

The Salesforce way to delivering expert customer service with Slack.

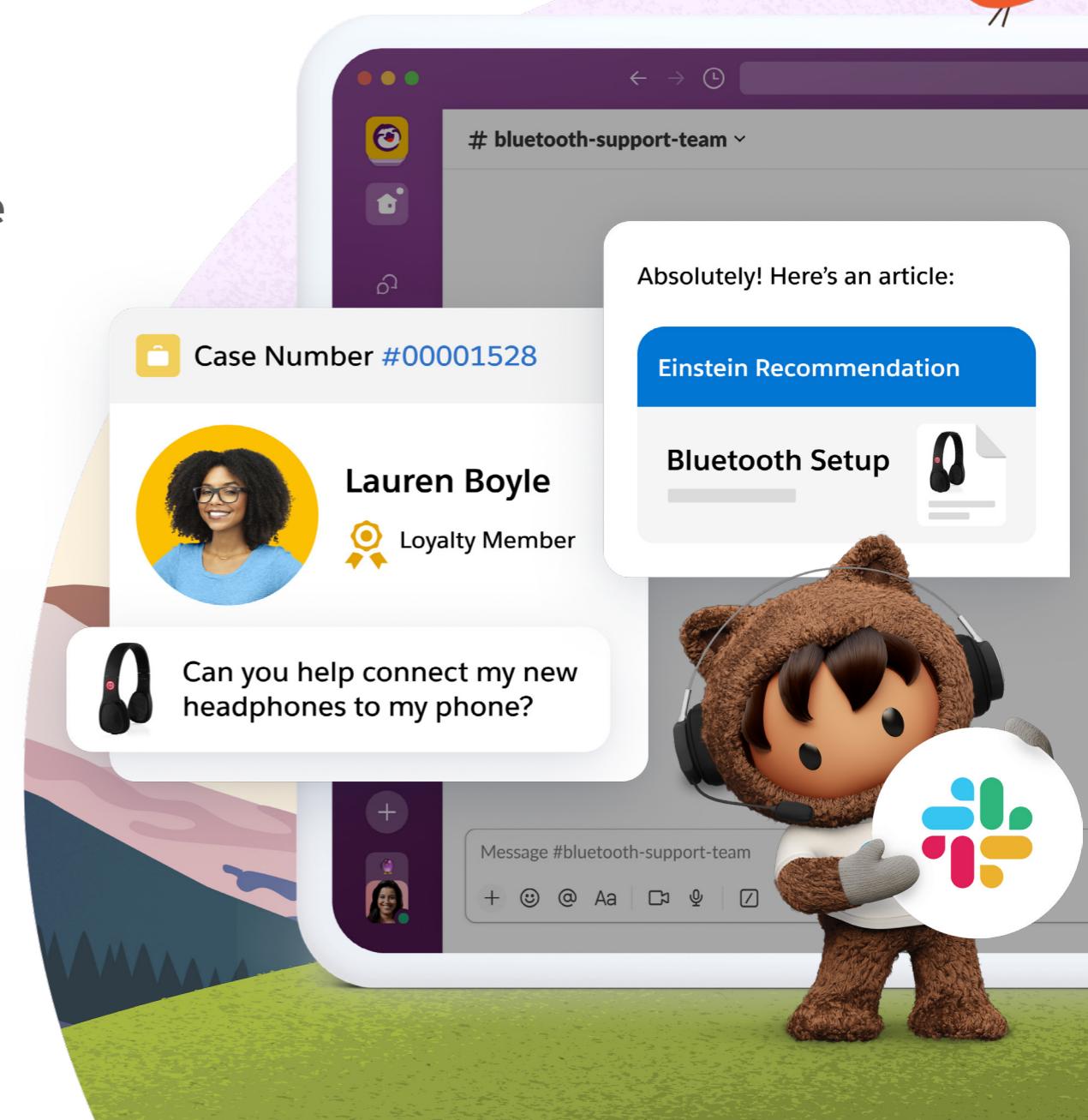


Learn how the Salesforce service team is delivering superb customer service in less time with swarming, automation, and more.

Salesforce customer service agents rely on cross-functional collaboration. Providing customers with top-notch support requires working with colleagues across several teams – IT, product, and sales – and time is always of the essence.

Companies know it's critical to help customers quickly and without friction. [Most service agents](#) (78%) say it's difficult to balance speed and quality support. And [88% of customers](#) say the experience a company provides is as important as its products.

To meet and exceed customer expectations, leaders must empower their company's entire service operation with the right tools, automation, and conversations. That's why Salesforce has relied on Slack as its intelligent productivity platform to deliver expert customer service since 2019.





Salesforce service agents use Slack to swarm on issues with cross-functional partners. Because conversations in Slack [channels](#) and [threads](#) are infused with case and customer details from [Service Cloud](#), everyone can easily find information, manage cases, and address service requests in the Service Cloud Console or Slack.

[Jim Roth](#), President of Customer Success at Salesforce and an early proponent of Slack, said Slack has helped Salesforce's support teams more easily connect with internal experts to resolve complicated issues quickly. "For complex issues, adding more support agents doesn't always solve the problem faster," he said. "To gain speed, you need better processes and tools like Slack that enable rapid collaboration."

Slack customers report that their service teams are seeing a 36% ROI after 24 months, according to Salesforce's recent Customer Success Metrics. This e-book will show you how service teams can use Slack to harness the full potential of automation, help agents with institutional knowledge, and foster customer loyalty and retention with premium service.

The screenshot shows the Slack desktop application. On the left is the sidebar with the workspace name 'Acme Inc' and a list of channels: #announcements, #random, #engineering-crit, #Gizmo, #launch-gizmo, #team-gizmo, and #proj-gz-docs (which is selected). Below the channels are sections for 'Direct messages' (Lee Hao, Sara Parras) and 'Apps' (Google Calendar). The main area shows a conversation in the '#proj-gz-docs' channel. The first message is from 'Arcadio Buendia' at 10:01 AM, followed by a reply from 'Lisa Zhang' at 10:12 AM. Arcadio replies again at 10:13 AM, and Lisa responds at 10:15 AM. There are also messages from Arcadio at 12:32 PM and Lisa at 12:33 AM. The interface includes a search bar at the top and various UI elements like a message input field and reaction icons.



Sanjeev Balakrishnan
SVP, Customer Support,
Salesforce

“ As a global team supporting a diverse set of products, Slack has played an integral role in helping us adapt to an evolving environment and deliver strong business outcomes.

Accelerate resolution time with automation.

