vicasso

A Guide to Better Case Management

in Salesforce Service Cloud

Through our decades of experience in the customer service industry, we've found that delivering exceptional service hinges on the quality of four main elements: responsiveness, utilization, personalization, and feedback. This guide details best practices for optimizing your case management in Salesforce, so you can excel in these four arenas of service.

Our guide is categorized based on what we consider the four most important elements of service success:

Responsiveness:
Treat every customer like a priority.

Utilization:
Identify needs in your support process.

Personalization:
Enhance relationships with a personal touch.

Feedback:
Leverage the customer's voice for continuous improvement.

> **For complex issues, adding more support agents doesn't always solve the problem faster. To gain speed, you need better processes and tools.**

Jim Roth, Salesforce President of Customer Success

Source: Slack, "Salesforce customer service teams exceed expectations with Slack."

About Vicasso

Vicasso adopted Salesforce Service Cloud to support our customer service team in 2004.

When it didn't fully solve our problems out-of-the-box, our in-house developers began building solutions, which proved just as valuable to other Salesforce users struggling with the same obstacles. Essentially, we were building apps within Salesforce before the AppExchange even existed.

Over the past 20 years, we've put tens of thousands of hours into solving Salesforce case management challenges and helping our customers do the same. We're dedicated to guiding businesses in the improvement of their customer service processes, using our six native Salesforce apps and our industry expertise.

vicasso
We Accelerate Service

RESPONSIVENESS

Prioritize Cases Effectively

With so many support cases, your agents' productivity is vital. Many case variables deserve consideration, but often when prioritizing cases, the latest and loudest case becomes the de facto choice. Or, support agents cherry-pick the easy-to-solve cases, at the expense of the difficult ones. Inevitably some cases will fall through the cracks. Much like making a recipe, you want to have your ingredients properly set out, like mise en place for case management. To stay productive, organize cases in Salesforce to resolve customer's issues by priority.

Automate Case Routing

Improving overall response time hinges on getting customer support cases into the right hands quickly and efficiently, and manually assigning cases is simply not scalable or consistent. If you're using Salesforce out-of-the-box, you can set assignment rules, queues, Omni-Channel routing, or visual flows to automate and optimize how cases are distributed to agents. You can also build queues based on criteria like case details, priorities, skills, and workloads.

Case Flags, our intelligent case prioritization app for Salesforce, uses **color-coded flags to prioritize workload**. It allows you to set custom rules for which cases to prioritize first, and helps support teams adhere to SLAs.

90%

of consumers rate an immediate response as important or very important when they have a customer service question.

Source: Salesforce, "The State of Service: 5th Edition."

RESPONSIVENESS

Reduce Low Value Tasks

In the future, **Agentforce** will prove reliable for offloading tedious tasks that slow agent productivity, freeing your human agents to focus on more complex cases. **Read our full article.**

Agent productivity can be significantly hindered by time-consuming administrative responsibilities like data entry, record updates, and routine processes. By automating these monotonous yet crucial tasks, organizations can empower their service teams to focus on what really matters - providing personalized support and delivering exceptional customer experiences. Automation streamlines workflows, reduces human error, and frees up agents' bandwidth to handle more high-value work.

To identify inefficiencies in your service process, shadow an agent and observe how they handle a case from start to finish. Look for bottlenecks and low-value tasks that drain productivity, such as dealing with duplicate cases, navigating multiple screens and clicks just to respond, or sifting through long related files lists.

File Slayer, Case Merge Premium, and **Case Split** are three examples of Salesforce-native apps that are designed to remove manual tasks from the case management process. They save support agents over 8 hours per week spent sifting through files list, and merging and splitting cases.

UTILIZATION

Create an Optimal Agent Workspace

Having an optimal workspace in Service Cloud for agents is crucial because it directly impacts their efficiency and the ease of their day-to-day operations. A well-designed workspace can streamline case management processes, provide easy access to relevant information, and enable agents to handle customer inquiries promptly and effectively.

To build an ideal workspace, we recommend using a **Lightning Page** layout that is clean and concise, and use **component visibility and dynamic forms** to restrict what agents see on the page layout. This ensures that the right people are seeing the right fields, components and sections - without clutter they don't need.

