INDUSTRY | TECHNOLOGY

IANS

TELUS Digital

IANS provides experience-based security insights for Chief Information Security Officers and their teams.

PRODUCTS USED   Agentforce   Service Cloud

Challenge

IANS faced challenges with efficiently assigning new cases to the appropriate experts. They struggled to determine which expert was best suited to handle specific topics or issues, leading to delays and inefficiencies in case resolution. The goal was to implement a solution that would streamline the assignment process, ensuring that cases are directed to the right experts based on their area of expertise.

- Difficulty in identifying the right expert for each new case.
- Inefficient case assignment process, leading to delays in resolution.
- Lack of clear criteria for matching cases to experts with specific knowledge.
- Need for a more automated and streamlined approach to improve workflow efficiency.

Solution

To streamline case assignment and improve efficiency, we implemented the following solution:

- **Service Agent Implementation –** Deployed a Service Agent with out-of-the-box Case Management actions in Production to handle case workflows.
- **Data Stream/Retriever in Sandbox –** Developed a Data Stream/Retriever based on case history in the Sandbox to enable users to access similar past cases.
- **Case Similarity Search –** Users can now find similar cases to new or existing ones, helping them reference how previous cases were handled and assigned.
- **Improved Case Resolution Efficiency –** By leveraging past case data, users can resolve new issues more quickly and accurately by referring to relevant prior cases.

Outcome

By the end of the project, IANS could:

- **Streamline Case Assignment –** Automatically match new cases to the appropriate expert based on similar past cases and expert handling history.
- **Improve Efficiency –** Resolve cases more quickly by referencing previous cases and leveraging historical data to guide solutions.
- **Enhance Case Management –** Utilize case history insights to make informed decisions about case handling, improving workflow and reducing delays.
- **Optimize Resource Allocation –** Ensure that experts are assigned cases aligned with their knowledge and expertise, improving the accuracy and speed of resolutions.
- **Boost Overall Productivity –** Reduce the time spent on case assignment and improve overall case resolution times, leading to increased team efficiency.