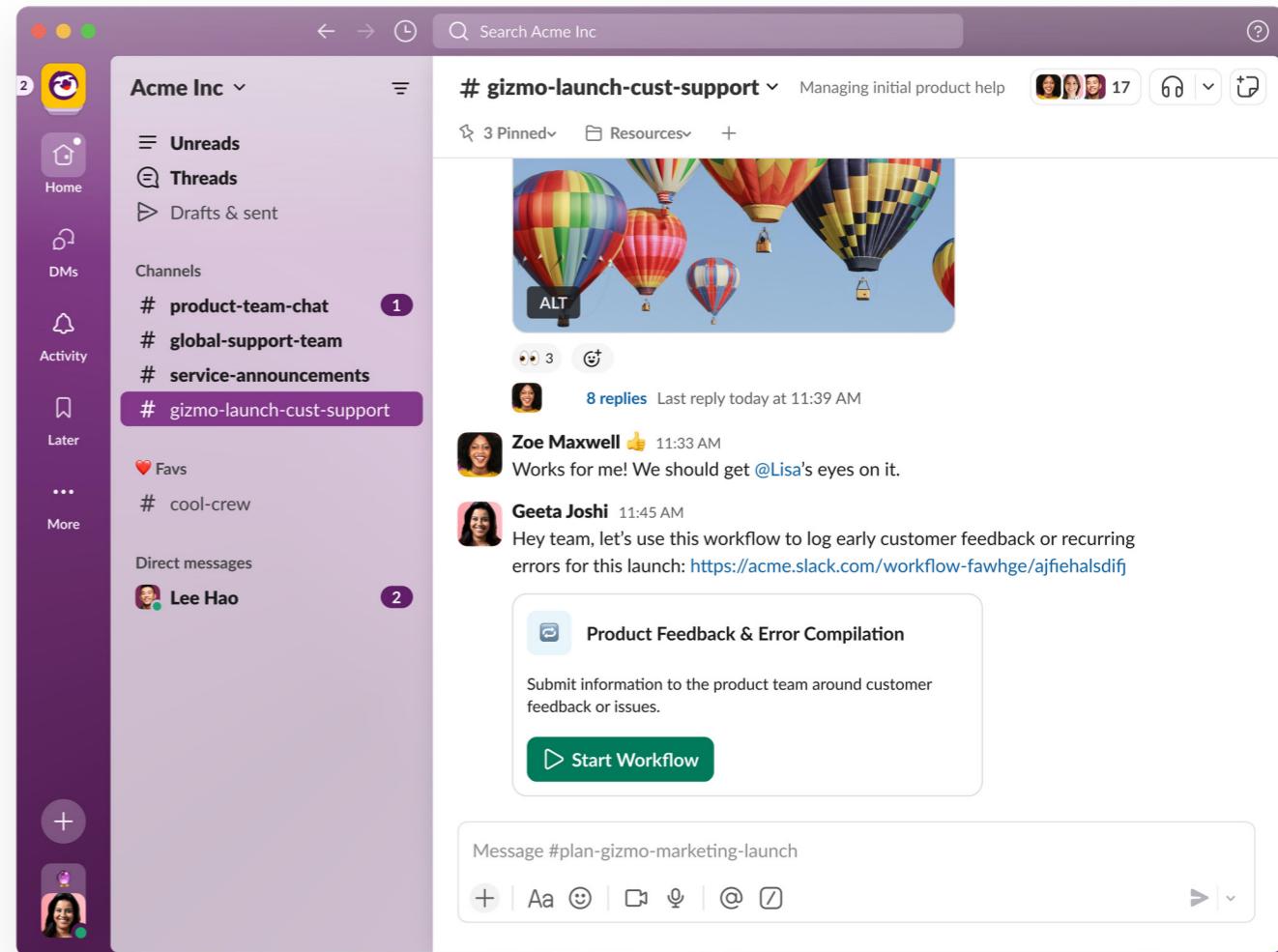
Before adopting Slack, the Salesforce team collaborated mostly using email, text messaging, and other messaging apps. This led to context switching and bottlenecks as agents toggled between disjointed tools to escalate an issue. With information being in different places, it was a challenge to have a consistent source of truth.

Now support agents troubleshoot, share knowledge and discuss work in Slack channels, which offer a single place to share messages, digital tools, and files. [Slack's flexible platform](#) also integrates with the apps agents depend on to escalate and resolve cases, such as [Service Cloud](#). Agents can access and manage Service Cloud cases and incidents directly in Slack.

The screenshot shows the Slack desktop application interface. On the left is a sidebar with icons for Home, DMs, Activity, Later, and More. The main area has a purple header bar with a search field containing "Search Acme Inc". Below the header, there are two main sections: "Automation" and "Recently used". The "Automation" section has a purple header and lists "Recently used" items: All workflows, Templates, Workflow builder, All apps, and App Directory. The "Recently used" section has a white header and lists items from today: Request IT equipment, Submit PTO, Product Feedback, Introduce yourself, and Report a bug. A modal window titled "# gizmo-support-team" is open, showing a pinned message from Lisa Zhang (@Lisa_Zhang) at 9:59 AM: "Hello, I'm Lisa Zhang, a customer service director with Acme Inc. I'm excited to be joining the team and supporting our customers!". A yellow hand emoji is positioned in the top right corner of the modal. In the bottom right corner of the main window, there is a small icon of a character in a hot air balloon basket.

With Slack, agents can easily automate standardized, necessary tasks using [Workflow Builder](#). This intuitive, no-code tool allows service agents to automate routine functions like reporting outages, collecting requests from teams, refunding customer overpayment, and collecting product feedback.

Agents can use these workflows within designated channels. Take an approval request: Once submitted through a workflow, the request routes to all stakeholders, including the rep's manager, and a record of the request is shared in the appropriate account channel. All necessary parties are informed so they can quickly review the request and approve it in minutes.



Mahua Choudhury-Hironaga
VP, Operations,
Salesforce



Slack helps us get the resolution faster. We have the ability to pull multiple groups of people into a conversation quickly to collaborate. Because Slack connects to our system of record, we can pull information without having to duplicate work.

