



Service Cloud Case Study

Pratik Mistry

Pratik.mistry@railbotsolutions.com

<https://railbotsolutions.com>

<https://YourSalesforceBuddy.com>

Warranty Case Management: Service Cloud HVAC Equipment Maintenance Business



Objective

To implement a comprehensive case management tool on Service Cloud to handle warranty claims, catering to multiple teams and regions. The solution aimed to streamline case creation, assignment, & notification processes, ensuring timely resolutions and enhancing customer satisfaction.



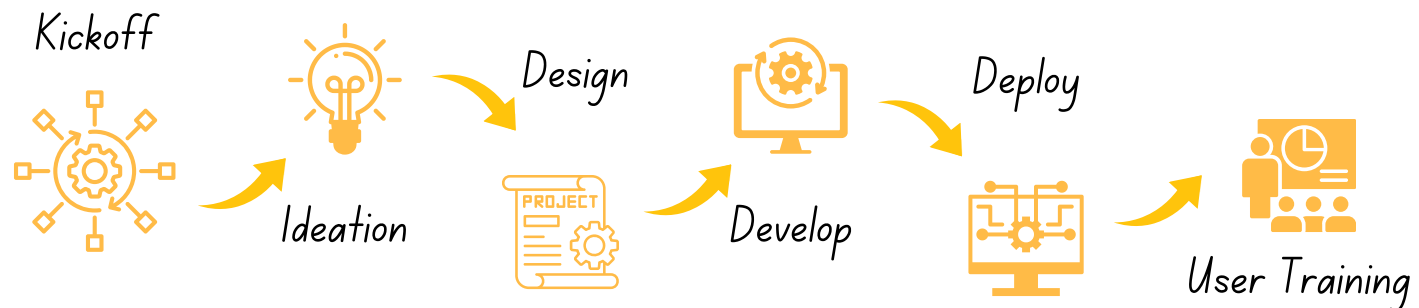
Problems Reported

- Existing manual processes for managing warranty claims.
- Lack of automation led to delays in case resolution.
- Difficulty in managing cases across multiple regions.
- Inadequate communication with customers



Goals to Achieve

- Establish a robust system to manage warranty claims with clear workflows and automated processes.
- Develop flows to automatically assign cases based on the region and team specifications.
- Implement flows to send email notifications to customers upon case creation, including case details in PDF format.
- Ensure automated workflows for issuing credits to customers post case resolution.
- Create flows to notify high-level managers about cases not closed within 30, 60, and 90 days.



Achievements and Key Results

- Efficient Case Management: Successfully set up a case management system that handles warranty claims effectively, reducing manual intervention and errors.
- Automated Case Assignments: Implemented flows that automatically assign cases to the relevant teams based on region, ensuring quicker response times.
- Enhanced Customer Communication: Developed workflows to send detailed case information in PDF format to customers via email upon case creation, improving transparency.
- Automated Credit Issuance: Established automated processes to issue credits to customers, enhancing customer satisfaction.
- Proactive Escalation Management: Created notification flows for managers to be alerted about pending cases, ensuring timely follow-up and resolution.



Conclusion

- The implementation of the case management project on Salesforce Service Cloud by RailBot Solutions significantly improved the handling of warranty claims for our client. By automating various processes and ensuring efficient case assignments and notifications, we achieved enhanced operational efficiency, better customer communication, and proactive management of unresolved cases. The project not only met but exceeded the client's expectations, demonstrating the power and flexibility of Salesforce Service Cloud in managing complex case workflows across multiple teams and regions.