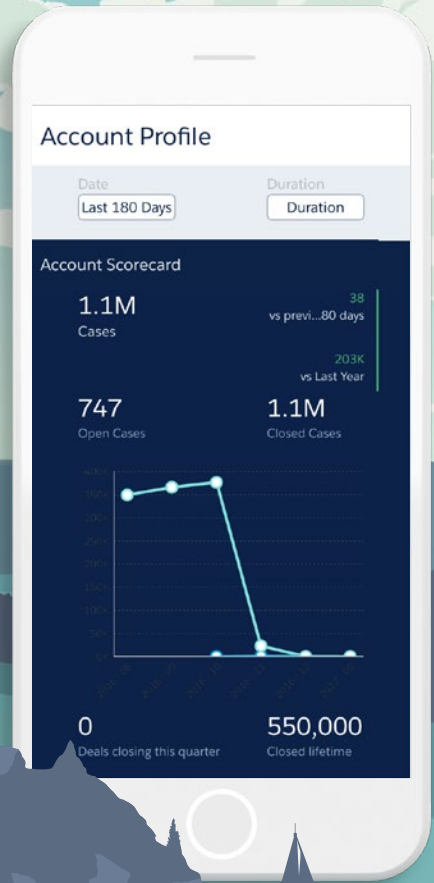




Guide to **SERVICE ANALYTICS**

Inspire smarter managers, more productive agents,
and happier customers.



How to diagnose issues, take action, and please customers with Service Analytics.

With Service Analytics, you can instantly slice and dice data without waiting for IT or analysts. Dynamic dashboards automatically populate with your Service Cloud data, giving agents and service managers a complete view of critical KPIs on any device. Service leaders get instant insight into customer satisfaction, case volume, team performance, and trends across all channels and geographies. Agents get 360-degree customer views and deeper understanding of case context, so they can deliver the right service on the right channel at the right time. And with dashboards embedded within the Lightning Service Console, they can take action in Service Cloud right from where they work.

In this guide, we'll review Service Analytics dashboards and explain how each member of your service organization can use them to deliver world-class customer service.



Service Analytics

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Introduction

WHAT YOU'LL LEARN

- ✓ How to ask new questions, interactively explore your Service Cloud data, and uncover insight and trends
- ✓ How to get a clear path through your Service Cloud data on any device
- ✓ How to drill deeper into key aspects of your business and take action directly in Service Cloud
- ✓ How to edit any Salesforce record or object and share insights with your team
- ✓ How to supercharge agent performance and proactively prevent case backlog

WHO THIS GUIDE IS FOR

Service managers get visibility into team performance, call center efficiency, channel optimization, and CSAT – all in one place, so they can create the most efficient service teams possible.

Service agents get instant access to a single view of relevant data – embedded right in the Lightning Service Console – so they can quickly deliver personalized service and be more productive.



Service Managers

Service managers are the critical link between a company's customer service goals and its frontline employees. They're responsible for training, coaching, and assessing service agents to ensure the best possible customer experience and the optimal allocation of resources across channels. Therefore, it's essential for service managers to track agent performance and activities, review channels and backlog, and keep an eye on CSAT and other key metrics.

IF YOU ARE A SERVICE MANAGER HERE ARE A FEW OF THE CHAPTERS YOU MIGHT WANT TO CHECK OUT

1. Overview

2. Open Cases

3. Agent Performance

4. Agent Activities

5. Channel Review

6. Account Profile

7. Backlog

8. CSAT

9. Knowledge

10. Telephony



Service Agents

Service agents are customer-facing ambassadors who help resolve product and service issues and ensure customer success. In order for agents to provide outstanding service, they need to understand a given customer's service history along with a basic understanding of how many cases are open and their current status. They need to be able to collaborate with other agents who have handled similar cases. And they need insights where they work, embedded in the Lightning Service Console.