The **Console & Utility Bar** are powerful tools for building a unified interface with access to multiple applications and tools. The utility bar gives common productivity tools to agents on a fixed footer on the page. Ask your agents which common productivity tools they use frequently. Are they frequently taking notes or keeping a to-do list? You can enable these items and more in Lightning App Builder.

UTILIZATION

Monitor Caseloads

Keep an eye on caseloads. We've said it once and we'll say it again: stop overloading your top performers. It's how you lose them! You need an easy way to get a clear view of your team's workload, and don't be afraid to rebalance work when and where it's needed. Happier support agents create happier customer experiences.

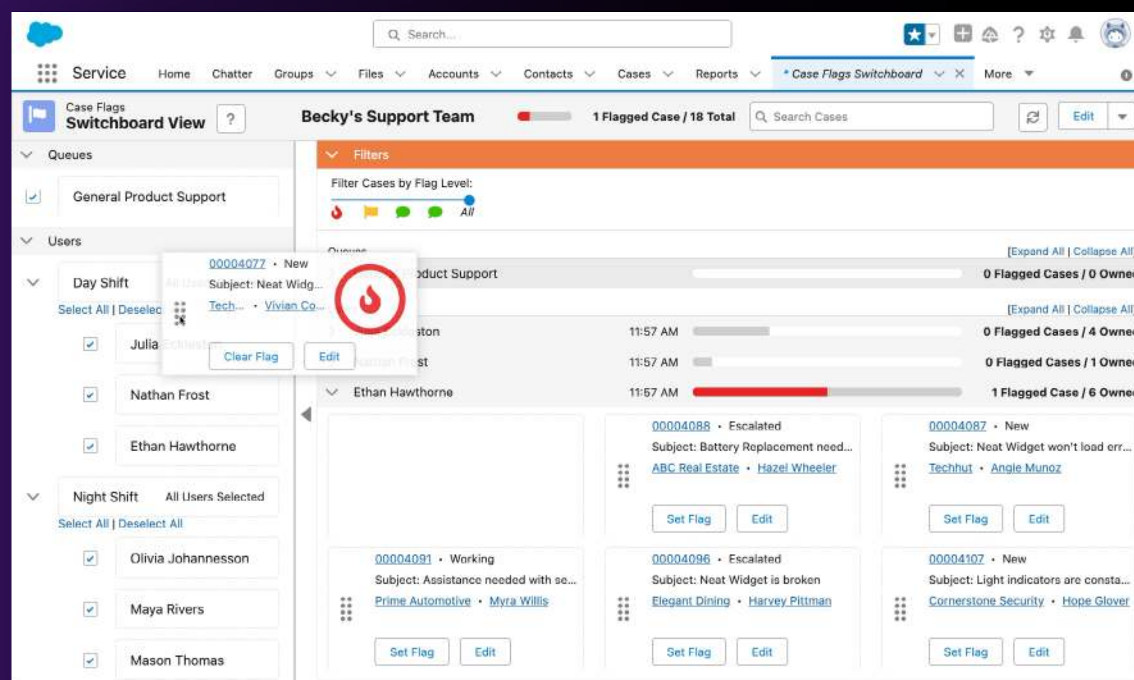
Stressed out and overworked agents will either leave, or project their frustrations directly onto your customers. ***Productivity Reports in Salesforce*** are a good starting point to get a birds-eye view our team's caseload.

74%

of employees say that having **a manager who understands their workload** is crucial to their job satisfaction and overall performance.

Source: Gallup, "The State of the American Manager: Analytics and Advice for Leaders."

Case Flags features include a Switchboard View, which gives support managers a birds-eye view of team workload and allows them to drag and drop cases to rebalance the caseload.

