Industry Concepts

- Contact Center Metrics: Real-time Q-Metrics, Calls Per Hour, Saves/One-Call Resolutions ("one-and-done" or FCRR/First Call Resolution Rate), Average Handle/Wait Time
- Deflection Techniques: when customers can self-solve questions on website
- Business Continuity Challenges and Business Drivers: Help Desk, Product Support, Telesales, Service, Field Service
- Core Tenets of Knowledge-Centered Support (KCS) & Information Technology Infrastructure Library (ITIL)

Metrics

- The KPI for Call Center Operations, Customer Service and Back Office Processes
- Calls per Hr: # of Calls an agent can take in and hour
- Saves/One-Call Resolutions: # of times agents can address issue within first call
- Average Handle Time: How long to take the call + work done after call
- Average Wait Time: How Long caller is on hold
- Abandonment Rate: % of callers who disconnect before agent can get to the call
- Completion Rate: Ratio of Successfully Finished Calls / Number of Attempted calls

Call Deflection

- World-class deflection rate: 70-80%, Norm: 30-50%
- Web self-service interaction can be 10 to 20 times less costly than the most efficient agent-enabled phone call
- *Call deflection has to be part of a larger knowledge base strategy*, search engine must be able to locate solutions based on the customer's input (key KCS tenet)
- As self-service becomes available, may see an increase in the number of customers seeking support (don't like phone support)
- Content gaps need to be identified on continuously using Analytics reports (ATG, InQuira, Knova and Talisma)
- Reports that can provide:
  - Top 100 Q with Neg Feedback
  - Failed Qs, Qs by product line

Continuity / Drivers

- Business Continuity is about planning for those mundane events: weather, strikes, fire
- All about maintaining confidence in your customers and suppliers that you will be able to continue business as usual during an outage
- Call Center Env Drivers:
  - Product & Service Support
  - Web Self-Service
  - Travel Desk
  - Telesales (In/Outbound)
  - Order Status Tracking
  - Outbound Disaster Aversion
- Call Center Actions Drivers:
  - Support Incident
  - Billing Dispute
  - Performance/Feedback
  - Feature Request
  - Installation Request
  - Orders
  - Bugs/Defects
  - RMAs

Core KCS

- KCS: knowledge as a key asset of the customer/ technical support organization: *create content as a by-product of solving problems*
- ITIL incident management process: The problem management process
- The knowledge must be available and searchable in the *customer's own words*. Recording support tickets in the customer's own words is a key tenet of KCS
- Evolve content based on demand and usage: *knowledge is evolved just-in-time based on demand* NOT just-in-case
- KB includes knowledge that is at different states of trust and visibility

Implementation Strategies

- Determine: Plan, Requirements, Design, Build, Test/Document
- Determine: Deployment Strategies
- Determine: Adoption and Measurement Strategies

Plan / Design / Build

- Business Drivers:
  - (a) High Quality “One-and-Done”
  - (b) Streamline Case Resolution
  - (c) Increase Agent Effectiveness
  - (d) Self-Learning Knowledge Base
- Business Processes:
  - (a) Capture & Assign Cases
  - (b) Unified Case Mgmt & Automation
  - (c) Agent Productivity
  - (d) Service Knowledge Mgmt
- CRM Solutions:
  - (a) Web-to-Case, Email-to-Case, Customer/Self-Service Portals, CTI, Assign Rules, Auto-response, Manual Assign, Data Loader
  - (b) Case Support Process, Case Close Page Layout, Escalation Rules, Workflow/Approvals, Validation Rules, Reports & Dashboards
  - (c) Console, Interaction Tracking, Case History, Adoption/Training
  - (d) Solutions, Solution Categories, Public Knowledge Base, Approvals

Map:
Business Drivers ->
Business Processes ->
CRM Solutions

Deployment

- Unified Messaging: Web, Voice, Email, Chat, Fax in ONE application
- CTI: Computer Telephony Integration:
  - Authentication of Caller
  - Router Call to Best Handler/Agent
  - Provide IVR (interactive voice response)
  - Auto-match caller number with customer record (screen pop)
  - Manage Call via computer: conference, transfer, hold etc.
  - Call Scripts to handle call
- E-mail Response Management Software (ERMS) applications allow agents to work on a common pool of e-mail, route e-mail to the appropriate agent, track/audit, set reminders, review, escalate and monitor emails
- Text based Chat: Reactive Chat (initiated by the user), Proactive Chat (track user web-clicks to and get users to engage in a Chat
- Web Self Help: collection of Q-A pairs in which answers returned using keyword search, statistical models, or Bayesian or Expert Networks (AI)
- *Fax/Faxback Integration; Collaborative Browsing (help to fill out forms); VoIP; OLAP/Data Mining/Data Warehousing*

