Service Cloud Messaging empowers companies to engage with customers through the messaging apps they love—all powered by Service Cloud, the world’s number one customer service platform.

Service Cloud Messaging brings service to customers right where they want it most: on their mobile device using any message app. Now, agents can connect with customers on Facebook or SMS directly through the agent desktop. And they can do it all through the existing customer care 1-800 line. Plus the agent never has to leave the agent desktop, so these interactions never leave the Salesforce environment. With Service Cloud Messaging you can:

* Move from transactions to conversations and even speak emoji.
* Use service chatbots for data gathering and simple FAQs, letting agents focus on more complex issues.
* Reduce call volume, operational costs, and boost customer satisfaction.

**Add Mobile Customer Service to Your App in a Snap Embedded Service**

Service Cloud Embedded Service for Mobile Apps are a set of tools that help you inject Service Cloud platform features into your existing iOS (iPhone, iPad) and Android apps.

Embedded Service for Mobile Apps aren’t separate products or stand-alone apps, they’re part of a software development kit (SDK) that is powered by the Service Cloud platform. You can use Embedded Service for Mobile Apps to add features like Knowledge and Live Agent (chat) to your mobile app. All of this is integrated seamlessly, so customers never have to leave your app to find the answers they need.

**Knowledge Base**

The Service Cloud Embedded Service for Mobile Apps let you connect your existing knowledge base to your mobile app. Use it to point to particular categories of knowledge, so customers can find what they need in a snap.

**Case Management**

Give customers the option to create a case right in your mobile app that is routed directly to your customer service agents who are using Service Cloud Console. Better yet, you have the flexibility to include an authentication feature to get additional details about the customer trying to reach your contact center, or not. It’s totally up to you.

**Real-Time Support**

We’ve got that covered, too. You can add Chat to offer your customers real-time, conversations with support agents. Make chat available in your apps, portals online, or even use bots to answer basic customer questions.

Experience Cloud is built on the Salesforce platform, so data from your site lives in your Salesforce org, and data living in your Salesforce org can be securely shared externally through your site. (Don’t worry. Your admin controls data visibility with the outside world and which audience can access what—just like you do with your internal Salesforce org.) In short, a site built using the Experience Cloud provides a window into your Salesforce world.

With Messaging, your business can integrate two-way messaging right into your service center. Your agents can engage in mobile conversations with customers from their computer using the Service Cloud Console, and they can even use emojis to add a more personal touch! Let’s recap the benefits of Messaging.

* It’s powered by the Salesforce Platform so intelligence and insights are surfaced to agents from any back-end system using Salesforce for Service.
* It’s a lower-cost channel than voice so contact centers can reduce telecom costs and volume.
* It makes your call center more efficient by giving agents the ability to handle multiple conversations versus just one phone call. The end result: You increase ROI.
* It’s conversational rather than transactional, which makes for a more personalized customer experience.
* It’s not tied to a browser so customers can reach an agent instantly, get the answers they need, and be on their way.

## On-Site Service: A Primer on the Players

Field service is much more than just sending someone out into the field with a clipboard and a truck. Field service management is a complex organization of work tasks that need to be performed on-site. In the end, great field service takes a collaboration among several individuals.

They include:

* The customer who makes the service request for a product that requires support
* The agent who receives the service request and creates a work order
* The dispatcher who ensures that the right work is assigned to the right mobile employee based on schedules, expertise, and location
* The mobile field worker who receives the work order and actually makes the on-site visit to complete the job

## Get to Know Field Service

With Field Service, all your call center agents, dispatchers, and mobile employees can work together on the same platform. It gives mobile employees the power to tap into job information, deliver updates, and quickly collaborate on the go, even offline. The information they need is in the palm of their hands.

Let’s take a look at how Field Service makes your customer service team work smarter and more productively—from the call center to the field.