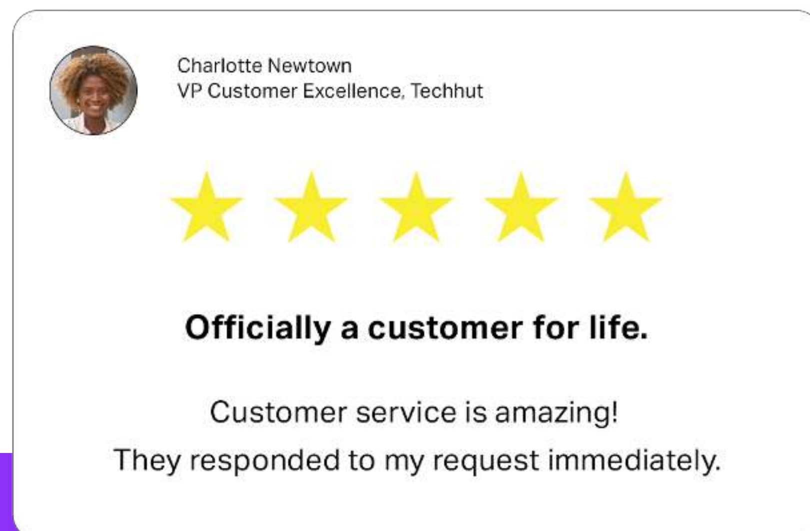


Track the Right Metrics

Typically, agents have to pick between traditional KPI metrics like First Response Time and Time to Resolution – metrics that only emphasize speed, quality, or cost (And at most, an agent can only pick two to the detriment of the other). But you can't build relationships if you only focus on KPIs. If everything is about speed, how can you expect to connect–to really personalize the experience?

To understand your team's capacity, note speed *and* quality. Perhaps one agent is handling more complicated cases while others speed through simple cases. Simply measuring "time to close" could make your most knowledgeable agents appear to be your poor performers. With access to the right metrics, such as comparing time with support to time with the customer, you can easily fix faulty processes by coaching your team to utilize their time and talent appropriately. Keep in mind, the goal is always to promote speed and attentiveness with the ultimate goal of satisfying the customer.

The most important KPI? What your customers are saying.



Simple Survey helps you to capture more feedback so you don't have to rely solely on timed metrics to identify areas for improvement in your service experience.

PERSONALIZATION

Support the Channels Your Customer Prefers

While multi-channel customer service may not typically fall under the personalization category, we think allowing customers to submit support requests through the channel of their choice is a method of personalizing the entire support process. You're honoring their personal preference, whether that be online chat, email communication, text messages, social media, or a portal.

The key is enabling and configuring the right combination of out-of-the-box and custom channel sources based on where your customers prefer to initiate support requests.

Multi-channel support sometimes leads to channel thrashing: customers submitting the same support requests across multiple channels hoping for a faster response, which can cause duplicate case chaos.

Automerge, an upgrade available to Case Merge Premium users, can detect and delete duplicate cases to save you time and money.

91%

of consumers are more likely to shop with brands that recognize, remember, and provide relevant offers and recommendations.

Source: Accenture, "Personalization Pulse Check: Three Lessons Driving Growth for Consumer Brands."

