



Cloudualyze

Salesforce.com Journey? Let us be your guide...



salesforce

service cloud

HOW TO MAKE YOUR CUSTOMER SUPPORT AGENTS MORE PRODUCTIVE BY USING FEATURES OF SERVICE CLOUD

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Introduction:

Salesforce Service Cloud will help you in delivering intelligent and personalized support across the globe, no matter where you are based.

Through Service Cloud, you can offer support to your customers through their preferred channel via email, mobile and chat options of their choice via LiveMessage. You get access to improved support through AI (Artificial Intelligence), deliver better information about customers to agents, and get a 360-degree view of performance with dashboards and receive updated recommendations with Salesforce Einstein Analytics.

You can maximize your agent productivity and improve customer satisfaction rates through a platform which gives all the data you need related to a case including your legacy data, from any section, all of it in one implemented CRM solution. You can also fix your on-field operations through a mobile application enabled with Einstein AI to make sure technical people have all the tools they require in doing their work accurately.

You also get access to a community portal, wherein your customers can connect with other industry experts where helpful and knowledgeable information can be shared.



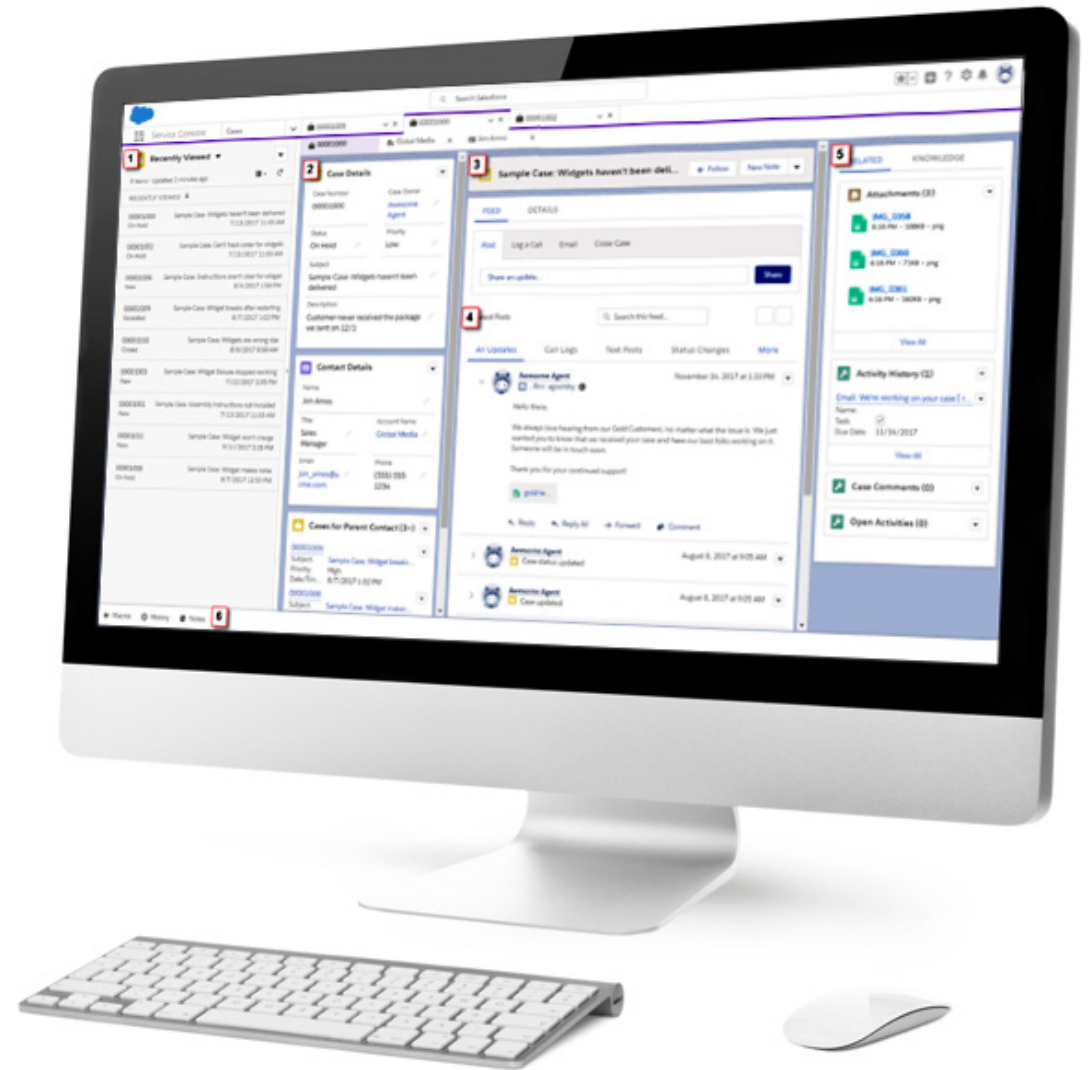
Let us go through the Service Cloud features that make customer support agents more productive:

Feature 1

Lightning Service Console

Find all the data you require displayed under one console

Lightning Service Console lets agents everywhere deliver fast & personalized customer service than ever before. You can use it to bring cases across all channels, phone, email, social channels, and even connected devices into a single place. You can write top priority cases to your agents via its smart features ensure your most important cases are resolved right away. Agents get a complete view of the customer that they can configure with all the relevant information, so they track down upcoming milestones for service level agreements. With the console's responsive design and keyboard shortcuts, your agents will have the access to a seamless experience without scrolling or clicking in multiple places. The collapsible case for you provides a concise case history overview. You can also drill into the details of a particular issue, without having to jump tab-to-tab. With knowledge, agents can quickly right answers to customer queries and use experts and topics to tap into the resources that they need to resolve every case, every time! Macros reduce repetitive actions associated with frequently asked questions to a single click. You can also publish your actions like your agent's complete tasks, like sending a follow-up email or scheduling an onsite appointment, without it revealing the case.

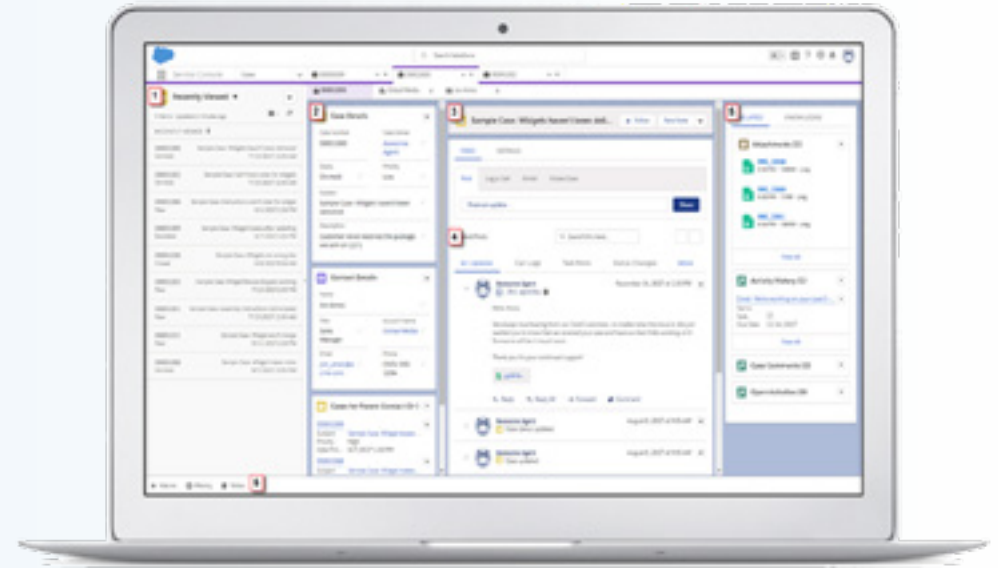


Feature 2

Case Management

With the help of Case Management, you can streamline your pipeline for improved customer service, resolve customer queries faster- no matter where you are based. Your agents will always be connected to all the data & tasks they require via Service Cloud.

It gives you an advanced AI powered platform that better empowers managers, to better empower agents, to better connect with customers, anytime, anywhere, through any device. You can now find solutions faster, even before the customer knows there's an issue, using the advanced algorithm of productivity + efficiency x (into times) infinity. With the solution includes more productive agents, more efficient costs, and more satisfied customers. Service Cloud case management is a platform that unlocks legacy customer data, aligning service, sales and marketing with a 360-degree view of each customer. So, everyone is in the know, knowing more about the customer, than the customer may actually know, which for customer success is good to know.