Adoption / Measures

- Align Agent Incentives
- Reward and Promote:
  - Leverage Dashboards
  - Customer Satisfaction Sensitivity
- Metrics should go beyond case volume
- Use Train-the-Trainer
- Ensure that it’s repeatable
- Tie metrics to identify training opportunities
- Train in groups

Service Cloud Solution Design

- Design: Capabilities & Limitations with design trade-offs
- When to Extend into Custom Application development
- Performance Considerations
- Service Cloud Console: designed for users in fast-paced environments who need to find, update, and create records quickly (NO Portal)

Design

- Cases should display: Entitlements, Account, Contacts, Assets
- Entitlement Only: Bundle Product Support with Warranties and view Entitlement
- Entitlement + Service Contract: Sell Support separately, manage renewals, longer term support
- Entitlement + Service + Line Items: Manage Service Contract Details, Track Product Line Item Support

Extending App

- Entitlement Process: Collection of Milestone with a required timeline
- Milestones: Time dependent required actions (Service Level Agreements: SLAs)
- Each Milestone has an Entry and Exit criteria
- Not all Entitlements require Entitlement processes, if there is no need to track Milestone no process needed
- Milestone Actions (time-dependent WF actions:
  - Success
  - Warning Action
  - Violation Action
- Milestone Action Types:
  - Tasks
  - Email Alerts
  - Field Update
  - Outbound Msg (API)
  - Previously Defined Actions

Performance

Console

- Console respects all of the security and sharing settings in your Org
- Can't add a custom logo to Service Cloud console apps (counts against your custom app limit)
- Service Cloud Console Integration Toolkit, or custom components, for custom functionality for the console
- Knowledge Sidebar in the Service Cloud console that displays titles of Salesforce Knowledge articles that may solve the case you're working on
- Use the interaction log to write notes in call logs while using the console. A call log is an activity record that automatically generates when you use the *SoftPhone*

Knowledge

- Provide targeted Search Results
- All Channels, for experience of peers and customers
- Used by Support Agents, End Customers & Sales Reps
- Information is tagged with ratings and also how often it's read is tagged, *Answers can be promoted to Articles*
- Community application 'Answers' enables users to ask questions and have community members reply

Article Types

- Templates for Articles (short HTML docs), type defines how it is rendered, at least ONE type needs to be active
- 2 standard Types (presentation): Tab, Table of Content, use VF to create new custom types
- New fields can be add to article types and also to the page layout (e.g. FAQ, Guides etc.), field types are:
  - Date & Date/Time
  - Picklist, Multi-Picklist
  - Text / Rich Text Area
  - File field for Attachments
- Display Channels:
  - Internal User
  - Partner Portal
  - Customer Portal (personalized login customers)
  - Public Knowledge

Data Cat / Ratings

- Data Cats (setup->customize) used to categorize articles and target specific roles
- Articles are tagged with cats to allow searching/sorting easier, they can be Hierarchical structure (5 levels deep)
- Cats are hidden until activated
- Orgs WITHOUT Roles all Cats are visible to all users
- 2 Types of visibility: Roles, Default
- Roles: Map Cats to Roles
- Default: For access to Cats by users without Roles
- Internal / Customer Portal users can Rate articles (1>5)
- Every 15 days if the article did not receive a new vote it's average moves down half-life

Access

- Knowledge per user license, must have 'Knowledge User' checked
- Manage Visibility Setting of Articles based on Role
- *Customer Portal users inherit the access rights* of their Account owner
- Users without roles see uncategorized articles (if Access All Data is not set)
- Publishers only assign categories once roles have been defined
- Can ONLY have 5 Active + 5 Inactive Category Groups at a time
- View, Edit, Manage Knowledge, View/Manage Data Cats

Searching & Application

- Search (Synonyms): You may create up to 6 synonyms and minimum of 2
- Search (Stemming): Already available, e.g. Search for 'Land' and it will automatically search for 'Landed' and 'Landing'
- Application consists of tab: Home, Cases, Articles, Article Management (for publishers)
- Existing Reports for Cases with Articles
- Develop data mgmt strategy, de-dup for accuracy of articles, review metrics
- Profile dependent visibility to different sections of an Article (e.g. Internal Comments)
- Auto-search articles when creating a new case (title will auto-search on articles)

Interaction Channels

- Different Interaction Channels: CTI, Telephony, Chat, Web, Ideas, Answers, Email & Social Media
- On-Premise / On Demand Email-to-Case
- CTI Features + Architecture
- Portals and Sites

