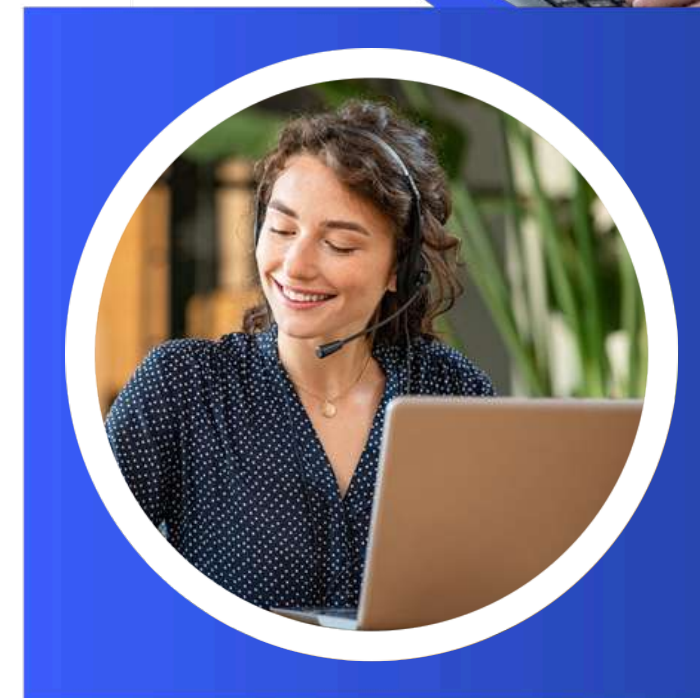




CONNECTED CUSTOMER SUPPORT TRANSFORMATION WITH SERVICE CLOUD

Enabling intelligent, scalable and Customer-Centric
service operations through Salesforce-Powered
digital transformation



ABOUT THE ORGANIZATION



- **Mission / Focus Area:** An organization dedicated to delivering consistent, high-quality customer support, ensuring timely issue resolution and fostering long-term customer satisfaction across every service interaction.
- **Size of Organization:** Mid-scale organization with 10000+ customers, 300+ service agents and global support operations across multiple time zones.
- **Key Programs:** Customer support operations, technical support, complaint management, SLA-based service delivery, field service coordination and customer experience management.
- **Tech Stack Before Salesforce:** Legacy ticketing systems, emails, spreadsheets and disconnected telephony platforms leading to siloed data, inconsistent service experiences and operational inefficiencies.

CHALLENGES

- **Disjointed Customer Interactions:** Multiple communication channels (email, phone, chat) were not integrated, leading to inconsistent customer experiences.
- **Inefficient Case Handling:** Manual case logging, assignment and tracking caused delays and increased resolution time.
- **Lack of Intelligent Routing:** No skill-based or priority-based routing, resulting in improper case allocation.
- **Poor SLA Compliance:** Absence of structured entitlement processes led to missed SLAs & escalations.