Service Cloud case management is a platform that scales with you, providing customers with consistent and convenient omni channel experience across every channel. You can always track your social, web, text, email, calls, products, self-service portals and communities via Service Cloud. Like your customers, you can quickly adapt to change, keeping your business agile to customer service needs. Your field agents are also in the loop, even while they are driving the loop! You can also integrate with any back-end system and customize any service process with local tools like lightning and process builder, and you can quickly plug in thousands of trusted pre-build service apps on the Salesforce AppExchange, all while receiving all the latest tools and innovations, three times a year, built on the trusted and secure Salesforce platform, to help keep your agents & customers happier at every step.



Feature 3

Knowledge Database for Clients

Knowledge will help you in driving quick resolutions and extraordinary customer service. Let us go through how knowledge database helps agents in answering client queries speedily and in an improved way:

Boost Agent Productivity

If your knowledge base is placed accurately in the console, agents can provide correct answers to clients without any difficulty.

Develop Seamless Customer Experience

Your knowledge database will be integrated with your company website, reliable customer portals, public websites, and public client communities. Develop a seamless customer experience via any device.

Streamline your Knowledge Management Procedure

Make sure to utilize key business practices and secure the correctness of the articles via early KCSv5 validated knowledge management & incident management solution.

Feature 4

Service Procedure and Automation

Utilize your time efficiently which you spend with your clients via Workflows & Approvals. You can eventually save time via automated procedures which comprise of approved actions necessary to keep things moving.

Boost Agent Productivity via Automated Workflows

Remove manual and repetitive chores via automated manual tasks. Workflow boosts up your work pace by automated email reverts, field updates, and assignments.

Develop a Procedure with Drag & Drop Accessibility

Build a complete procedure in one central location via Process Builder, an interface which is used to develop and save records, log calls, send emails, initiate workflows, and many more.

Cases should Keep Moving by Making Approvals Easier

Get your business request approval procedures automated by identifying a series of steps that are considered to accept a record, which comprises of whom you should ask, and what to do at every point of the procedure.



Feature 5

Omni-Channel Routing

With the help of Omni-Channel Routing you can manage availabilities efficiently, transparently and in a faster way in real-time basis. You can cleverly route the accurate cases to the appropriate agents.

Route work Cleverly

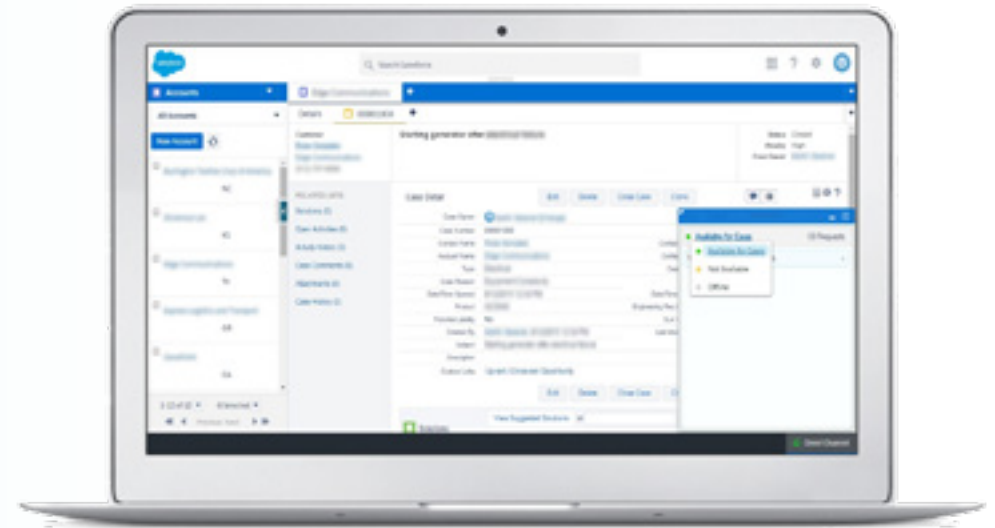
You can route cases, leads, and other work, to the right agent directly automatically. Managers can now configure Service Cloud to distribute work to the appropriate agent depending on his skillset, availability and potential of grasping work load. Your agents can now update their status in a real-time basis, making sure your high priority tasks receive instant action.