**Scheduling: Get the right field agents where they need to be, when they need to be there.**

The smart scheduling feature in Field Service automatically optimizes scheduling, so that you can get the most out of every mobile worker’s day, and get them where they need to be on time. With skills-based routing, your agents are assigned tasks based on their particular skill set. And when they’re already on the move, dispatchers can view all scheduled appointments, see alerts for issues, and track where agents are. So businesses can direct exactly where their mobile workers need to go to keep wait times down and productivity up.

**Work orders: Get key customer insights.**

With Field Service, the service agent has a full view of the customer and their needs. This means they can create work orders that are mobile, connected, and fully integrated in other areas of the business and CRM, including accounts, contacts, assets, cases, entitlements, and service contracts.

**Connect: Create a virtual contact center in the field.**

Bring the information and power of your contact center directly to your mobile workforce right in the Field Service app, so workers can instantly view vital customer information, deliver updates, access knowledge articles, and collaborate with product experts on the go.

**Information capture: Get the job done on-site, even without cell phone connection.**

Because Field Service is built offline first, mobile employees can capture signatures, product barcodes, or register new opportunities no matter where the job takes them. They can instantly access information, and even make updates offline. As soon as their phone connects with a signal, the data is instantly uploaded to the Salesforce platform.

## Welcome to the Age of Self-Service

This probably isn’t hard to believe, but oftentimes the last thing a customer wants to do is pick up the phone and talk to a customer service agent. The same is true for instant messages, SMS, and social. Sometimes, customers just want to solve the problem on their own.

In fact, [according to Harvard Business Review](https://hbr.org/2017/01/kick-ass-customer-service), 81% of customers would rather try to take care of their issue themselves before reaching out to a representative. That’s why it’s more important than ever for companies to offer not only a self-service solution for their customers, but a single place they can go to ask questions of other users, access their account and request support.

Salesforce Experience Cloud paves the way for companies to do just that. They can offer partner sites, employee sites, or customer sites. But for now we’re going to talk about Experience Cloud and how it can bolster your business.

## Create a Whole New Customer Experience with Experience Cloud Sites

Self-service has become the new welcome mat for a growing number of customers. That means it can be the first service interaction a customer has with a brand.

With that in mind, a self-service solution should be much more than a place where customers try to troubleshoot problems on their own. It should be more useful than a beefed-up FAQ page. It should and can be:

* A gathering place for your customers to help themselves and act as subject matter experts to help one another.
* An account portal where customers can instantly access information they need.
* A support hub to engage with agents, ask questions, and get guided help.

You can create your own branded self-service sites and portals with Salesforce. With Experience Cloud, you can take a basic FAQ page and make a true self-service portal for customers, a place where they can find everything they need, from knowledge articles to user forums, and even opportunities to chat with support agents.

## Integrate Service Cloud and Experience Cloud on One Platform with Salesforce

The big benefit of building your customer portal on the Salesforce platform is, of course, that you’ll have everything on the powerful Salesforce platform. That means that it’s fast and easy to seamlessly integrate the Salesforce features you need directly into your portal, including Service Cloud. There are tons of useful features Service Cloud brings to your customer sites. Let’s take a look at a few of them.

* Create a One-Stop Customer Experience: You can integrate business processes, including account balances and preferences, from Salesforce or other third-party systems so customers can find what they need without leaving the site.
* Give Customers Access to More Knowledge: It takes just a few clicks in the Experience Builder to take previously internal how-to guides and articles and push them to your customer site. Now, customers have access to all your support resources at their fingertips.
* Provide Support the Way Customers Want It: Whether it’s posting a question in a self-service forum, starting a live chat, or formally logging a case with support, Service Cloud offers a full suite of service options that you can make available through your customer site. Bonus Tip: All service cases filed in the site will show up in Salesforce, so you can easily track them and collect reports.
* Deliver Smarter FAQs: Rather than generic FAQs, Service Cloud makes it possible to surface the right article the first time. How? Salesforce Einstein uses the customer’s activity on the site to determine the most relevant discussions and articles to show them.

## Make Customers Happy and Increase ROI with Experience Cloud Sites

Beyond providing another channel for your support team to deliver awesome customer service, sites can help solve other key business challenges.

Two ways that your company can benefit from a customer site.