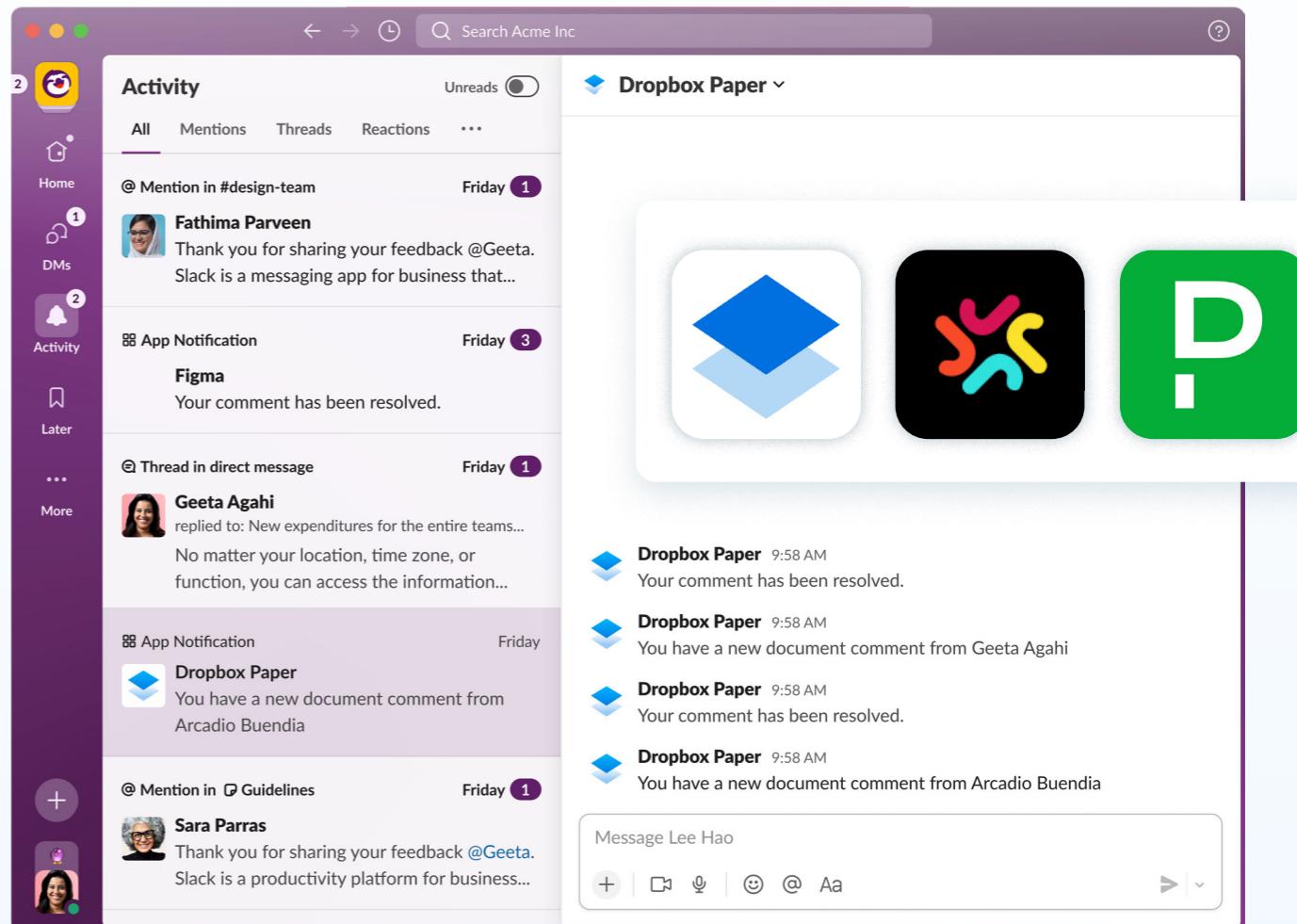


Harness data insights in Slack with automations and integrations.

Slack has [integrations with over 2,600 software tools](#) and custom apps, enabling all work to be done on one productivity platform. Being able to quickly find, share, and act on information across tools without juggling tabs means service agents can find answers faster and stay focused on more meaningful work.

The [PagerDuty Slack integration](#), for example, allows users to collaborate and trigger, view, acknowledge, and resolve PagerDuty incidents directly in Slack before they escalate. And when it comes to helping cross-functional teammates like sales reps find customer data, service agents use a [custom app](#) called Ask Virtually Send.

Agents also save serious time using Jarvis, an internal AI-based integration used by Salesforce's service teams to provide data access to everyone in Slack. Jarvis generates slide decks and customer insight reports directly in Slack, freeing agents to spend more time with customers.



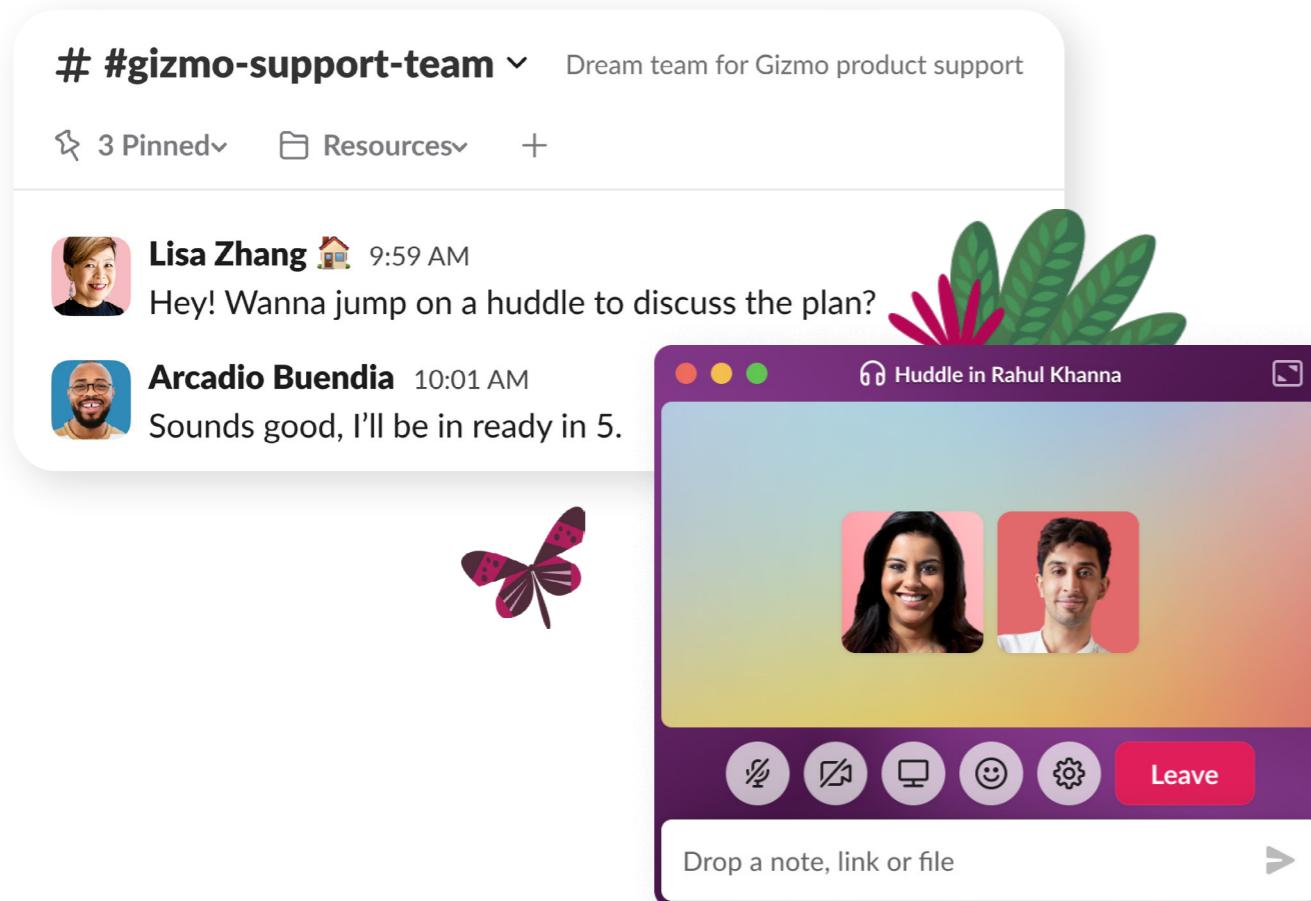
Helen Matsumoto
Product Management
Associate, Salesforce

“ Slack is such a flexible platform. You can build it out to meet your needs as an organization and provide greater value for your customers.