Boost your Productivity

Omni-Channel Routing will automatically choose work available in the queues and will cleverly route work according to the business requirements. Work is provided to agents in a real-time basis which provides an in-context view of the client throughout every channel. You can stay rest assured that your agents will prioritize work accurately with the capability to define relative priority and depth of the work.

Acquire Operational Insights

Get visibility about how your agents handle their work, and the amount of time they spend in particular statuses, and about the ratio of accepting & declining of workflow. Additionally, you can report on approximate wait times, approximate case handling time, and service level agreement adherence. With the help of these insights you can leverage these analytics to respond and fix your problems in a quicker way.



Feature 6

Service Analytics

Einstein Discovery

You can now acquire key business insights about your business – including the complete live working status about it via Einstein Discovery that analyzes millions of information compounds in just a few minutes. It will help you in recognizing data patterns and the current trends.

Get Smooth Integration

Make your agents make accurate decisions by integrating your Lightning Service Console dashboards with Service Cloud Information. Boost up with speedy ROI, with the current pace, scale & security you're already getting from Salesforce.

Consolidate your KPIs

Provide customized service via CSAT depending on your existing Salesforce information & trends. Your agents can stay updated about your business requirements via recognizing product & client issues and avoid risks through via accurate insights. Your sales representatives can solve and fix problems faster via accurate case fields & ideas for the next activities.

React Immediately

You can now solve problems in a faster way via Service Analytics. Your agents and managers can now open and close cases from insights, build tasks, update tasks, and coordinate on any gadget, without being disconnected from any analytical tools.

Feature 7

Telephony Integration

Know who's calling you!

Get to know all the information related to the customer even before you pick up the phone. Get all the necessary information or the call record you need to know via being displayed on your screen.

Call your customers with a single click!

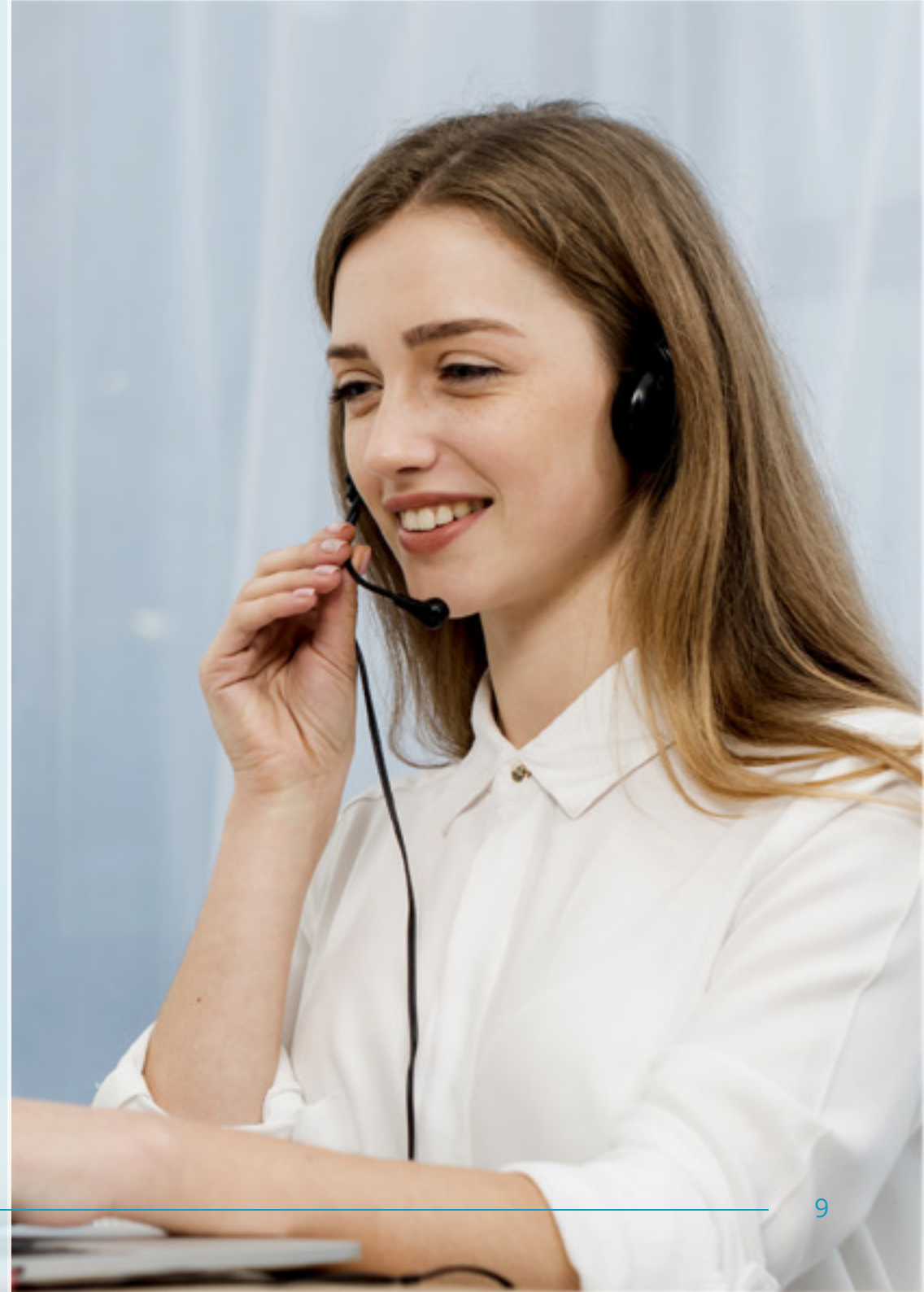
You can now convert every number inside Salesforce into a clickable hyperlink.