1. Boost Customer Satisfaction:

Sites let you make more information available to customers, so they don’t have to go through the process of contacting a support agent to deal with routine requests, such as resetting a password or checking on their account balance. They can do these types of things themselves quickly and easily, right in the site.

2. Decrease Call Volume:

By using a customer site to deflect some of the more mundane service inquiries, companies can drastically reduce the number of incoming calls their agents receive. Agents are not only taking fewer calls, but can focus their time and energy on more difficult and complex customer issues that may require more agent attention.

## The Power of Analytics in the Field

You can use these powerful analytics tools in the field, too. With Field Service, service technicians can access vital information such as customer purchase history and knowledge articles. All of this helps close cases faster—and keeps customers happy every step of the way.

## Access KPIs with a Click

With Service Analytics, you can set KPIs in a single dashboard. By drawing on existing Salesforce data and trends, your entire service team can deliver personalized service using best practices based on proven customer satisfaction metrics. That lets your agents anticipate your customer’s needs at all times. Agents can identify product and service issues and their causes, then use predictive case fields with recommended next best action to resolve issues quickly. They can also keep track of their own performance and how they compare to their peers.

## Turn Data into Metrics—and Higher ROI—with Einstein Discovery

Albert Einstein taught us that creating simplicity from complexity can change the way we see the world. That’s how metrics can change the way we deliver customer service. And that’s where Einstein Discovery fits into Service Analytics. You have all this awesome data at your fingertips, and now you need to make sense of it all. For starters, metrics are a simple way to measure success and failures and adjust your business strategy accordingly. How you gather, measure, and use that data helps shape your customer’s happiness and your own ROI.

Einstein Discovery is like having your own personal unbiased data scientist, right inside your app. It sifts through millions of data points in minutes, it takes those results, and creates new insights that are used to determine what’s happening with your business and why. You’ll receive smart predictions flagging trends along with recommended actions. Agents can use these insights to deliver faster, more personalized service. Einstein Discovery gives you metrics to make every one of your agents a regular Einstein. Here’s how:

* Create reports: Reports are built on the data to answer questions such as how reliable is a certain product? Reports serve up as a list of records that meet your criteria. Even better, reports in Einstein Discovery can be filtered, grouped, or displayed in a graphical chart with narrated descriptions that help you understand the meaning of every graph. These reports, complete with speaker notes, can surface in Salesforce or exported to Microsoft Office.
* Understand the data: Dashboards are the visual displays of key metrics that you’ve defined for your reports. They can display everything from buying trends and inventory patterns, to past customer satisfaction levels by product or service.
* Make the most of your metrics: When it comes to reporting capabilities for your dashboards, it’s important to understand what to measure, and why. First, decide what metrics really matter to you. Pick a limited number of key performance indicators that you want to follow (5 -10 metrics is a best practice). And limit the number of reports and dashboards to really target business objectives.

## Turn Your Contact Center into a Profit Center

If metrics are accessible from a service agent’s console, you and your agents can spot trends and act on them immediately. You can design processes for your contact center that match common trends and themes, all based on how and when customers contact your company. You can count on these same processes to drive more revenue.

**Deliver Proactive Self-Service**

You can use proactive processes to help customers help themselves. For instance, what if on the last day of the month, your call center consistently gets a large number of inbound calls about a common billing question? Using Service Analytics, you can design a process that delivers the answer to that question through a customer site. You can also give customers self-service options to connect with others in the site to get their answers quickly. This keeps your call volumes down, and your agent productivity up, resulting in a positive bottom line.

**Empower Your Service Agents**

Service Analytics gives your agents the power to deliver service tailored to a customer’s likes and needs. This helps your agents proactively upsell and cross-sell based on customer past buying histories. For example, Service Analytics suggests products a customer might like or provides special incentive offers based on trending buying habits. This leads to increased sales, topline growth, and satisfied, loyal customers.

**Congratulate Yourself on a Genius Idea**

You’ve chosen Service Analytics. Now your customer service agents are also product lead generators. They’re your newest revenue stream, your next competitive advantage—and your next key business driver.