PERSONALIZATION

Keep Cases Transparent

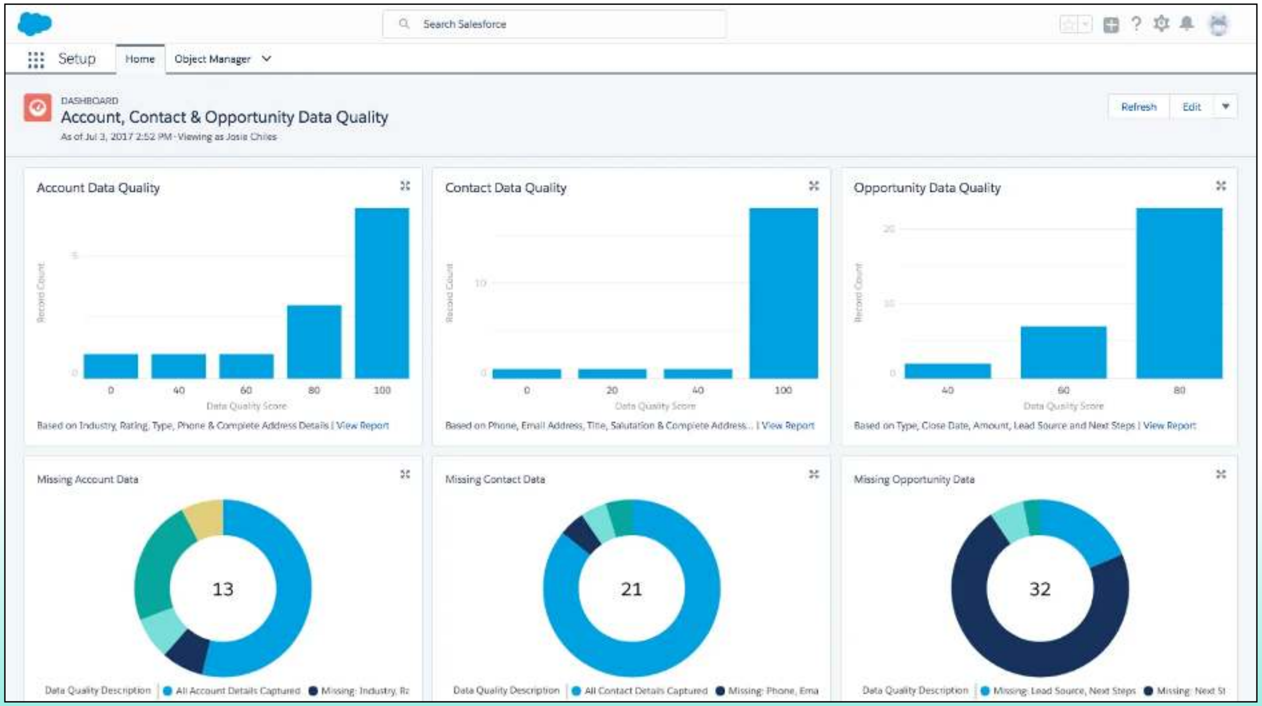
Having to re-explain your issue to a different support agent after being shuffled around the team hinders the personalization aspect of the service experience, and can make you feel like just another number in a long queue.

To maintain a seamless and personalized support experience, make sure your cases are transparent with key fields filled out, including Next Steps and Follow-up On (Date/Time). With key information, other support agents or a manager can quickly identify what is going on and the next steps, assuring an uninterrupted support experience from start to finish. In the end, the team shares a common goal: to resolve issues successfully.

Clean Case Data

Having clean, complete case data allows agents to see the full context and history of a customer's interactions. This enriched view enables agents to personalize their service approach based on the customer's specific situation, issues, and preferences. With accurate data on things like products owned, previous contacts, and case details, agents can tailor their language, knowledge sharing, and resolution steps for a more individualized experience.

While maintaining clean data, consider monitoring your org for data quality. Salesforce has an excellent free report called "Account, Contact & Opportunity Data Quality" pre-built so you can quickly isolate and fix issues. Read more at the trailhead here.