Log calls automatically

You can now save the notes that you mark down during a call automatically via objects like customer records, cases, or anything else that you develop.

Control your phone calls

Now you can control your calling functionality like making calls, putting them on hold, transferring calls, and adding people on conference without logging out of your Service Cloud Console.



Feature 8 Macros

Users can run macros to finish dreary tasks—choosing an email format, sending an email to a customer, refreshing the case status—all in a solitary snap. A full scale is a lot of guidelines that advise the framework of how to finish a task. At the point when a client runs a full scale, the framework plays out every guidance. Macros help your group spare time and include consistency.

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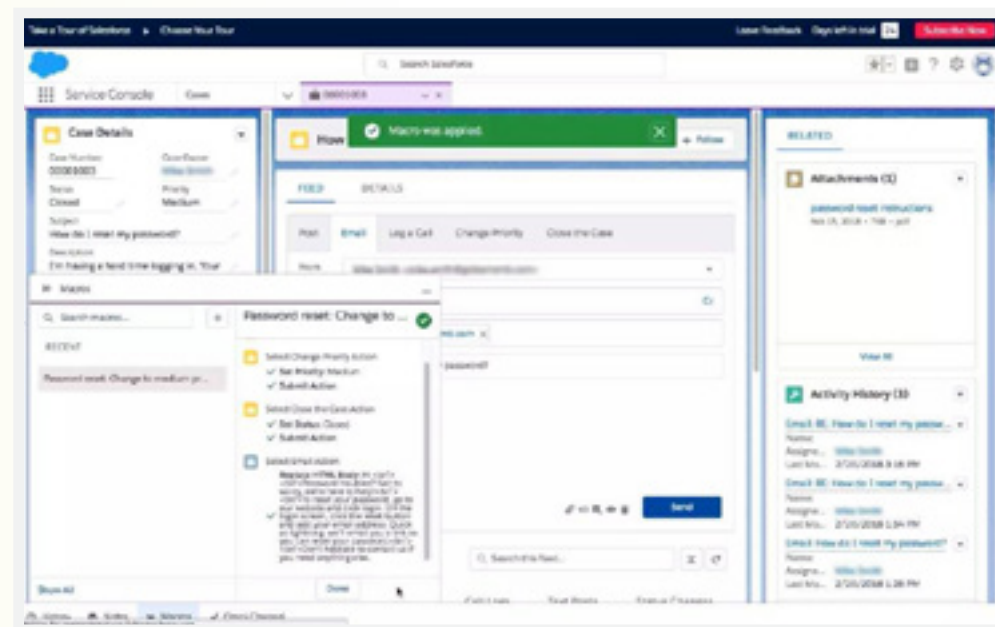
You can make macros to perform different actions. For instance, a full scale can enter the headline of an email and update the case status. A solitary full scale can play out various activities on various pieces of the case feed in the meantime.