Complete tasks with lightning speed and stay accountable.

Gone are the days of sifting through sticky notes and handwritten to-do lists. Slack offers features to help agents simplify their workday, such as [Later](#). This feature allows teammates to create and organize their to-do lists with “in-progress,” “completed,” and “archived” tags and automated reminders.

When agents need to discuss a problem live in real time, they turn to [Slack huddles](#), a light-weight, audio-first way to communicate in a channel. Service agents use huddles – with or without their cameras on – to do everything from triaging incidents by sharing their screen to conducting weekly one-on-one meetings. They’re also used for virtual coffee breaks.



#gizmo-support-team ▾ Dream team for Gizmo product support

3 Pinned Resources +

Lisa Zhang 9:59 AM Hey! Wanna jump on a huddle to discuss the plan?

Arcadio Buendia 10:01 AM Sounds good, I'll be in ready in 5.

Huddle in Rahul Khanna

Leave

Drop a note, link or file



Elizabeth Settle
Customer Success Strategy & Analytics Senior Manager, Salesforce

“ Automations and workflows make simple tasks easier to complete and accelerate productivity. Slack keeps my to-do list in check during the workday.



Give agents the knowledge to resolve issues.

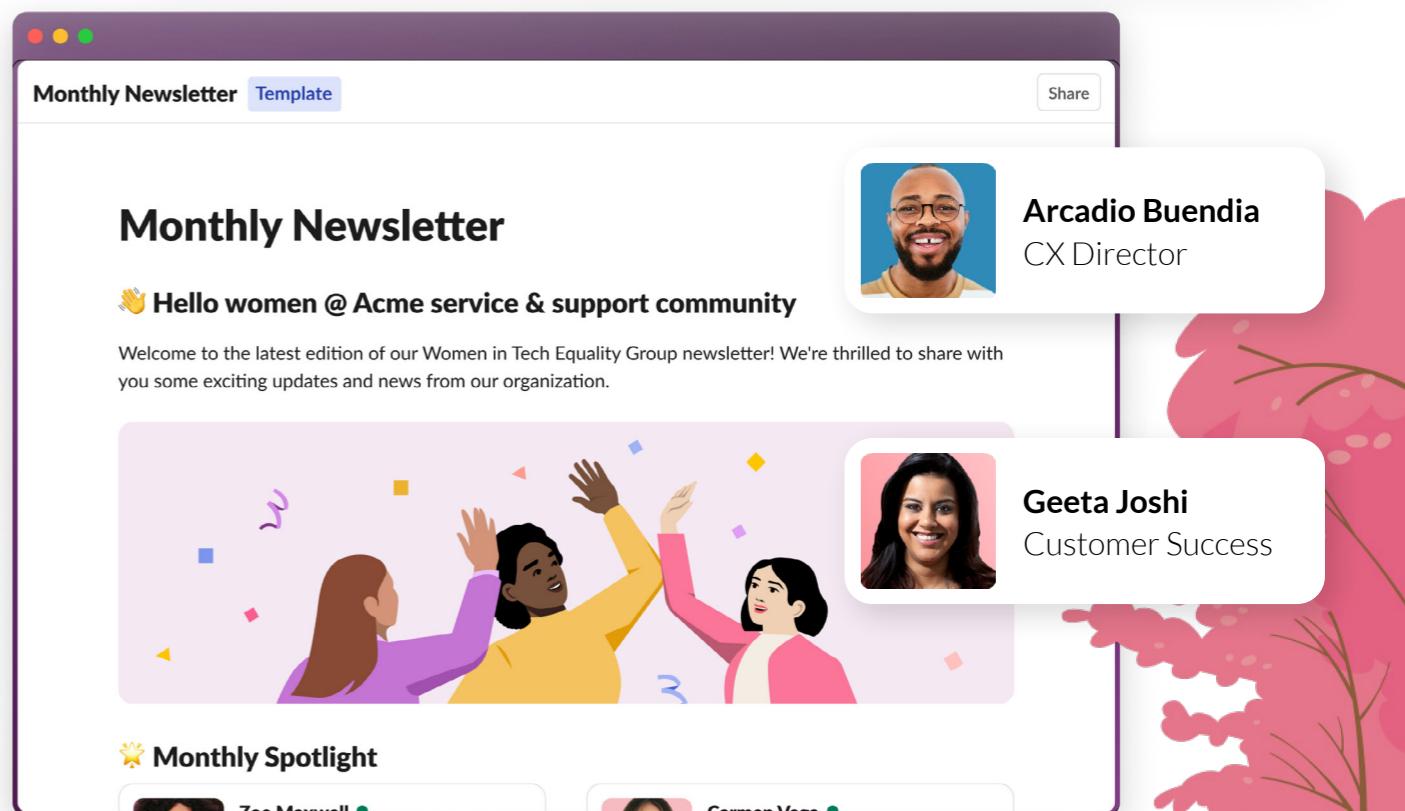
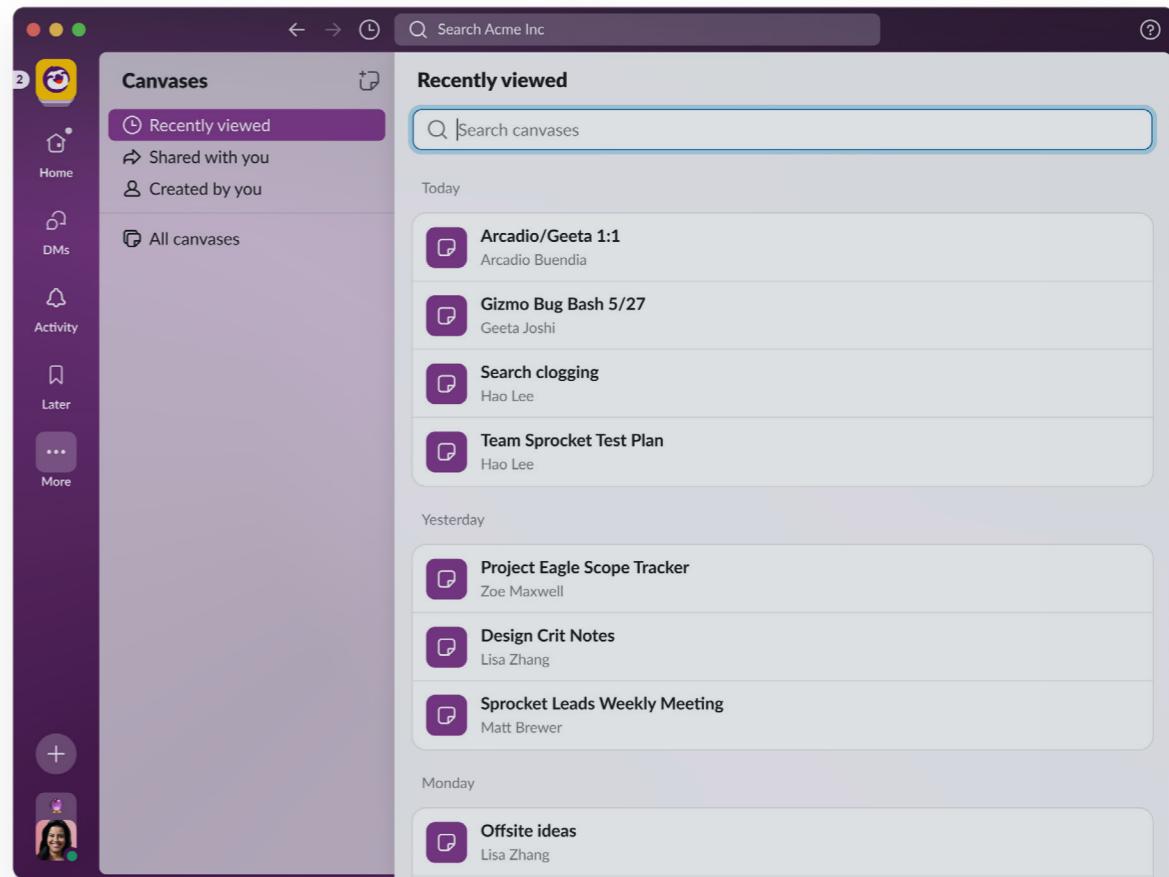
When service agents have to ping their colleagues every time they have a question, work grinds to a halt. Thanks to Slack's powerful [search](#), Salesforce's service agents rarely ask repetitive questions. They find what they're looking for in Slack.

