Intelligent Case Routing for Faster Customer Support

Industry: Customer Support / IT Services
Project Type: B2C Salesforce Service Cloud Implementation
Target Users: Support Agents, Support Managers, and Customers

Problem Statement:
Many businesses face delays in resolving customer issues because support cases are not routed efficiently. Currently, cases are manually assigned or routed using basic rules (like by region or product), which leads to:
- Longer response times
- Uneven workload distribution among support agents
- Decreased customer satisfaction

Solution:
Implement Salesforce Service Cloud to:
- Capture cases from multiple channels (email, web form, chatbot)
- Automate case assignment using rules, queues, and skill-based routing
- Balance workload based on agent availability and expertise
- Notify customers automatically about updates
- Provide real-time dashboards for managers

Use Cases:
1. **Case Capture:** Multi-channel case collection with auto record creation
2. **Case Assignment:** Rule-based and skill-based intelligent routing
3. **Customer Notifications:** Automated updates via email/SMS
4. **Case Resolution Tracking:** SLA compliance, escalation alerts
5. **Reporting & Dashboards:** Real-time performance monitoring

Expected Outcomes:
- 30–40% faster case resolution
- Better SLA compliance & response time
- Balanced agent workload, reduced burnout
- Higher customer satisfaction (CSAT) & retention
- Real-time, data-driven managerial decisions

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering
- Conduct workshops and interviews with support agents, managers, and customers.
- Collect data on current case handling process, resolution time, SLA compliance, and CSAT.
- Identify customer-preferred communication channels (email, web, chatbot, phone).

2. Stakeholder Analysis
- **Support Agents:** Need balanced workloads and clarity on priorities.
- **Support Managers:** Need dashboards, SLA tracking, and workload monitoring.
- **Customers:** Expect quick resolutions and transparent updates.
- **Business Owners:** Focus on reducing costs and improving retention.

3. Business Process Mapping
- Map current case lifecycle from creation to closure.
- Identify manual steps and bottlenecks.
- Design future-state flow using Salesforce automation (assignment rules, queues, Omni-Channel

routing).

4. Industry-specific Use Case Analysis
- Analyze practices in leading B2C service companies.
- Benchmark response times, resolution times, and CSAT scores.
- Ensure compliance with escalation handling and SLA standards.

5. AppExchange Exploration
- Explore Salesforce AppExchange for complementary apps:
• Omni-Channel Supervisor (real-time workload monitoring)
• Case Merge Premium (duplicate case handling)
• Survey tools for CSAT feedback
- Select apps to reduce development effort and enhance functionality.