Requirements for Macros

Before you make and run macros, guarantee that your organization meets the requirements for utilizing macros and afterward include the macros widget or utility to your application.

Irreversible Macros

A few macros perform activities that can't be fixed, for example, sending outbound emails to customers or refreshing a case status. A large scale that contains a Submit Action guidance is irreversible. You should have the Manage Macros Users Can't Undo client authorization to make, alter, and run macros that provide directions for performing irreversible activities.



Bulk Macros

A large bulk macro is a large bulk macro keeps running on numerous records in the meantime. Mass macros let bolster operators rapidly address spikes in client cases including a similar issue. Macros must meet specific criteria to keep running as mass macros.

Build a Macro

Macros enable you to robotize basic monotonous tasks and resolve issues with a single click. You build a macro by determining the directions for activities that the macro performs. A macro resembles a little PC program. You tell the macro each progression that it performs.

Run a Macro

Run a macro to robotize a progression of dreary keystrokes that you frequently perform physically when working with records. You can rapidly finish basic tasks, for example, refreshing the case status or sending an email with an overview connect, by running a macro.

Control Macros

You can clone a macro to create a macro with marginally different methods. You can likewise impart macros to different users. In any case, sharing works diversely in Salesforce Classic and Lightning Experience.

Control Macros

Survey the contemplations and limits that could affect you and your users when working with macros.

Keyboard Shortcuts for Macros

Use accessible console routes to work significantly more effectively with macros.





Feature 9

Entitlement Management

Entitlement management helps you in delivering the right help to your customers. Its assortment of highlights let you characterize, implement, and track administration levels as a feature of your support management procedure.

The crucial features about Entitlement Management include:

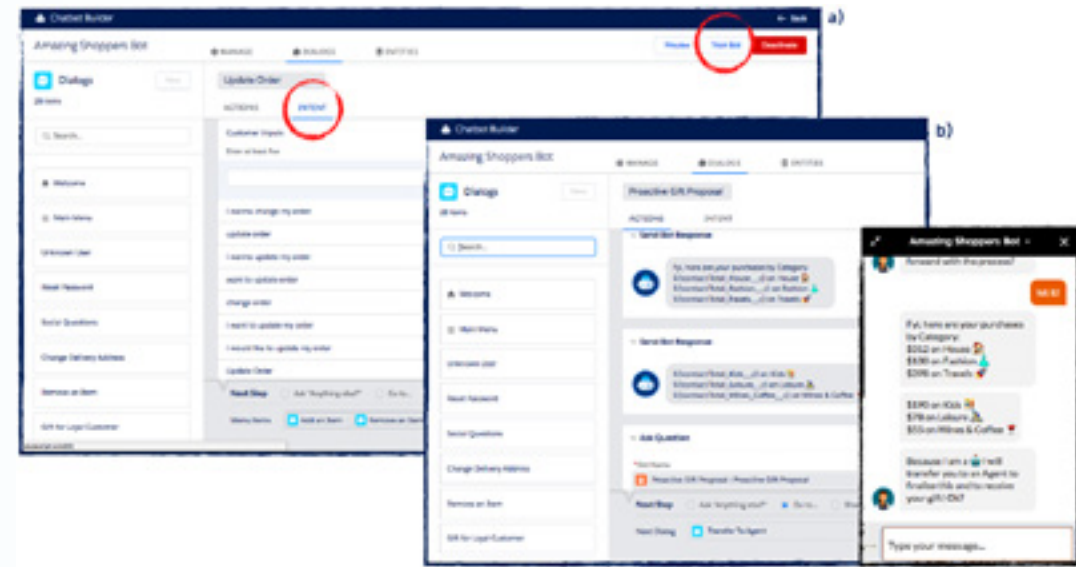
Make your agents make accurate decisions by integrating your Lightning Service Console dashboards with Service Cloud Information. Boost up with speedy ROI, with the current pace, scale & security you're already getting from Salesforce.

- » With help of entitlements, your support agents can regulate whether a client is eligible for support.
- » Entitlement procedures, that enable you to design timelines which include the crucial steps which your support group must complete to solve support data like cases or work tasks.
- » Service contracts give you the access to perform various types of customer support arrangements like subscriptions, warranty, and other maintenance arrangements. You can also restrict this service contract to include certain products.
- » Access to community entitlements will give community users the ability to see entitlements and service contracts and build support records through them.
- » Entitlement Reporting will let you track the entitlements which are utilized in your Salesforce org and whether if your service contract agreements are met.

