

INDUSTRY | TECHNOLOGY

Tech company



This company is a growing organization of successful entrepreneurs from a variety of backgrounds who are passionate about helping other business leaders succeed. The power of this company is that it is real world, simple and practical.

Challenge

The client faced limitations with their current Einstein Bot, which relies on a decision-tree-based model rather than an open-ended natural language approach. As a result, many users were unable to find answers efficiently, leading to a large number of cases being created—cases that could have been solved if users had easier access to the knowledge base. The challenge was to enhance the bot's ability to handle open-ended queries and better guide users to self-service solutions.

- Limited decision-tree model restricting the bot's ability to handle open-ended, natural language queries.
- High volume of cases being created that could be resolved with quicker, direct access to the knowledge base.
- Inefficient user experience, with customers not easily finding the information they needed.
- Increased support load due to unnecessary case creation, impacting overall service efficiency.

Solution

To improve user experience and case management, we implemented an Agentforce solution that:

- **Natural Chat Experience** – Replaces the decision-tree-based Einstein Bot with a more seamless, open-ended natural language model.
- **Knowledge Inquiries and Case Management** – Handles both knowledge inquiries and case creation/updates, providing users with faster, more efficient resolutions.
- **Integrates with Existing Processes** – Smoothly integrates with pre-defined processes, including matching email addresses to existing contacts.
- **Creates New Leads** – Automatically creates new leads when no matching contact is found during case creation, ensuring proper tracking and follow-up.
- **Reduces Case Creation** – Helps users find answers quickly, reducing the number of unnecessary cases being created.

PRODUCTS USED



Agentforce



Salesforce

Outcome

By the end of the project, our client could:

- **Enhance User Experience** – Provide a more intuitive, open-ended chat experience for users seeking knowledge or needing to create/update cases.
- **Reduce Case Creation** – Enable users to find answers more efficiently, significantly lowering the number of cases created for issues that could be resolved with knowledge base access.
- **Seamlessly Integrate with Existing Systems** – Ensure smooth integration with existing processes, such as matching email addresses to contacts or creating new leads when necessary.
- **Improve Case Management** – Streamline case creation and updates, making it easier to manage and track customer inquiries.
- **Boost Efficiency** – Enhance the overall efficiency of support teams by automating responses to common inquiries and reducing manual case handling.