Channels

- CTI, Phone, Chat, Web, Email, Ideas & Answers
- Ideas: Suggestions posted by the members of an ideas community
- To Publish Articles (permissions needed):
  - Manage Articles
  - CRED on article Type
- If you do not have permission you can 'Submit for Approval'
- Import Articles (permissions needed):
  - Manage Salesforce KN
  - Manage Articles
  - Manage KN Articles Imp/Exp
  - CRED on Article Type

Email-to-Case

- Emails are automatically converted to cases based on the settings specified for each routing address
- Use Email-to-Case if you have a requirement to keep all email traffic within your firewall, and you want to accept email attachments larger than 10 MB from customers
- Use On-Demand Email-to-Case (uses Apex email Services) if you are not concerned about keeping email traffic within your firewall, and you do not need to accept attachments larger than 10 MB from customers
- Use Web-to-Case to create a CSAT survey; use Case Type: 'Survey'

CTI

- Integrate Telephony with call center application
- Can intercept Calls
- Transfer Calls
- Allows scripting to be incorporated in to the call

Portals & Sites

- Salesforce Customer Portal is hosted by salesforce.com
- Customer Portal is similar Self Service Portal
- Can have KN Base for customers
- Allow participation in Ideas communities
- Manage customers with profiles, roles, and sharing rules
- Branded Site

Entitlements & Case Management

- Entitlement Model: Entitlement Only, Entitlement + Service Contract, Entitlement + Service Contract + Line Items
- Entitlement Process: Milestones, Warning, Success & Violation actions, use of *Business Hours defined on the Entitlement*
- Entitlement Templates for Creating Cases
- Milestone Reports

Models

- Cases should display: *Entitlements, Account, Contacts, Assets*
- Entitlement Only: Bundle Product Support with Warranties and view Entitlement
- Entitlement + Service Contract: Sell Support separately, manage renewals, longer term support
- Entitlement + Service + Line Items: Manage Service Contract Details, Track Product/Asset Line Item Support
- Cases show detail Entitlements with a 'Milestone' icon to show compliance or not

Process

- Entitlement Process: Collection of Milestone with a required timeline
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  - Field Update
  - Outbound Msg (API)
  - Previously Defined Actions

Templates

- Templates allow creation of support for different types of tiers: Premier, Gold, Silver etc.
- Predefined support contracts associated to certain products
- Each template can be assigned to the product in the product catalog
- Entitlement templates can be added to the Product's related list so that agents can add them easily when selling the products
- When adding Entitlement related list to the Account, Contact, Asset layouts the 'Create a Case' is a quick way to create a case using the Entitlement Template associated to it

Reports / Nav

- Standard Case Milestone Report which display Status of Milestones by Case
- New Reports created with custom report types
- Crate Entitlements from Entitlement Tab or Service Contracts, Accounts & Contact related lists
- Associate Entitlement Process and Business Hours, account and service contract pre-populated

Contact Center Metrics

- Reporting Solution considerations: data source, volume, contact center technologies
- Reports & Analytics for: Agents, Supervisors, Managers and Executives

Report Factors

- Three Key Metrics:
  - Agent Productivity
  - Customer Service KPI
  - Customer Metrics
- Agent Productivity Metrics:
  - Case Volume by Agent
  - **Open Cases By Agent**
  - **Closed Cases By Agent**
  - Escalated Cases By Agent
  - Top Aging Cases
  - Average Time to close by Rep
  - New Solutions Created
- Customer Service KPIs:
  - # First Contact Resolutions
  - **Average Time to Close - Trend**
  - **Monthly Trend By Type**
  - Case Volume By Channel
  - # of Case by Month/Qtr/Year
  - Cases Created By: Type, Priority, Reason
  - Average Status Duration
  - CSAT: customer service satifaction
  - Top Solutions
- Customer Metrics:
  - Customer to Watch By Account: High Priority Cases, Total Cases
  - Aging High Priority Cases
  - **Cases Escalated By Account**
  - **Top Account by Volume**

Report Analysis

- Agents:
  - Summary Reports
  - Individual Performance
  - KPIs
  - Go to: HomePage, Dashboard, Dynamic Reports via link
- Account Managers:
  - Account Summary Reports
  - Summary Stats
  - Customer Metrics
  - Go to: Dashboard Component, Dynamic Reports
- Managers/Exec:
  - KPIs
  - Agent Productivity
  - Customer Metrics
  - Team Metrics
  - Go to: Homepage, Dashboard

Integration & Data Management

- Integration Design considerations for large data, transactions
- Common Design Integration Patterns
- Data Migration

Design Consideration

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Design Patterns

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Data Migration ‘Gotchas’

- Migrate Record Created & Last Modified Dates
- Migrate Case Comments Created Date
- Migrating the Case #
- Migrating Customer Portal Users
- Cannot Migrate Case History
- Cannot Migrate Case Closed Date