Feature 10 Einstein Bots

Develop and control Einstein Bots to make your service agents job easier. Einstein Bots can manage routine requests and save time for your service agents to tackle more complicated problems. Einstein Bots can acquire pre-chat data to ease your service agents' job.

- » **Firstly, what is Einstein Bot?**
A chatbot is nothing but a virtual software which initiates an online web chat via audio or textual format.
- » **Implement careful planning of Einstein Bot**
Implementation of careful planning is necessary to making your bot productive and your clients happy.
- » **What Makes Bots Move?**
Bots have parts in them that are in motion
- » **Top Steps for Conversation Design**
Let us go through the below points while designing your bot.
- » **Develop a Basic Bot**
Start by developing a basic bot and give it a name, greeting, and menu. After that, utilize the Einstein Bot Builder to implement dialogs and finish developing the bot.
- » **Bot Deployment to Channels**
Go through the available channels, set up new channels, and further initiate the bot deployment process in your bot's overview slide.



- » **Set Up a Bot Response Delay**
Set Up a delay response to each bot for further stimulation in typing.
- » **What do you understand by Entity?**
An entity illustrates a version of data that you need to acquire from a client. We have the below mentioned system entities: Date Time, Organization, Percent, Text, Money, Date, Location, Boolean, and standard Salesforce object custom. You can develop your own entities according to your requirement.

» **What do you understand by a Variable?**

A variable is a storehouse that saves certain amount of information acquired from the client or output via Salesforce. Variables can be utilized within dialog actions as both inputs and outputs and can be added as part of the texts into messages.

» **Set Up a Bot Chat Menu to Your Chat Window**

To help your customers in understanding what your bot can do and deliver them with consistent navigation, set up a bot chat menu to your chat window.

» **Evaluate and Train Your Bots to Understand Your Customers**

The main reason for your customers communicating with your bots is intents! Let us take an example to help us under this better: booking a flight, shifting a flight to a new one, acquiring store hours. Connect intent with your dialogs and then train your bot to develop a learning guide which your bot can utilize to understand intents. If your clients initiate communication with your bot by typing any message in the chat pop-up, utilize intents in helping your bot understand what they actually require.