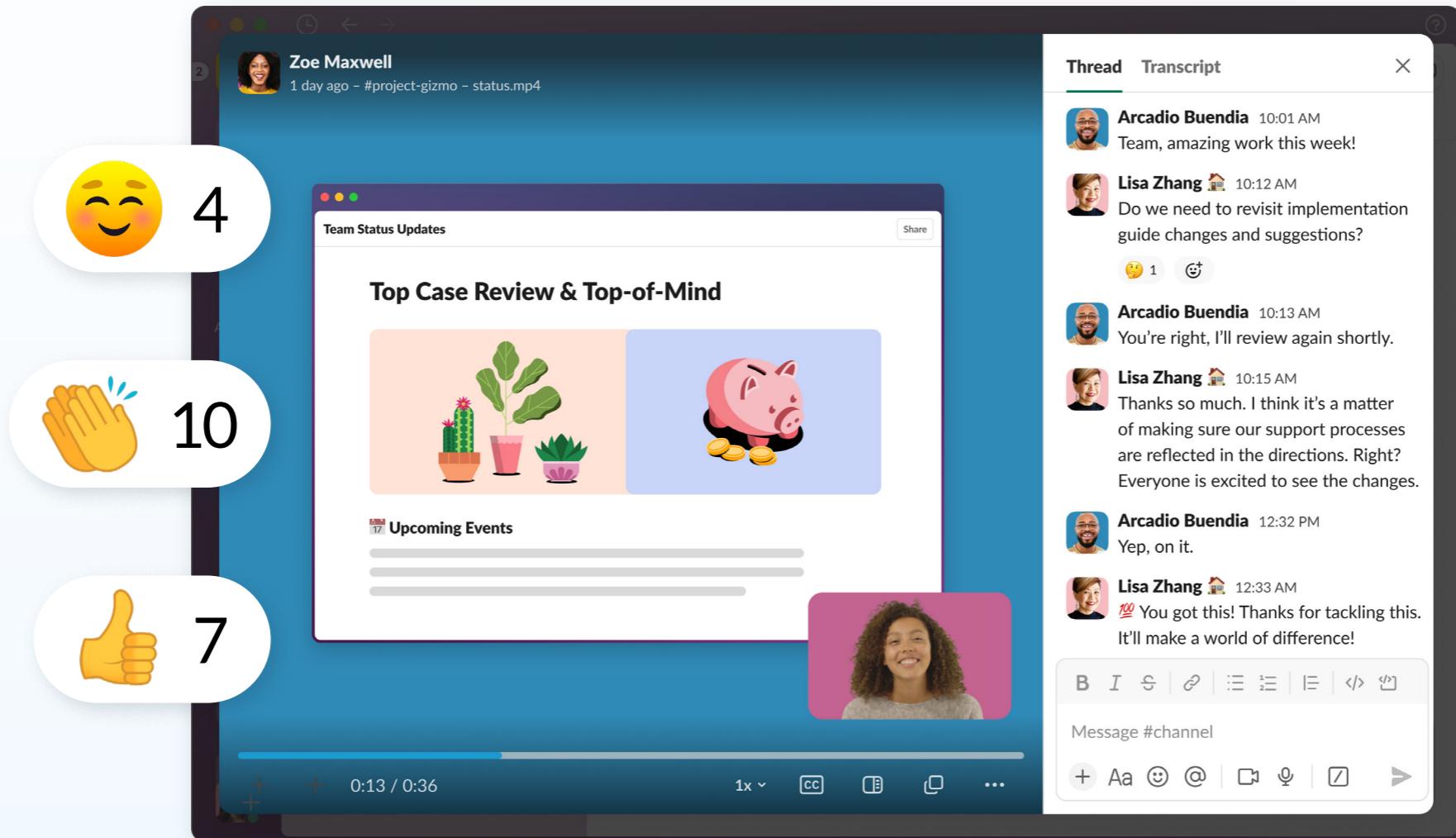
Slack channels create a record of past conversations and decisions, making it easy to share knowledge across teams. Managers can pin important messages in Slack channels so employees know where to find the information they need, when they need it.

[Slack canvases](#) enhance real-time collaboration between agents in channels by offering an evergreen place to organize and share information. Paired with Slack's flexible platform, agents can embed workflows in a canvas, increasing their discoverability while providing more context on how they can be used.

[Tamara Carpenter](#), Director of Customer Experience at Salesforce, uses canvases to track action items to reference during team meetings. She also creates canvases for each of her direct reports that she can update during one-on-ones.