THESE LIGHTNING SERVICE CONSOLE DASHBOARDS PROVIDE AGENTS WITH CRITICAL INSIGHTS ALONGSIDE THE CASES THEY'RE ACTIVELY WORKING

11. Customer Context Sidebar

12. Similar Cases Sidebar

13. Case History Sidebar

14. My Performance

15. Einstein Discovery



CHAPTER 1

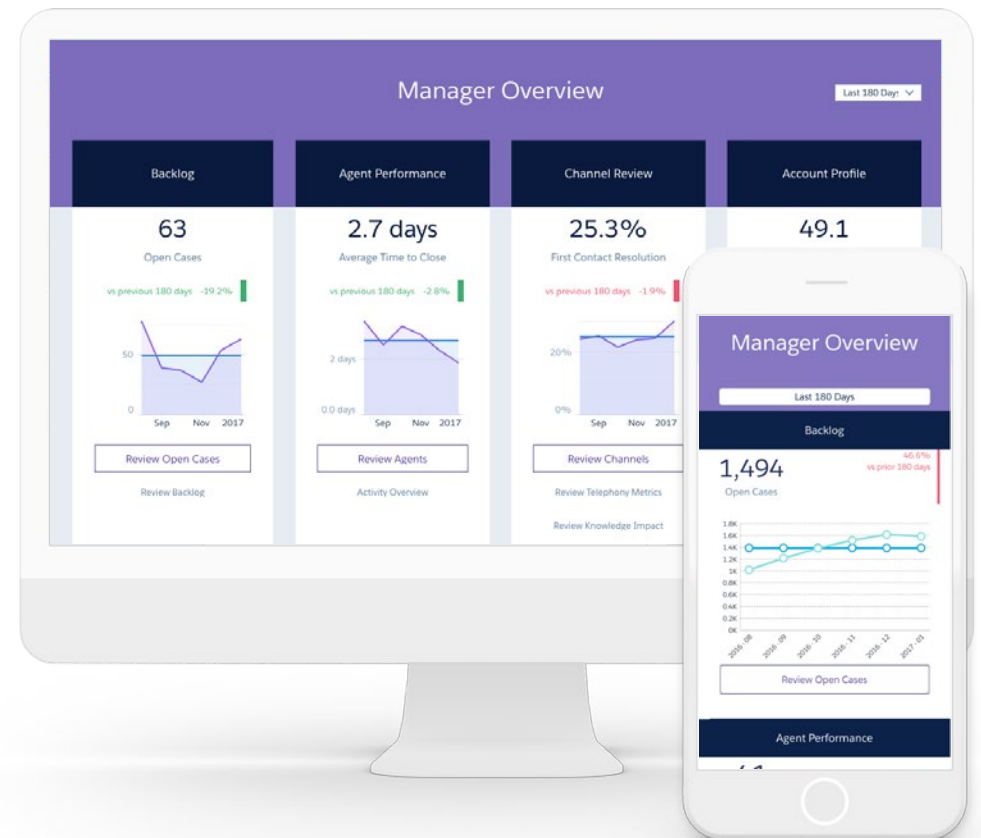
Overview

START HERE FOR A HIGH LEVEL VIEW OF THE STATE OF YOUR SERVICE

This is where great customer service begins. The Overview dashboard includes key KPIs to help you gauge the health of your service organization and clearly communicate issues that require further investigation. It also provides navigation to all other Service Analytics dashboards.

✔ WHAT YOU'LL LEARN

Is there anything I should be concerned about?
How are we tracking against average or targets?



