUTION

To address these issues, Carta implemented a three-fold strategy:

1. Develop outstanding educators among their support staff by giving them collaboration tools to educate clients on-screen, in real-time.
2. Empower Support Analysts to proactively identify

and resolve adjacent issues, while resolving the primary issue. The goal being to improve customer happiness by avoiding the need to contact support beyond the first inquiry.

3. Automate a majority of inquiries by implementing a robust self-help workflow.



Carta implemented PIN-based Co-Browsing as well as Live Chat and Embedded Co-Browsing to help Carta's Support Analysts guide clients through the Carta application with visual support.

By empowering Support Analysts to educate their clients on using the service, Carta is aiming to see a notable reduction in the number of clients who return with queries at a later stage.

*“We realized we had to do more real-time coaching so our users would understand how to take full advantage of our platform (...) Having that ability – as opposed to doing it on their behalf – is really empowering our customers to be more effective users of our products. With a robust self-help capability enabling Support*

*Analysts to work on more complex issues, we now worry less about handle time; instead focusing on providing more proactive service beyond the primary issues. We’ve found that investing a bit more handle time on a single interaction can pay significant dividends in customer happiness and long-term team-level productivity.”*



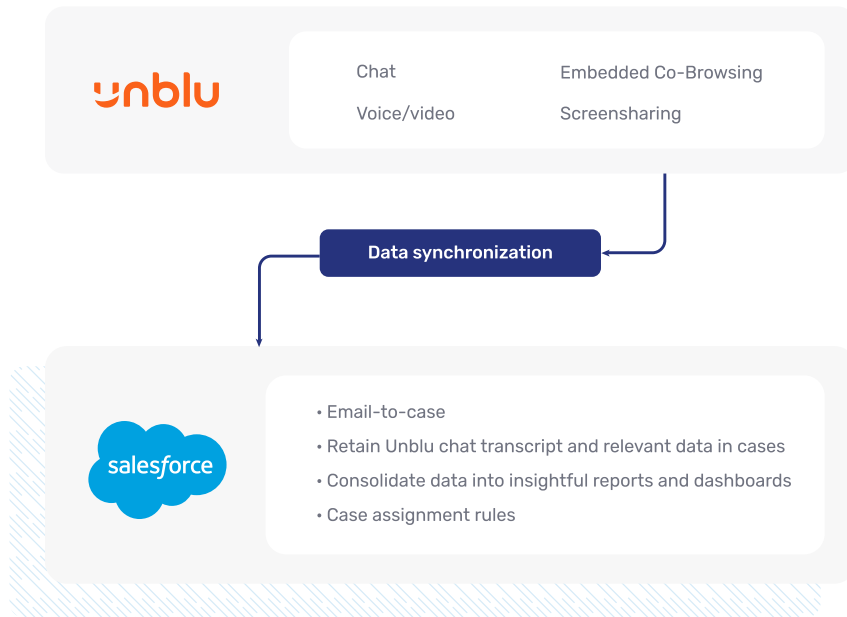
Dave DeMarco  
VP Delivery & Business Systems at Carta

## NUMBERS MATTER

Tracking metrics and client satisfaction

### Centralized customer data with Unblu and Salesforce integration

Records of client communication created on Unblu channels can be stored on Salesforce, alongside other channels such as emails and phone conversations.



### Keeping track of client preferences

Carta conducted a customer survey to better understand the value generated from new channels and means of collaboration, including Live Chat, Voice, and Video & Voice. Furthermore, the Unblu and Salesforce integration allows Carta to capture relevant conversation metadata (call duration, etc.) Using this, Carta can build detailed analytics on the

company's client service performance. They found that 55% of surveyed customers showed preference for one of the channels provided by Unblu. What's more, 84% said they preferred using Co-Browsing (sharing their screen with support staff) over other means of issue resolution.

55%

Preferred one of the channels provided by Unblu.

84%

Preferred Co-Browsing over other means of issue resolution.

★ 4.7/5

Average Client Satisfaction during an Unblu session.

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documents, and use cases about our features and solutions.

If you have any questions, please email us at [sales@unblu.com](mailto:sales@unblu.com)