"Slack is a repository for information," Carpenter said. "You know where to go to get the right information you need to collaborate. You don't have these threads that go on forever, like in email."





Sometimes information makes more sense when someone shares it verbally or when it's accompanied by visuals. With [Slack clips](#), service agents can easily create and share audio, video and screen recordings within a Slack channel or direct message that teammates can watch at their convenience.

Roth has found that sharing clips in channels is a particularly powerful way to communicate with his organization. Sharing videos in Slack provides a more conversational and engaging approach to deliver information than email or messaging apps.

Most Fridays, Roth posts a brief video clip for his team. These clips are two to three minutes long and include status updates and top-of-mind information.

"These videos receive more engagement and allow for a more personal, impactful dialogue than other communications methods we've used in the past," he said.



The screenshot shows the Slack desktop application interface. At the top, there's a search bar with the query "gizmo". Below the search bar, the header displays "Messages 2,408", "Files 23", "Channels 6", and "People 2". On the left, a sidebar menu includes "Home" (2 notifications), "DMS" (3 notifications), "Activity" (2 notifications), "Later", "...", and "More". The main content area shows a search result for "#proj-gizmo-support". A message from Lisa Zhang on Jan 5th says: "Welcome to #proj-gizmo-support. Our kickoff is scheduled for Wednesday at 11 AM. We'll drop some pre-read materials in channel the day before, so y'all can prepare questions. See you then!" Below this is a message from Harry Boone on Yesterday: "I always wondered why y'all landed on gizmo!". A "Today" section follows, containing a message from Lisa Zhang on Jan 6th: "As promised, [here](#) are some materials we'd like you all to read before tomorrow's kickoff. Feel free to start sharing questions in thread. We'll answer them tomorrow." Below this message are two file attachments: "Product Specs: Project Gizmo" (Last updated by Lisa Zhang) and "Gizmo Support Requirements" (Shared by Zoe Maxwell). The bottom of the screen shows standard Slack reaction icons.

Prepare new service agents to hit the ground running.

Training new support agents takes time. At Salesforce, being able to find all the messages, files, how-tos and tickets that agents need to troubleshoot customer issues is vital to the job, and Slack makes it simple and accessible.

Having full visibility into how processes and decisions are made gives agents valuable insight into how teams work together at Salesforce. If a search for information on a certain feature led to a project channel, for example, an agent can scroll all the way to the beginning and get the details of the entire project life-cycle, including any roadblocks that appeared along the way.

Service teams also use canvases as a point of entry to quickly onboard new agents. A canvas can include channels that agents should join and links to critical docs and no-code workflows that move them through learning paths and trainings tailored to agents' needs.

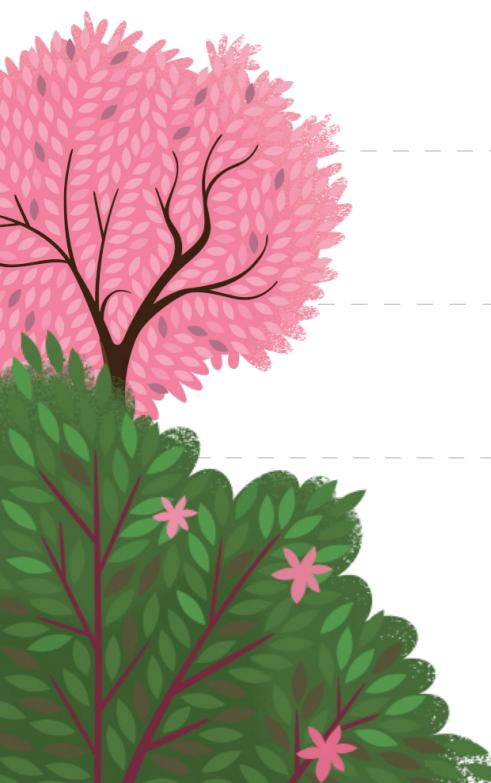
Finally, new employees can surface customer insights in Slack by integrating data from [Service Cloud](#) and [Tableau](#) as dashboards. With Slack as Salesforce's productivity platform for service, agents have the essential information they need at their fingertips from day one.

Elevate customer experience with seamless service.

Here's a scenario that will sound familiar to anyone who's had to make a support call. You speak with one agent who isn't able to resolve your problem, so they pass you up the chain of command to more senior agents. Every time you get passed on, you have to describe your issue all over again. If you've ever experienced this kind of support, you know how frustrating it can be on the customer side.

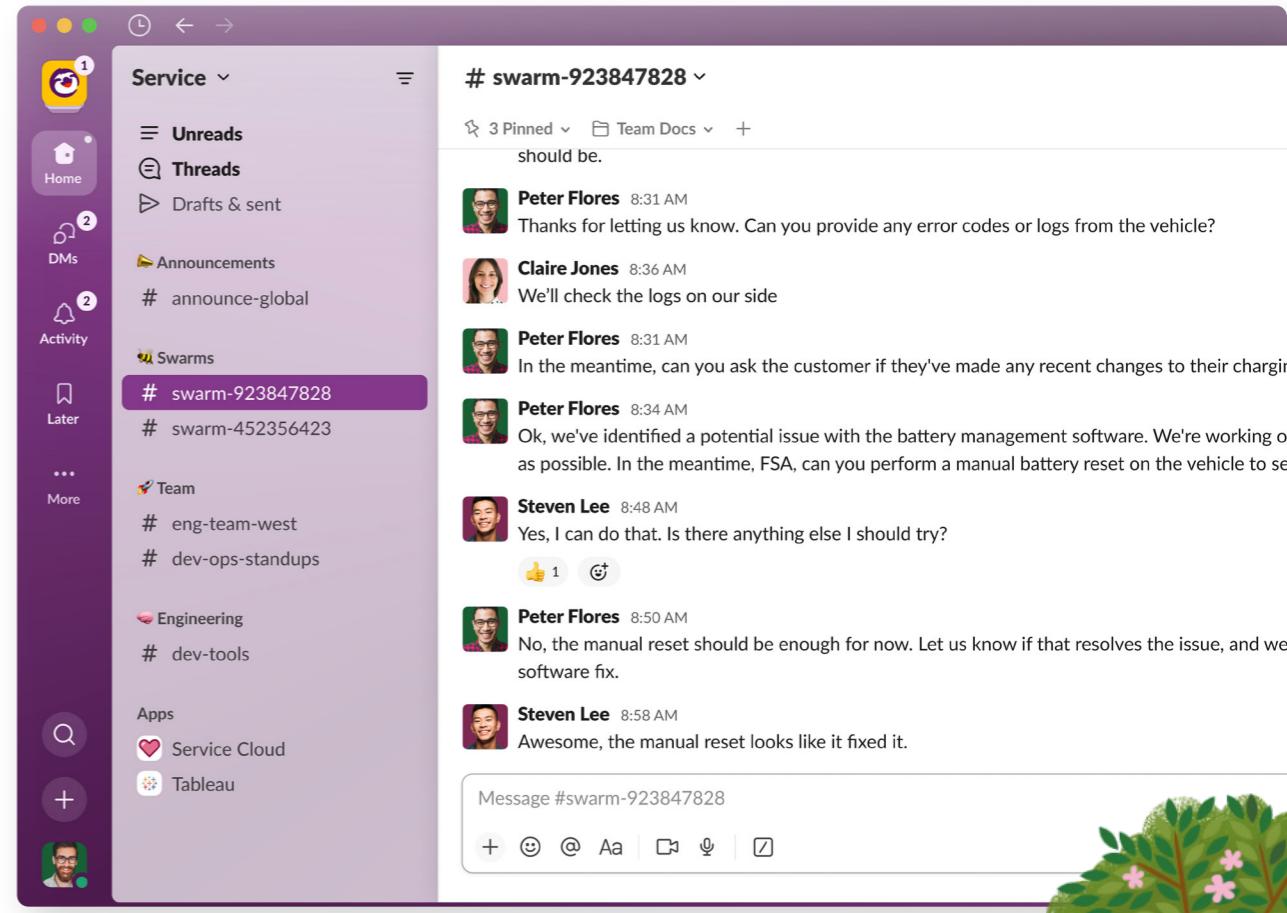
The old way of resolving issues creates frustration for service agents, too. Multiple handoffs force agents to spend more time on cases they aren't qualified to solve, which takes time away from their primary area of expertise. Transferring cases also limits opportunities to learn from teammates.