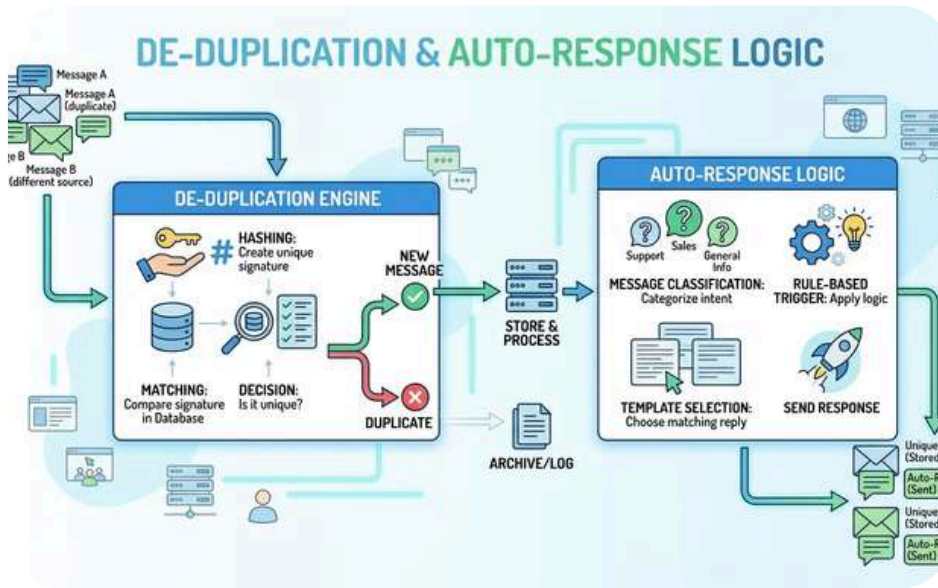


IMPLEMENTED SOLUTION



Centralized Case Intake

Enabled Email-to-Case, Web-to-Case, chat and CTI integration for unified and standardized case management.



De-Duplication & Auto-Response Logic

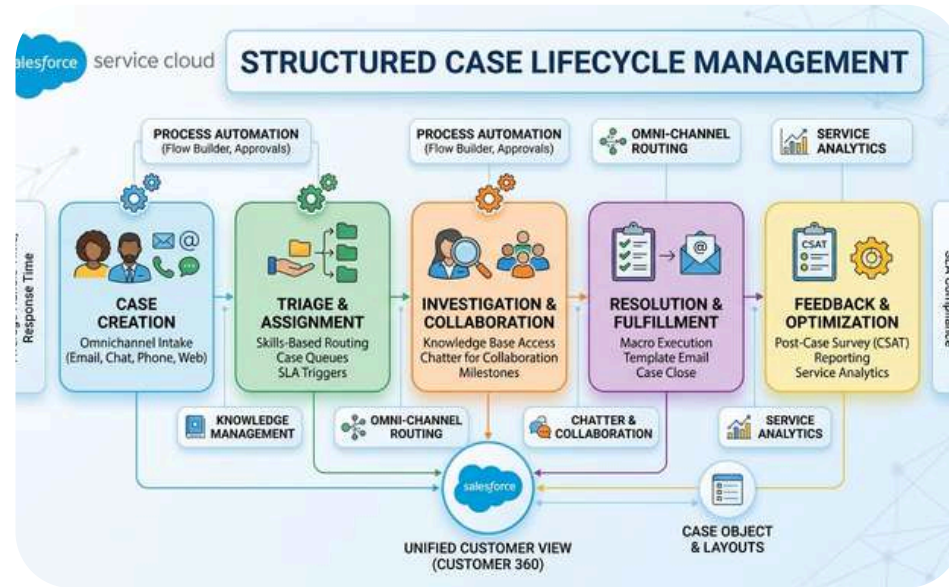
Implemented duplicate detection and automated client acknowledgment.



Intelligent Omnichannel Routing

Enabled smart omnichannel case distribution based on agent expertise, case urgency and workload availability to improve response efficiency.

IMPLEMENTED SOLUTION



Structured Case Lifecycle Management

Implemented automated case lifecycle management with assignment, escalation, validation and status tracking rules.



Agent Productivity Enhancement

Streamlined agent operations using macros, guided flows and quick text for faster and standardized case resolution.



