

# Empowering efficient customer support with Agentforce to speed up case resolution

## Challenge

The customer, a mid-sized IT company based in the APAC region with about 4,000 employees, sought to improve efficiency, scalability, and speed to market through product and technology enhancements. They aimed to enhance service channels and extend self-service to social media using a GenAI chatbot for quick, conversational responses. Using a mix of commercial and custom-built LLMs for generative service, a key challenge was thoroughly evaluating available LLM technology before beginning the build.

## Solution

Customer partnered with Slalom and Salesforce to implement a GenAI solution integrated into their Salesforce environment. The system, connected to Facebook Messenger, ensures a consistent experience with Salesforce's Digital Engagement and Einstein bot for immediate, contextual answers. Powered by Einstein NLP, the chatbot integrates with Facebook and Coveo for customer-specific information. Coveo Gen AI delivers content from knowledge articles and website content and Service Cloud creates cases from bot conversations, efficiently addressing requests. This solution enhanced their digital-first, content-led customer support.



"We've combined Salesforce technology with Slalom's Generative AI expertise to create a solution that streamlines operations and enhances the customer experience, providing quality answers, guidance, and insights for success." - Nick Walton, Managing Director, Slalom



slalom

salesforce

30%

Reduced issues  
requiring specialist  
support

75%

of messages handled by the  
customer support social  
media team eliminated

80%

decrease in time spent  
monitoring the Facebook  
Messenger social media  
channel

### Navigator Expert:

Customer 360 & Experience Cloud

### Level 2 Specialist:

Service Cloud

### Level 1 Specialist:

Einstein & Data Cloud

Products

Service  
Cloud

Agentforce

Salesforce Digital  
Engagement

# Reducing human intervention and long resolution times to deliver 'best-in-class support' with Agentforce Service Agent

## Challenge

A leading smart home company based in the United States faced challenges in managing complex troubleshooting processes involving multiple technologies, leading to lengthy resolution times and high human intervention. They sought to improve efficiency and provide a differentiated, innovative service experience. Their goal was to minimize repeat customer interactions with the contact center while delivering best-in-class support.

## Solution

NeuraFlash and Salesforce collaborated to implement Agentforce Service Agent for the customer, significantly reducing the need for human intervention and streamlining troubleshooting processes, which improved response times. A custom Agent Assist widget, built by NeuraFlash and integrated into the service console, helped agents deliver more empathetic and effective responses by providing real-time information and suggestions. NeuraFlash went beyond a basic bot by integrating AI into daily workflows, transforming the customer service experience and expediting self-service benefits. These innovations resulted in faster, more accurate responses, ultimately enhancing the overall customer service experience for the customer.



“Our customer is committed to revolutionizing their already excellent customer service over the next 3 years by partnering with NeuraFlash to implement an Agentic front door to their services. Powered by Agentforce, we are supporting them with micro-releases, introducing their digital workforce one agent and use case at a time.” - Tom Hebner, VP of Agentforce, NeuraFlash



# Helping the customer go from 'test and learn' to using Agentforce to accelerate banker efficiency

## Challenge

A mid-sized, U.S.-based financial services customer lacked internal expertise around GenAI and relied on manual, time-consuming tear sheets to engage with clients; interested in Agentforce, but uncertain where and how to begin.

## Solution

Atrium started by running a "test and learn" phase to explore possibilities and demonstrate the technology. They then implemented Prompt Builder, allowing bankers to easily access all active engagement details for quick review. Atrium also developed a prompt template to gather essential engagement data and automatically generate detailed summaries in under 30 seconds. These summaries, which include all key information typically found in a tear sheet, streamline the process and ensure data accuracy, saving bankers significant time and effort.



"As AI experts at the forefront of Agentforce, we delivered a solution that saves bankers thousands of hours a year in efficiency gains. It provides an intuitive experience for them to better understand their clients and nurture relationships." - Laura Koch, Financial Services Practices Lead, Atrium



Einstein | Prompt Builder



Agentforce | Agent Builder



**4800**

Hours of banker time saved per year

**20**

Minute reduction in estimated preparation time for company meetings

**3-5**

Minute reduction in time handling My Engagements

**10**

Assumed weekly client meetings (for which bankers need to prepare)

**30**

Assumed number of bankers handling meetings (58 weeks per year)

**Navigator Expert:**

Einstein & Tableau

**Level 1 Specialist:**

Einstein Gen AI

# Converting 'missed opportunities' into tailored engagement and optimized workflows with Einstein for Sales

## Challenge

A virtual K-12 institution recently launched a staff initiative to improve efficiency and customer service. However, their lead conversion rate remains low at just 8%, primarily because the intake team, composed of service department staff, lacks the training and focus needed for effective sales. This has led to low first-call effectiveness, resulting in missed opportunities for 92% of potential leads.

## Solution

Coastal partnered with customer to implement innovative solutions using AI-driven technology. Salesforce's Einstein for Sales transformed the customer's communication strategies by analyzing data to deliver personalized content, such as success stories, tailored to their audience. Coastal also leveraged Zoom transcripts to track keywords, enabling the creation of precise email prompts that improved efficiency and correspondence. These advancements enhanced the customer's engagement and streamlined their communication processes.



"The customer launched an initiative to improve efficiency but faced challenges with lead conversion and sales. Coastal supported the customer in reframing their approach, demonstrating how Einstein for Sales could leverage customer data to generate personalized content. This gave the customer the confidence to pilot AI solutions and transform their communication strategies."- Sam Taylor, Director of Innovation and Emerging Technologies, Coastal

Products



Einstein for Sales



Sales Cloud



Service Cloud

**\$59K** ACV, Einstein GPT

### Region

AMER

### Industry

Professional Services, Education

### Role of Partner in Customer Lifecycle Stage

Joint deal

### Navigator Expert:

Customer 360 Platform, Data Cloud,  
Education Solutions, Sales Cloud, Service  
Cloud

### Level 2 Specialist:

Einstein

### Level 1 Specialist:

Einstein Gen AI

#WinningWithPartners