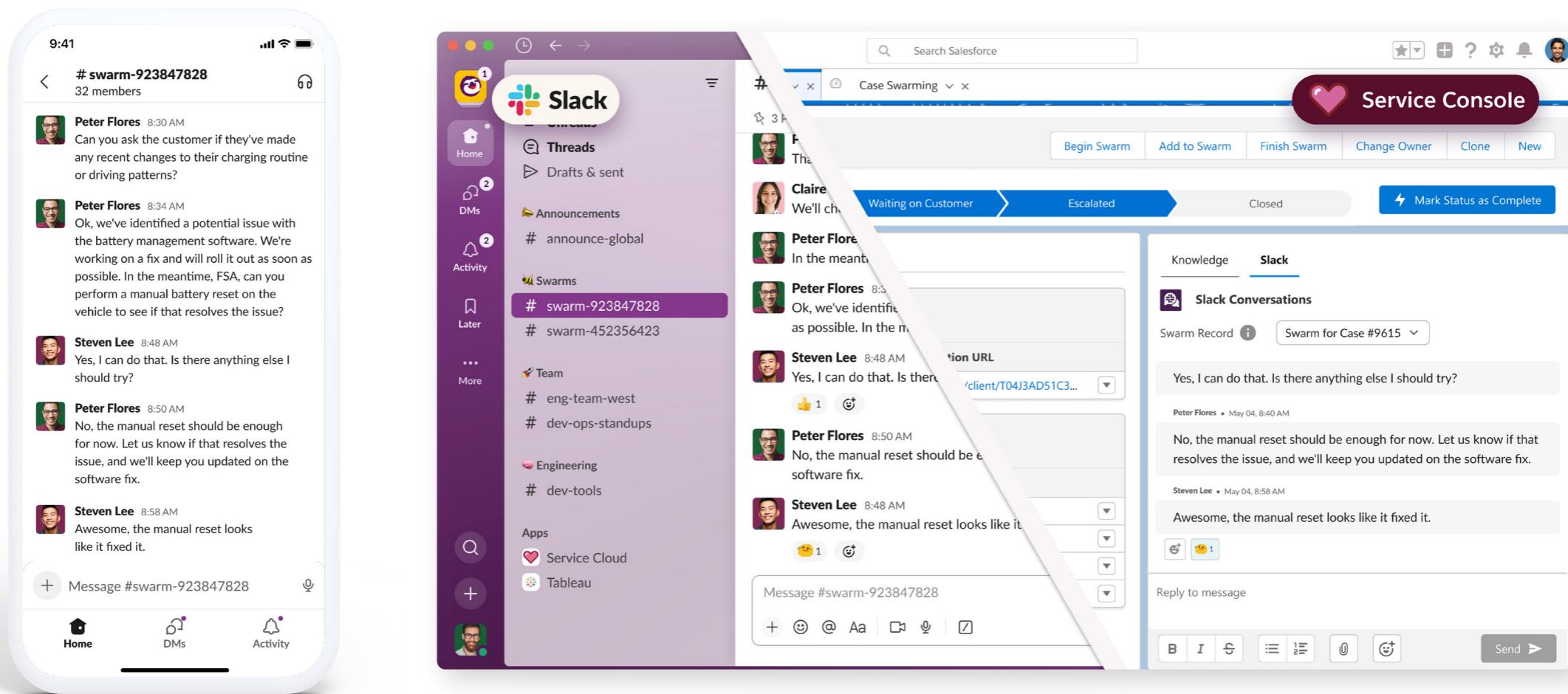
This is where [swarming](#) offers a better way. Swarming brings the entire support team together in Slack to help solve customers'



complex problems. With swarming, a case owner remains the primary agent for the case's life-cycle. The key difference is agents can easily access and collaborate with appropriate experts within the company.

Slack allows support pods to resolve major issues together quickly through the use of Salesforce's Expert Finder tool in Service Cloud. Expert Finder is embedded in the Slack swarming workflow and helps connect service teams automatically to the right swarm experts based on skills, availability, and capacity. And with the [field service mobile app](#), field service technicians have all the information they need to deliver complete service from anywhere.



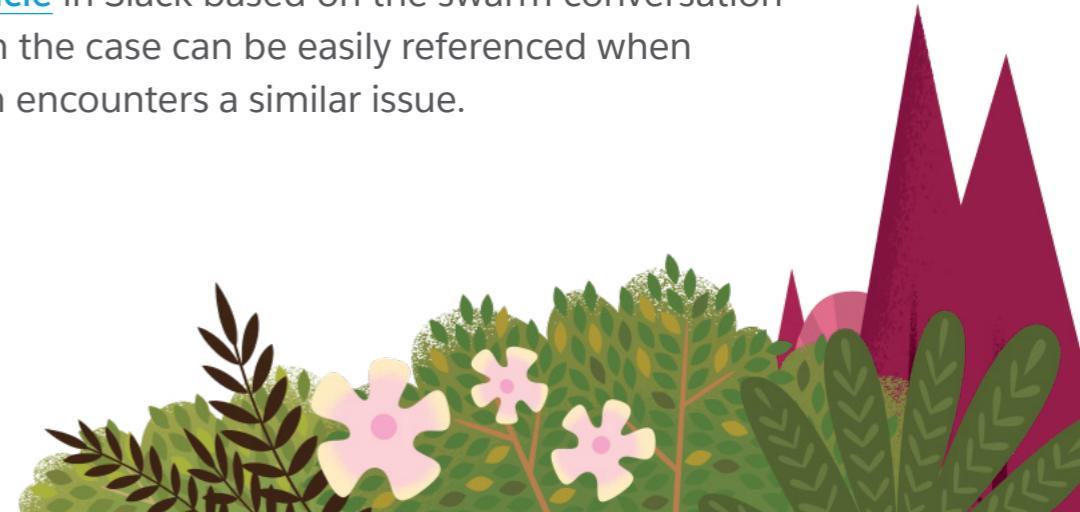


Here's how it works: If an engineer needs help on a case, they initiate a swarm request in Service Cloud and select the Expert Finder tool when prompted. The swarm is created and the workflow automatically brings in the appropriate engineers, pods, and cross-functional subject-matter experts through Slack channels to address the case.