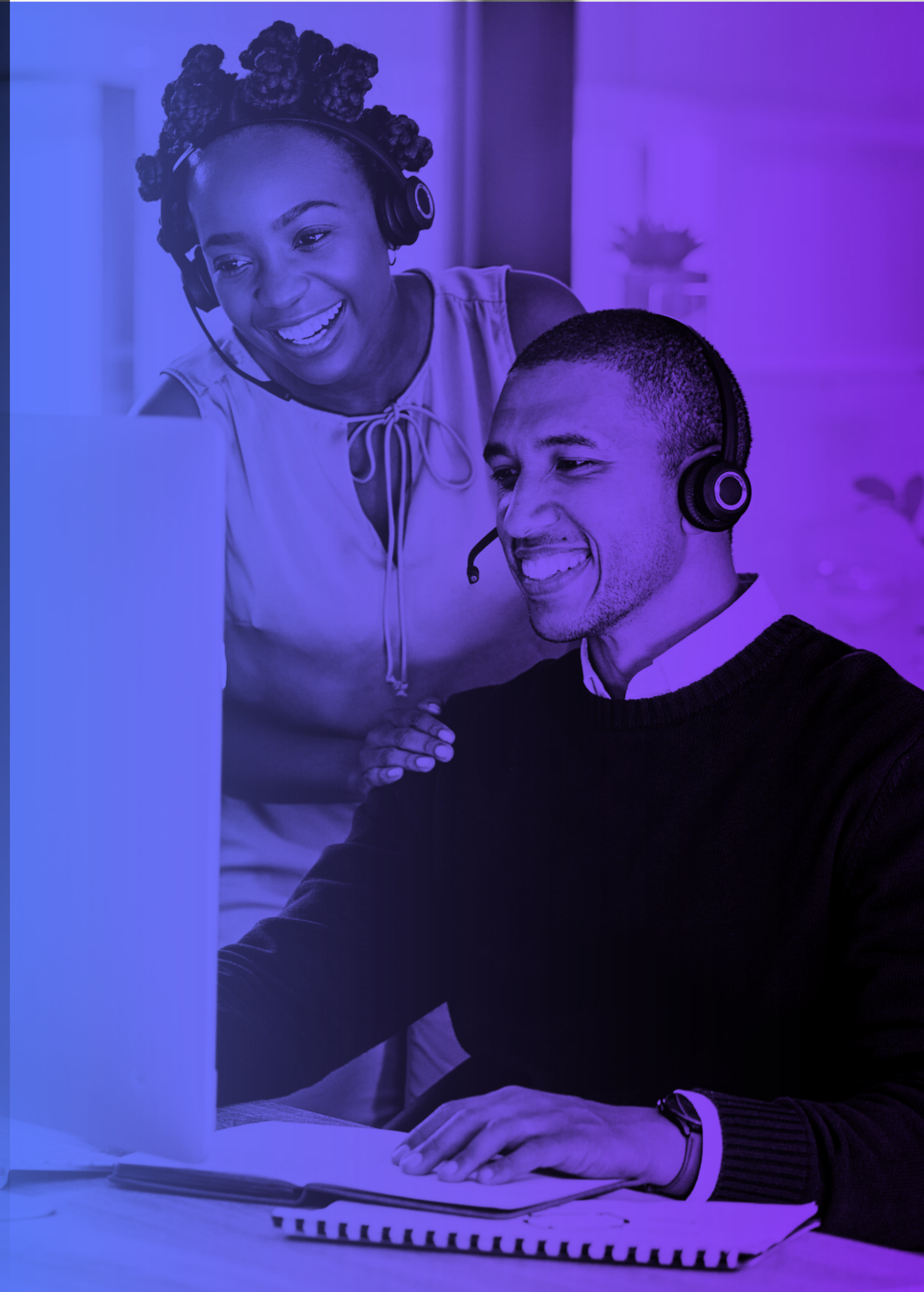


PERSONALIZATION

Maintain Consistent Communication

While consistency of communication and personalization may seem contradictory, they can actually complement each other to deliver tailored yet cohesive customer experiences. A consistent voice, language, and processes set expectations and context that personalized interactions can then build upon.

See the next page for two case management best practices that will help keep your support communications uniform.

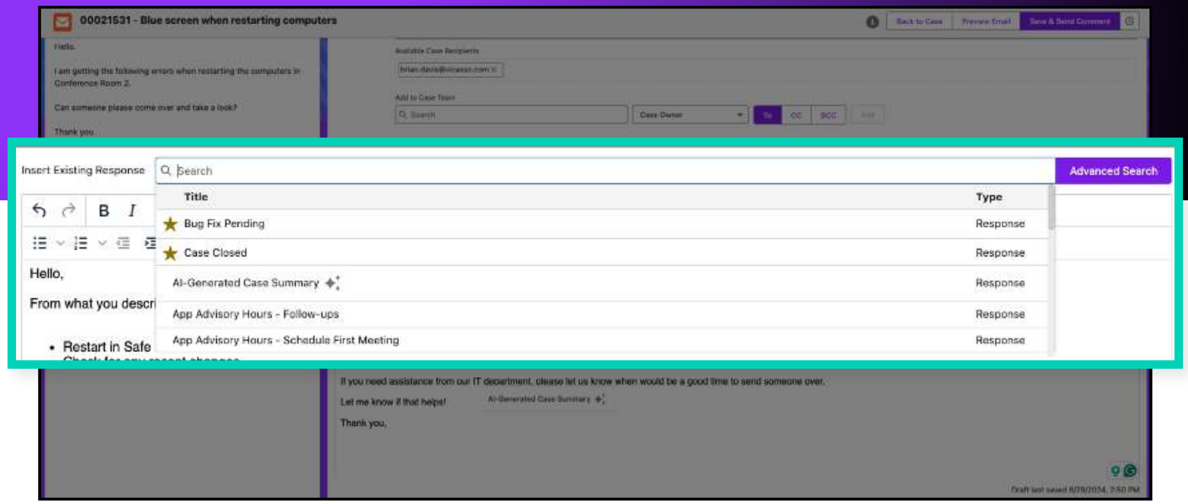


- **Encourage Knowledge Sharing**

  Information from prior cases, knowledge articles, and documentation can be immensely valuable for agents.