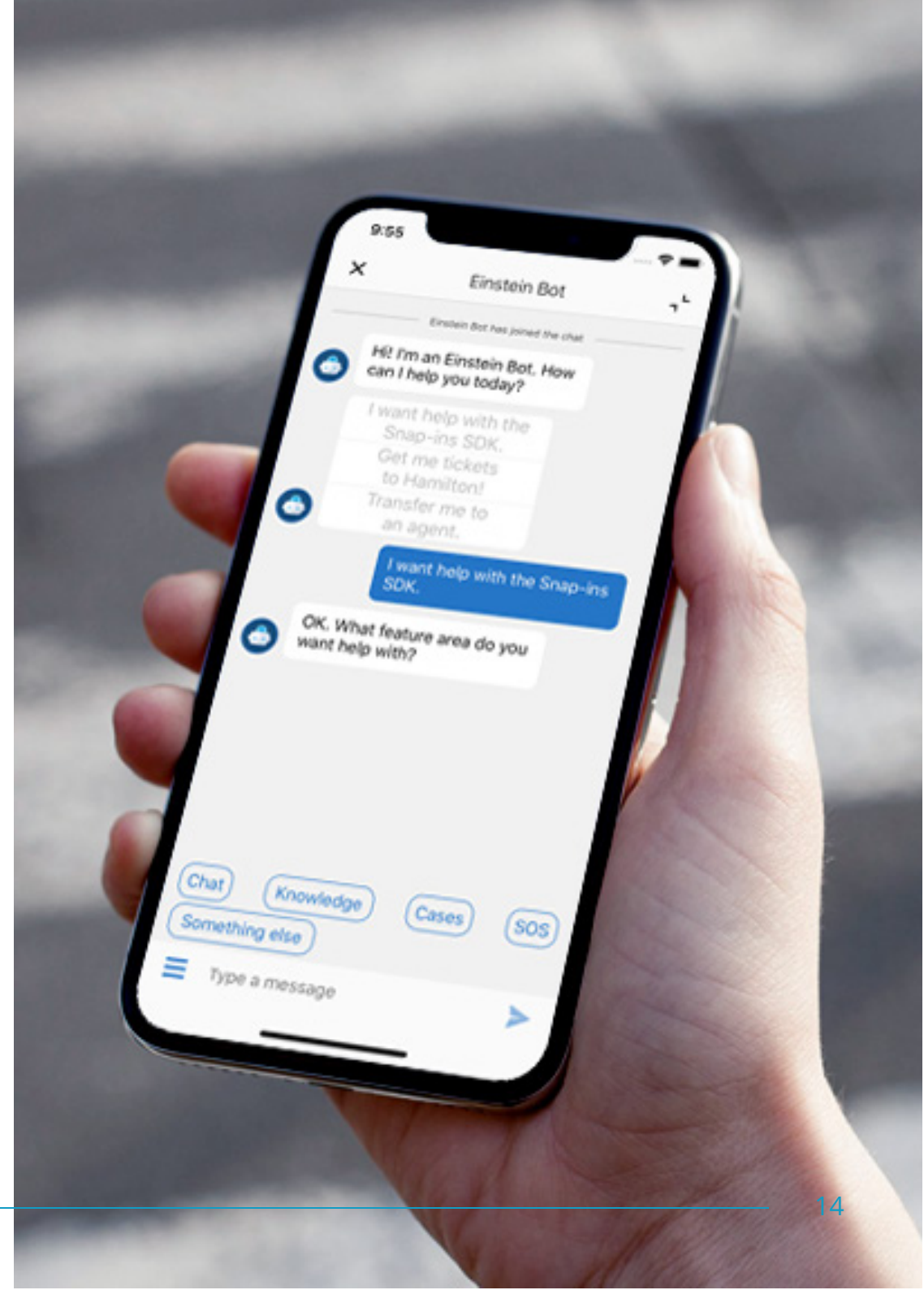
There is a page associated as the Model Management which delivers metrics on the quality of your bot's intent guide and a thorough view at singular intents. Utilize this data to fine-tune intents and enhance your bot's understanding ability in regards with your customers.

» **Activate or Deactivate Your Bot**

When you are ready to launch your bot to run, activate your bot and add your new agent to your team.

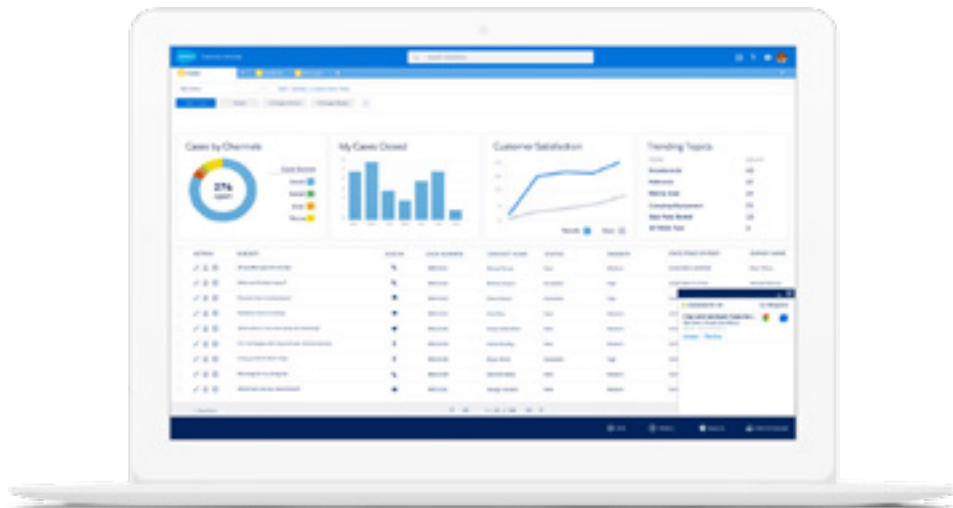
» **Observe, Analyze, and Improve Bot Activity**

Observe bot performance and see your event logs on the performance window.





Increase customer satisfaction and transform support with the #1 platform for service.



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About Cloudalyze :

As a Salesforce Silver Consulting Partner, we use Salesforce's industry leading products to help B2B and B2C companies build intelligent, omni-channel platforms that focus on the necessary things.

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