

# 2. Desks: Use Cases

## **Use Case #1: Managing Offices in Different Countries**

Desks can be used to manage various offices across different locations or cities within the same country. For example, you can create separate desks for your offices in different cities or regions. If needed, you can isolate clients and ensure that employees from one office only see and interact with their local clients.

## **Use Case #2: Managing Different Departments**

Desks can help streamline client workflows across multiple departments. For instance, a client can first be assigned to the Sales department (Desk), and once the sale is complete, the client can be transferred to the Retention or Analytics department. This helps ensure that each department has clear visibility into the clients they are responsible for at any given stage.

## **Use Case #3: Lead Segmentation by Source**

If you have multiple sales channels, such as social media, website leads, and ads, you can use desks to segment clients based on their source. You can create separate desks for each channel, ensuring that clients are categorized accordingly. This process can also be automated through API integration, making lead segmentation more efficient and less prone to errors.

## **Use Case #4: Product or Service Lines**

If your company sells multiple product lines (e.g., “Corporate Loans,” “Retail Banking,” “Wealth Management”), spin up a Desk for each. Product-specific teams only see those clients and documents—preventing mix-ups and ensuring tailored service.

## **Use Case #5: Seasonal or Promotional Campaigns**

For time-bound initiatives (e.g., “Holiday Promo Q4,” “Summer Flash Sale”), create temporary desks. Staff can be assigned to these desks for the campaign’s duration, then archived or deleted once complete, keeping your core desks clean.

## **Use Case #6: Multi-Channel Support**

Separate desks by support channel: “Email Support,” “Phone Support,” “Live Chat.” Assign different SLAs, notification rules, and managers to each desk to align with channel-specific workflows and tooling.

## **Use Case #7: Pilot & QA Environments**

Mirror your live environment under a “Staging” desk. QA engineers can import dummy clients, test new automations, and run calls without affecting production data. Once tested, you delete or reset the staging desk.

### **Use Case #8: Partner Onboarding & Sandboxes**

Create desks like “Partner API Sandbox” or “Integration Pilot.” Issue limited-scope API tokens and access for external partners; they can only operate within that desk and never touch your real customer data.

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