  If we document our cases, we have an official and trustworthy source - something agents-in-training and seasoned agents alike can trust. Documentation essentially creates new knowledge that is instantly shared across your support team.

  Best practice is to have your agents create a new piece of knowledge in the internal knowledgebase to be indirectly shared when they encounter new or existing information that helps solve an issue.



- **Simplify Knowledge Access**

  To create consistent language in customer communication, most support teams work ad hoc, cutting and pasting text from multiple windows, and searching through shared documents to find the information they need.

  Canned Responses, a feature of Email To Case Premium, allows you to create a collection of pre-written responses with appropriate formatting, in-line images, and file attachments. After inserting the response, your agents are able to personalize the content to that specific customer's needs. They're also able to insert portions of Knowledgebase articles or entire articles into their responses.

FEEDBACK

Gather Better Feedback

Feedback is a crucial element of the customer experience. Unfortunately, today's customers often suffer from "survey fatigue"–when feedback solicitations become overwhelming. And even when companies are receiving responses, they might be faced with another challenge: limited quality feedback.

Why Native?

Survey solutions that are non-native to Salesforce don't allow easy access to metrics such as surveys received per customer, which can lead to low response rates due to survey fatigue.

In Seth Godin's book, "*Permission Marketing*," he suggests delivering messages to your customers that are:

Anticipated: Engaging customers promptly is imperative for quality responses, so ask customers for feedback based on a recent action, when the interaction is top of mind. In Salesforce case management, this can look like a trigger after case closure.

Personal: Surveys directly relate to the individual, so your questions should relate genuinely to the customer and not the mass market. Most people want to know that their responses are listened to, not just another data point in a sea of metrics. This is where clean case data comes in handy!

Relevant: Feedback should be connected to the customers' experience and should benefit them somehow. An ideal scenario is a feature within your survey tool that dynamically adjusts to customer responses. Hint: Check out **Simple Survey** on the App Exchange!

FEEDBACK

Consider Customer Satisfaction Metrics

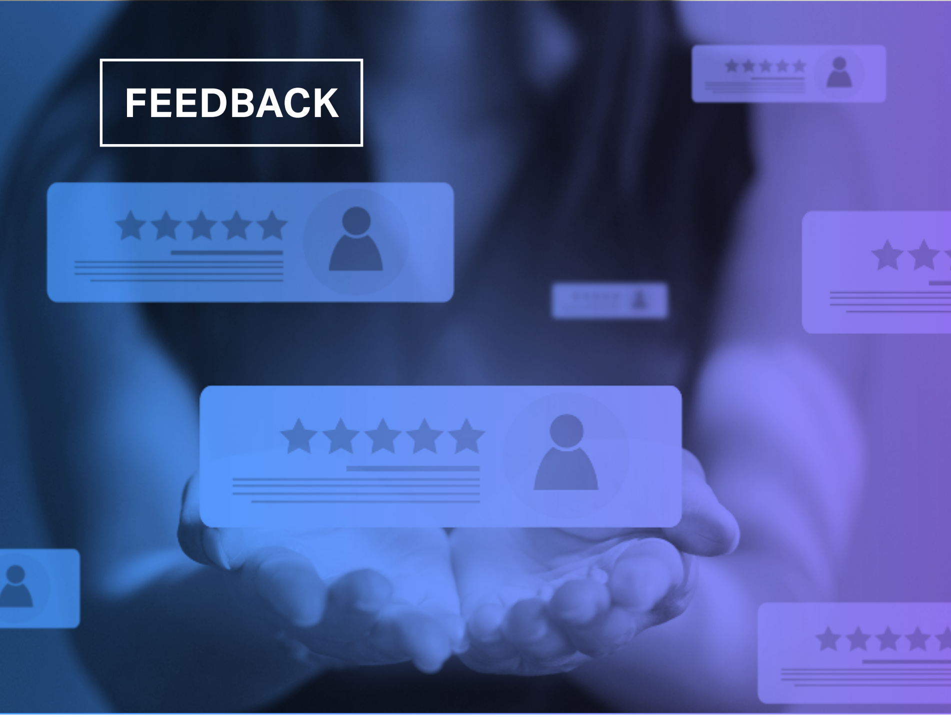
Customer feedback is the lifeblood of any successful business, providing valuable insights into customer satisfaction and loyalty. Among the numerous methods used to measure customer sentiment, CSAT (Customer Satisfaction) and NPS (Net Promoter Score) are the most widely used. While both metrics aim to evaluate customer experience, they differ significantly in their methodologies, scopes, and implications.