CHAPTER 2

Open Cases

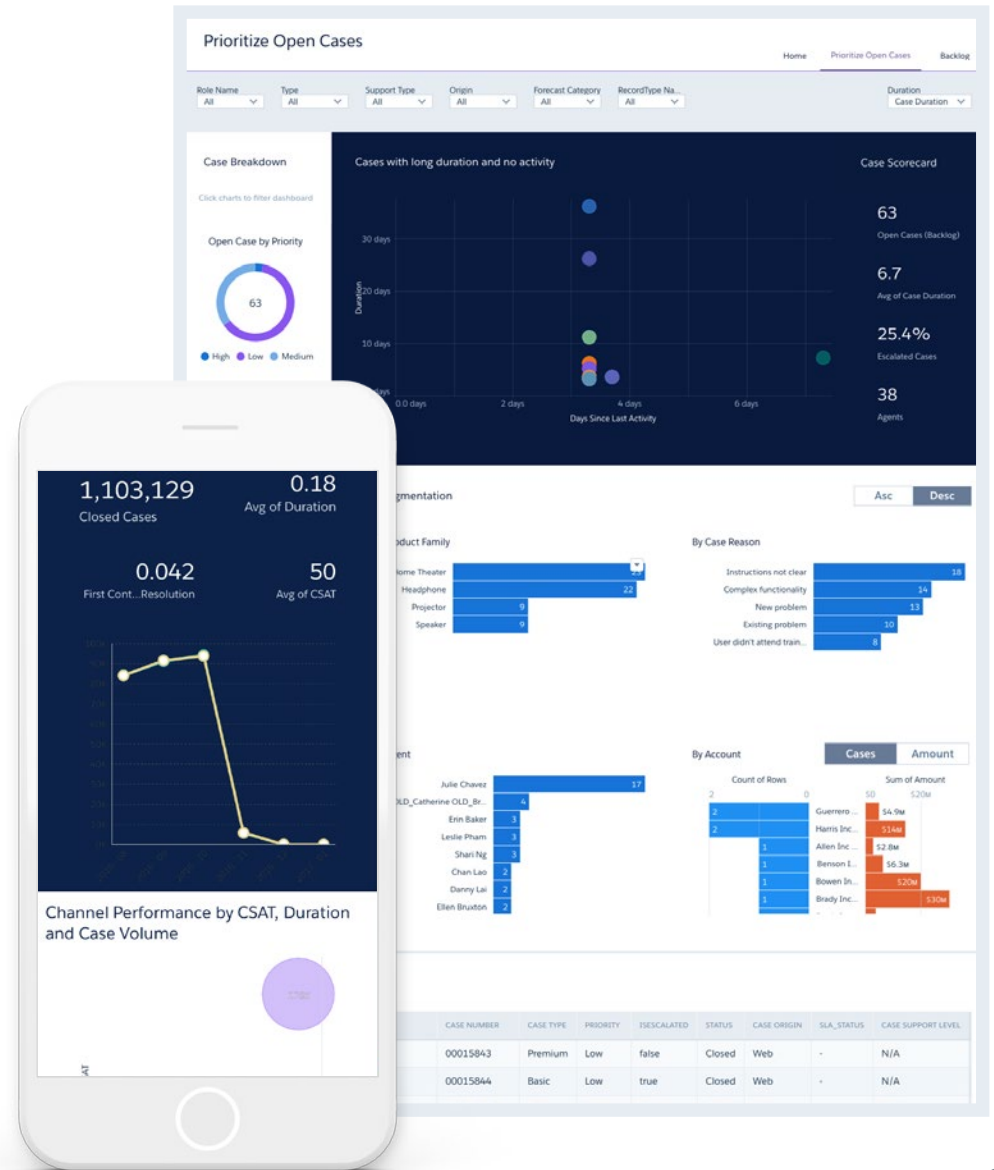
PRIORITIZE CASES AND TAKE ACTION

Look into your current open case workload, so you can prioritize efforts and take action. With the Open Cases dashboard, you can also investigate problematic cases by looking at priority, escalations, and SLA compliance, or prioritize cases by accounts and pending deals.



WHAT YOU'LL LEARN

- How many open cases do we have and what are their statuses?
- Which cases should we be focusing on?
- Who is working on critical cases?
- Do cases need to be reassigned?
- Which customer cases should we prioritize?
- What are the details of the actual cases?
- What steps can we take to optimize open cases?



CHAPTER 3

Agent Performance

IDENTIFY TOP AND BOTTOM PLAYERS

Now you can fully understand how agents and teams are performing against key activity and customer satisfaction metrics. The Agent Performance dashboard includes trends and benchmarks on agent performance that provide context, drive coaching discussions, and give recommendations on how to improve.



