

Salesforce Assignment

◆ Phase 1: Setting Up Salesforce Service Cloud

1 Enable Service Cloud Features

Go to **Setup** in Salesforce and enable the following features:

- ✓ **Case Management** – Track student queries & assign them to support agents.
- ✓ **Omni-Channel** – Automatically distribute cases to available agents.
- ✓ **Knowledge Base** – Create FAQs, guides, and self-help articles.
- ✓ **Live Chat & Chatbots** – Provide instant responses to common queries.

2 Customize Support Case Management

✦ **Create Custom Case Fields:** Add fields like Course Name, Subscription Plan, Query Type (Technical, Billing, General).

✦ **Define Case Statuses:** Open, In Progress, Escalated, Resolved.

✦ **Automate Case Routing:**

- Go to **Setup** → **Omni-Channel Routing**
- Assign cases based on keywords (e.g., "payment issue" goes to Billing Team).

3 Enable Self-Service Portal for Customers

1 Go to **Experience Cloud** → **Create a New Site**.

2 Select **Customer Service Template**.

3 Customize pages with:

- **Knowledge Base** for FAQs.
 - **Case Creation Form** for submitting tickets.
 - **Live Chat Widget** for real-time help.
- 4 Publish the portal and link it to your website.

◆ Phase 2: Implement AI & Automation for Efficiency

4 Configure Einstein AI for Case Predictions

✦ **Enable Einstein Case Classification:**

- Go to **Einstein Setup** and turn on **Einstein Case Routing**.
- Train AI using historical support tickets.
 - ✦ **Enable Einstein Article Recommendations:**
- AI suggests relevant knowledge articles based on student queries.

5 Automate Customer Follow-Ups

- ✓ **Create an Email Template** in Salesforce to send a follow-up after issue resolution.
- ✓ **Set Up a Process Builder Workflow:**
 - If **Case Status = Resolved**, send an email after 24 hours.
 - If **No Response**, auto-close after 3 days.

◆ Phase 3: Integrate Sales & Learning Management System (LMS)

6 Connect Salesforce with LMS (Thinkific/Moodle/Teachable)

- ✦ Use **Salesforce API or Zapier** to sync course progress, certification, and enrollment status.
- ✦ When a student completes a course, Salesforce updates their record.

7 Build a Personalized Course Recommendation System

- ✓ Use **Einstein Analytics** to analyze students' past courses.
- ✓ Send personalized course recommendations via email.

◆ Phase 4: Reporting & Optimization

8 Set Up Real-Time Dashboards for Support Performance

- ✓ Go to **Reports** → **Create New Dashboard**.
 - ✓ Track:
 - **Avg. Response Time**
 - **Cases Resolved per Agent**
 - **Customer Satisfaction Score**
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✓ **Final Outcome**

- ✓ **Automated Support Ticketing** (Faster issue resolution).
- ✓ **AI-Driven Insights** (Improved student engagement & recommendations).
- ✓ **Personalized Customer Experience** (Better course suggestions).