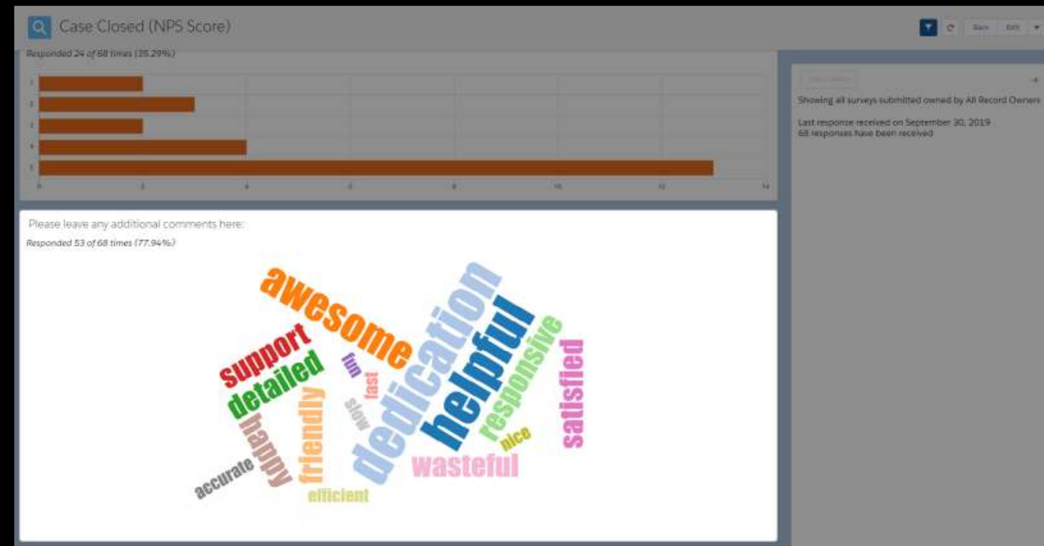
CSAT Scores:

CSAT scores are valuable for pinpointing immediate issues in customer interactions. They are particularly useful for customer service teams to gauge the effectiveness of their support and for product teams to evaluate the success of new features or updates.

NPS Scores:

NPS scores provide actionable insights into customer loyalty and the likelihood of customer referrals. They are powerful tools for understanding overall customer sentiment and identifying brand advocates who can positively impact word-of-mouth marketing.





Pre-built report from our Simple Survey app shows you trends in customer sentiment so you can tailor your follow-up to respondents.

Add Feedback Follow-Up Steps to Your Case Management Process

Don't let feedback go forgotten. Whether you are surveying customers or employees, be sure to follow up with participants to encourage future meaningful feedback. If you currently do not have a step built into your Salesforce case management process to ensure follow up after feedback is received, it's like time to create one. Following up with customers and sharing valuable information about customers will help everyone in the organization make better decisions that will best serve your customers.

This closed-loop process ensures customer feedback data is centralized, prioritized for action appropriately, and visible to teams to continuously improve service.

Conditional redirects and dynamic post-survey content in **Simple Survey** can serve as a form of automated follow-up. Based on the survey taker's response, you can show custom messages such as a coupon code, or direct them to a page such as your Google listing to leave a public review.