

INDUSTRY | HEALTHCARE

Healthcare tech company



This company provides a platform that allows healthcare facilities to find licensed and certified professionals to fill available shifts. Leveraging marketplace dynamics and deep industry knowledge, the company is enabling direct connections between facilities and healthcare professionals.

Challenge

The client faced challenges with their existing Einstein Bots, which were unable to dynamically access and answer questions from their public Knowledge Base. This required significant ongoing maintenance to ensure the bots remained up-to-date as knowledge content changed. Additionally, they struggled with a manual process for intake of cases related to missing payments, which was inefficient and time-consuming.

- Existing Einstein Bots lacked the ability to dynamically retrieve and respond to questions based on the latest Knowledge Base content.
- Frequent updates to the bot's dialogs were necessary, resulting in a significant maintenance burden.
- The process for handling missing payment cases was entirely manual, leading to inefficiencies and delays in resolution.

Solution

To address their challenges, we implemented the following solutions:

- The existing Einstein Bot was updated to seamlessly transfer inquiries related to missing pay to an External Agentforce Service Agent.
- The Service Agent dynamically retrieves information from the public Knowledge Base to provide up-to-date, accurate answers to customer questions.
- The solution automates the intake of cases related to missing payments, reducing the manual effort and streamlining the process.
- The Service Agent is capable of handling inquiries efficiently, minimizing the need for ongoing maintenance and ensuring scalability.

PRODUCTS USED



Agentforce



Service Cloud

Outcome

By the end of the project, our client could:

- **Automate case** intake for missing payments, eliminating the need for manual processes.
- Provide dynamic, **real-time responses** to customer inquiries by integrating with their public Knowledge Base.
- **Minimize ongoing maintenance** of bot dialogs, as the system adapts to updated information automatically.
- **Streamline support workflows**, allowing customers to resolve issues quickly and reducing the burden on customer service teams.

