

Streamlining Customer Invitations: Empowering CSRs with Automated and Scalable Outreach

Introduction

To enhance customer engagement and streamline outreach, the organization aimed to empower Customer Service Representatives (CSRs) with tools to manually and automatically invite customers during key interactions such as quote and order processing. The goal was to maintain consistent brand communication, support bulk invitation capabilities, and ensure robust tracking for audit and reporting. Through a combination of automation, user-friendly interfaces, and standardized templates, the solution delivered measurable operational efficiency and improved customer experience.

Client Overview

Industry: Utility and Waste Management

Salesforce Products Used

Salesforce
Sales Cloud

Apex

Flows (Record-
Triggered &
Scheduled)

Lightning
Email
Templates

Custom
Metadata

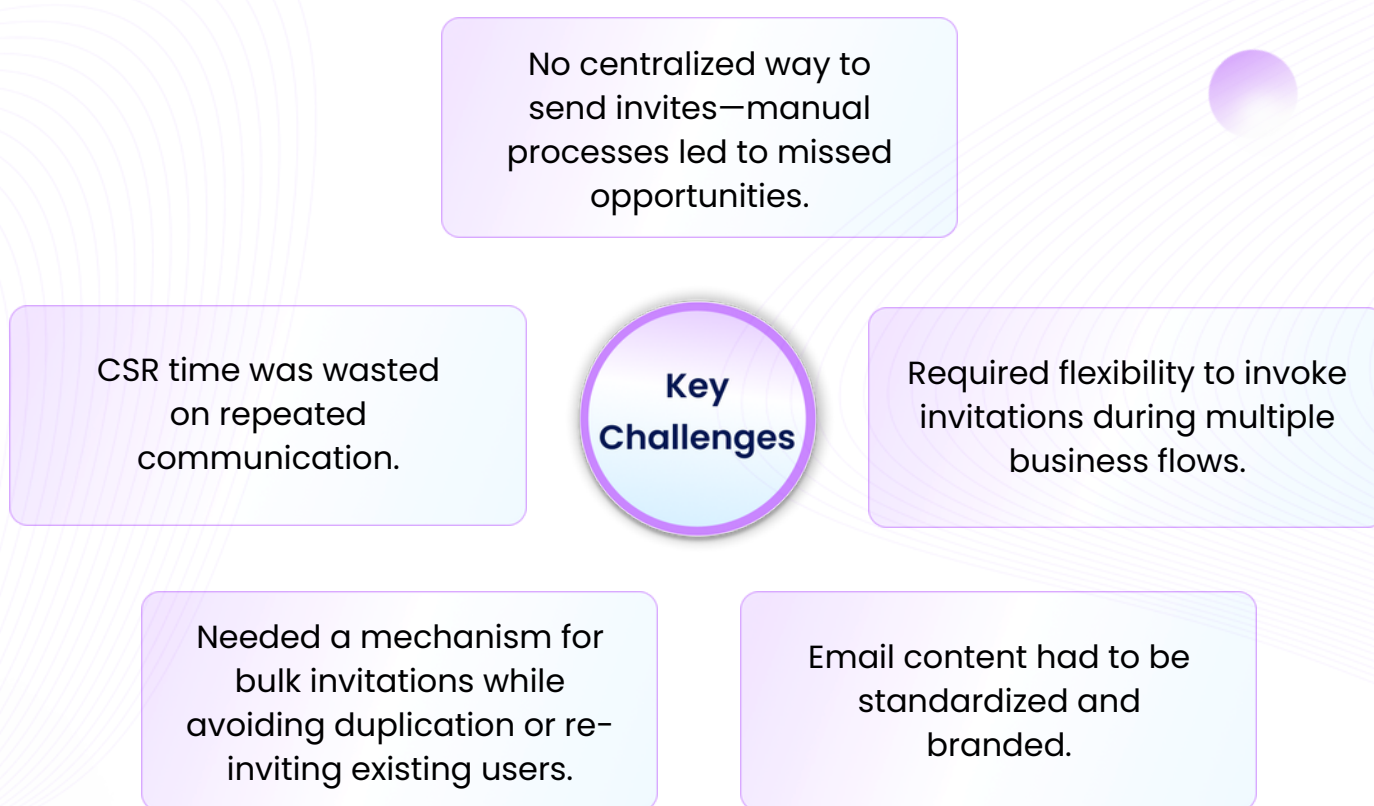
Batch
Apex

Business Requirements

Client needed to enable customer service representatives (CSRs) to **invite existing customers** to use the MyUSS portal for online account management. Specifically, the invitation process should be:

- **Available on-demand** for CSRs to manually invite contacts.
- **Triggerable during the “Path to Order”**, such as by checking a box during the Quote or Order process.
- **Scalable for bulk processing**, allowing mass invitations to customers in batch mode.

Challenges Faced



Solution Architecture

To enable both manual and automated customer invitations while ensuring a smooth experience for CSRs, a structured and scalable solution was implemented with the following key components:

Centralized Invitation Logic

- A standardized process was created to manage customer invitations. This ensured the customer was eligible, hadn't been invited already, and received a personalized email using a pre-defined template.

Automated Invitation from Quote/Order

- A simple checkbox was added to the Quote and Order records. When selected, it automatically triggered the invitation process, fitting naturally into the CSR's workflow without any extra steps.

Manual Flow for CSRs

- Customer Service Representatives could also invite customers directly from the Contact record using an intuitive screen flow. It guided them through the process, validated inputs, and allowed re-sending of invitations if needed.

Bulk Invitation Capability

- A backend process was created to handle large-scale invitations. It could be scheduled or run on demand, and included filters to avoid sending duplicate or unnecessary invites.

Branded Email Template

- A professionally designed email template was used to ensure consistent, on-brand communication. It included a personalized greeting, invitation link, and relevant support details.

Logging and Reporting

- Every invitation was tracked using a dedicated log. It recorded key details such as who initiated the invite, when it was sent, and the outcome—providing a solid foundation for audits and dashboards.

Business Outcome

Objectives

Enable CSRs to invite customers manually
Invite during Quote/Order process
Bulk invite multiple customers
Maintain consistent email communication
Ensure accurate tracking and reporting

Achieved Results

Flow with CSR-friendly interface on Contact record
Auto-trigger via checkbox, no manual steps needed
Scheduled batch process with filtering
Standardized branded email template
Logging for audit, dashboard-ready data model



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Certifications

