

INDUSTRY | EMPLOYEE BENEFITS  
ADMINISTRATION AND TECHNOLOGY

# Employee benefits company



This company strives to make employee benefits simpler, smarter, and more accessible. They offer innovative solutions, including HSAs, FSAs, HRAs, COBRA, Commuter benefits, and more, all designed to help employees take full advantage of their benefits while saving time and money.

### Challenge

The client aimed to implement an agent capable of offering personalized interactions on both their public-facing and logged-in sites. The challenge was to create a solution that could answer general FAQs, handle case management, and efficiently escalate issues when needed. The goal was to ensure a seamless experience for both prospective and current clients, while maintaining operational efficiency and customer satisfaction.

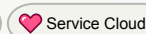
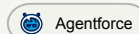
- Providing personalized interactions for both public-facing and logged-in site users.
- Efficiently answering general FAQs and addressing diverse customer needs.
- Enabling case management functionality for tracking and resolving customer inquiries.
- Handling issue escalations in a timely manner, ensuring prompt resolution.

### Solution

To streamline customer benefit inquiries and enhance support, we implemented an Agentforce solution that:

- **Simplifies Benefit Inquiries** – Answers both general and specific customer questions related to benefits.
- **Provides Self-Service Options** – Empowers customers to find answers independently via FAQs and knowledge articles.
- **Handles Complex Cases Efficiently** – Ensures rapid escalation of complex issues for more thorough support.
- **Supports Case Management** – Tracks customer inquiries by email, grouping related cases for seamless follow-up.
- **Facilitates Live Escalation** – Routes complex inquiries to live chat with support agents for real-time assistance.
- **Improves Customer Experience** – Offers a comprehensive solution for resolving inquiries quickly and efficiently.

#### PRODUCTS USED



#### Outcome

By the end of the project, our client could:

- **Streamline Benefit Inquiries** – Provide customers with quick, personalized responses to both general and specific benefit-related questions.
- **Empower Self-Service** – Allow users to find answers independently, reducing the need for live support and enhancing customer satisfaction.
- **Enhance Case Management** – Organize and track customer inquiries, ensuring efficient follow-up and resolution.
- **Improve Support Efficiency** – Quickly escalate complex issues to live agents for real-time assistance, improving issue resolution times.
- **Boost Customer Experience** – Offer a seamless support experience across both public-facing and logged-in sites, meeting customer needs with greater efficiency and personalization.