Knowledge Management Optimization

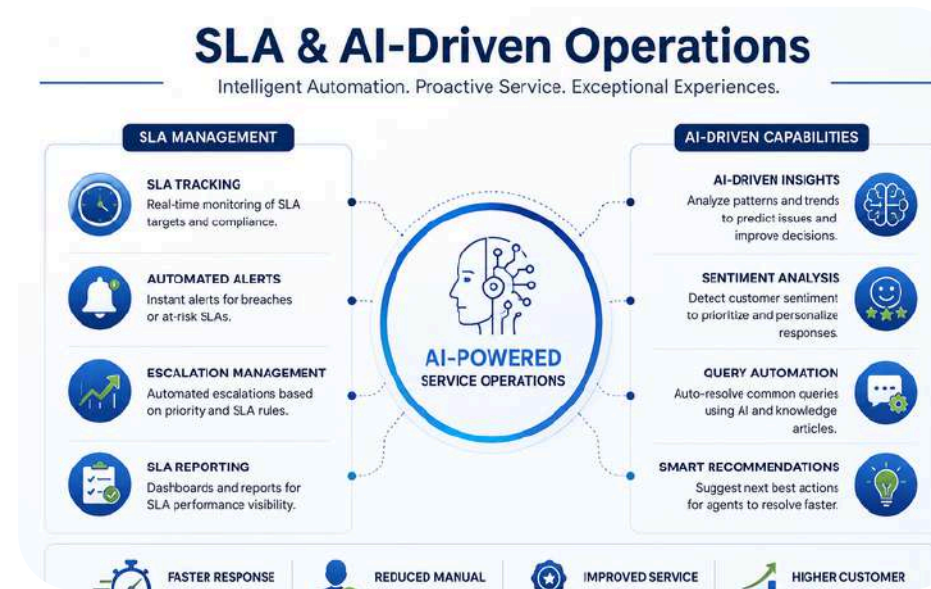
Enabled structured knowledge management with searchable articles, approval workflows, version control and visibility management.

IMPLEMENTED SOLUTION



Service Visibility & Governance

Built real-time dashboards, tracked KPIs and enforced data quality with standardized inputs and access controls.



SLA & AI-Driven Operations

Implemented SLA automation and AI-driven insights to improve response time and service efficiency.



Continuous Improvement & Self-Service

Established feedback loops and enabled customer portal with real-time updates and case deflection.

IMPLEMENTATION APPROACH



Discovery & Requirement Analysis

Gathered service management requirements, analyzed support workflows and identified automation and customer engagement needs.



Solution Design & Service Cloud Implementation

Designed scalable case management workflows, routing models, SLA processes and service automation capabilities.



Channel & System Integration

Integrated email, chat and CTI for unified customer interactions and real-time communication.



Data Migration & Validation

Migrated customer, case, and service-related data with validation to ensure accuracy and consistency.



Testing & Quality Assurance

Conducted functional testing and UAT to validate workflows, routing logic, SLAs and integrations.



User Training & Go-Live

Delivered user training, deployment support and post-go-live assistance to ensure smooth adoption and operations.

KEY FEATURES DELIVERED



- **Unified Customer View:** Centralized customer data, interaction history and case details for improved service context.
- **Automated Case Management:** Auto case creation, intelligent routing and escalation workflows to streamline operations.
- **Omnichannel Support:** Integrated communication channels (email, chat, phone) for consistent customer engagement.
- **SLA & Milestone Tracking:** Case defined service levels with automated alerts and escalations to ensure compliance.
- **Knowledge Base Implementation:** Self-service portal and internal knowledge articles to improve resolution speed and reduce case volume.
- **Real-Time Dashboards:** Comprehensive reporting on case metrics, agent productivity and customer satisfaction.

RESULTS

- **Unified Customer View:** Centralized customer data and interactions, improving service context and boosting satisfaction by 25%.
- **Automated Case Management:** Enabled auto case creation, routing and escalations, reducing manual effort and resolution time by 30%.
- **Omnichannel Support:** Integrated email, chat and phone channels, ensuring consistent engagement and improving response efficiency by 20%.
- **SLA & Milestone Tracking:** Implemented SLA monitoring with automated alerts, reducing breaches by 40% and improving compliance.
- **Self-Service & Reporting Optimization:** Deployed knowledge base and real-time dashboards, cutting case volume by 20% and increasing agent productivity by 35%.





CONTACT US

Interested in transforming your customer service operations with Salesforce? Let's connect!



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