Slack's integration with Service Cloud reduces context switching between the two tools because conversations about the case can happen in the Service Cloud Console

or Slack interchangeably. Users can quickly add information discussed in Slack to the case details in Salesforce so important context doesn't get lost.

When a case is resolved, users can create a Salesforce [knowledge article](#) in Slack based on the swarm conversation so lessons from the case can be easily referenced when another person encounters a similar issue.



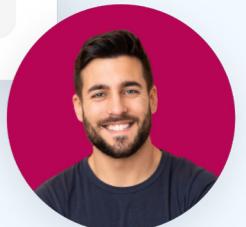
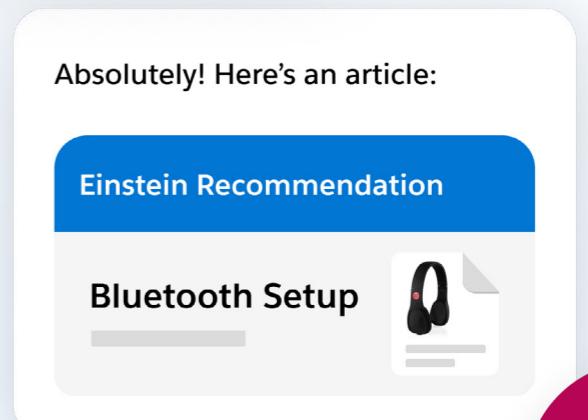
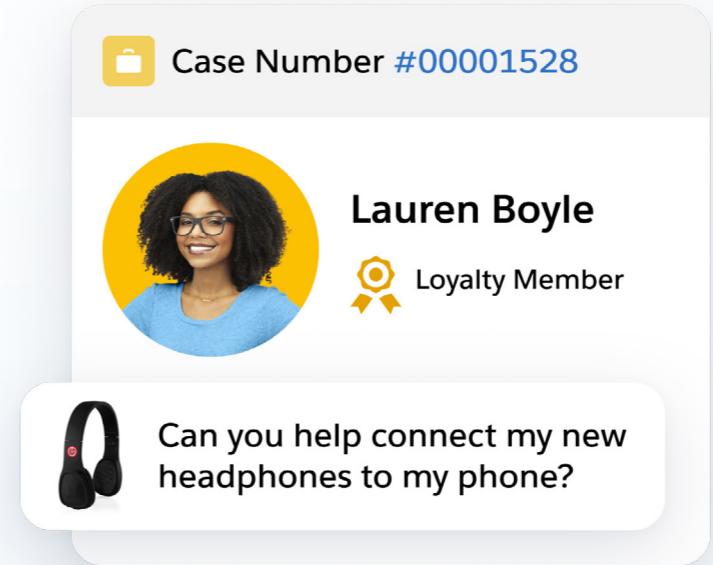
Slack bots expand automation processes even further. For instance, customers of Salesforce's [Signature Success Plan](#) receive, among other benefits, Salesforce's fastest support response time for business-stopping cases – just 15 minutes. The Slack SevOne bot helps service teams resolve urgent issues quickly, and helps track every minute in Slack so agents can analyze how long it took to reach an expert.

"We receive thousands of cases, and many require us to act with urgency," said [Sanjeev Balakrishnan](#), SVP of Customer Support at Salesforce. "This means bringing in the right expertise from different departments to troubleshoot cases. Slack has been a game changer in this space, and allows us to move quickly in order to address customers' concerns."

“After we implemented swarming, our experts resolved cases that had been open for 90-plus days. We're talking about cases that had been transferred all around the world and back again. For one particular case, we realized that the issue required three experts with different tool knowledge and skills collaborating together. Once we pulled the right experts in, we were able to resolve that case in under 48 hours, and the customer was elated.



Tamara Carpenter,
Director,
Customer Experience,
Salesforce





Do more by collaborating with partners in Slack Connect.

Salesforce works with several external partners to deliver its products to customers. But instead of relying on email or messaging tools to collaborate, teams use [Slack Connect](#) channels, which extend all the same benefits of Slack's enterprise-level security, integrations and workflows to external partners. If a customer reports a specific technical issue, for example, teams can work with one of their partners in a dedicated Slack Connect channel to resolve it quickly.

Working with external partners in Slack Connect helps service teams finish jobs faster. According to Slack's internal data, customer support teams using Slack Connect see a 64% decrease in backlog tickets.

Backlog tickets decrease by 64%.*

*Slack internal data



9:41

ext-gizmo-games
123 members

cc: @Sam @Harry @David @Lee
Canvas ▾

Gizmo Games Success Plan
Created by Zoe Maxwell today

- Overview
- Stakeholders
- Success Criteria
- Project Tracker
- Resources

Today

Harry Boone 4:24 PM
@Kristin, just received the signed envelope.
Excited to continue our partnership!

Docusign
Project_Gizmo_SOW_09202023
Envelope has been completed
[Review Document](#)

5 external people

Home DMs Activity

Drive connection and community from anywhere.

Whether agents are working across time zones or side by side, Slack empowers everyone to learn and connect while they're on the go. This flexibility allows the Salesforce support team to spend more time focused on customers.

Slack has also helped foster greater community within Salesforce. Since adopting Slack, Salesforce leaders have seen employee engagement increase. Channels dedicated to kudos and positive feedback from customers help employees feel recognized and appreciated.

“Having a persistent channel to engage across our global customer support organization has been really powerful.

It’s brought us closer together, through and beyond the pandemic,” Roth said. “The way Slack encourages collaboration and authentic, personal interactions has improved the way our teams work with each other, and the automation options have helped us build the speed and scale we need to accelerate success for our customers.”



Slack unlocks your productivity potential.

Today's customers expect a frictionless experience. Slack helps connect experts worldwide and gives the entire service team the right tools, automation, and conversations they need to provide standout support. Contact our sales team to learn how you can unlock your productivity potential.

[Contact our sales team](#)