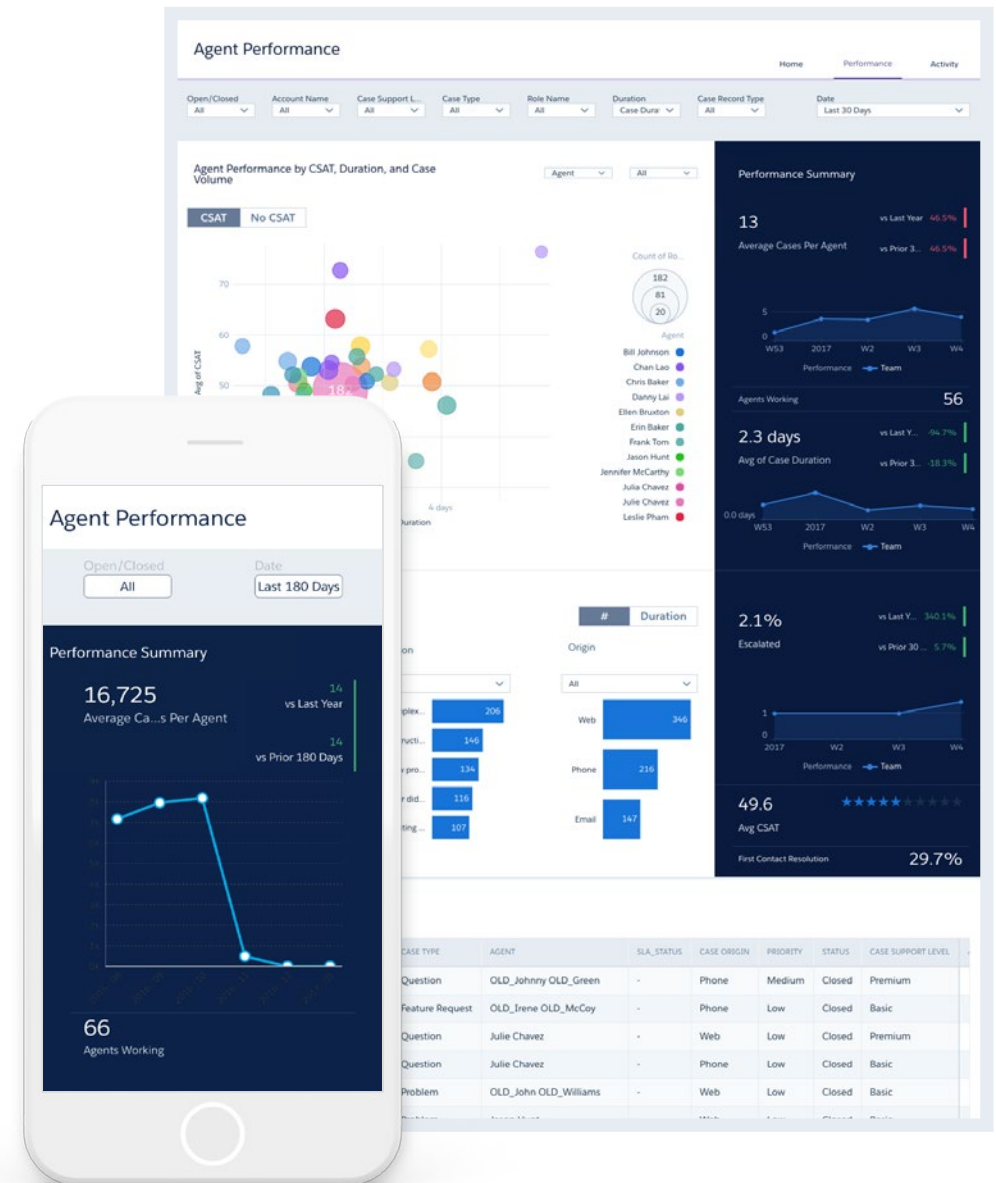
WHAT YOU'LL LEARN

How are my agents or teams performing?

Who are my top and bottom performers, and who needs coaching?

Is my agent or team improving over time or against team benchmarks?

How can we improve team performance?



CHAPTER 4

Agent Activities

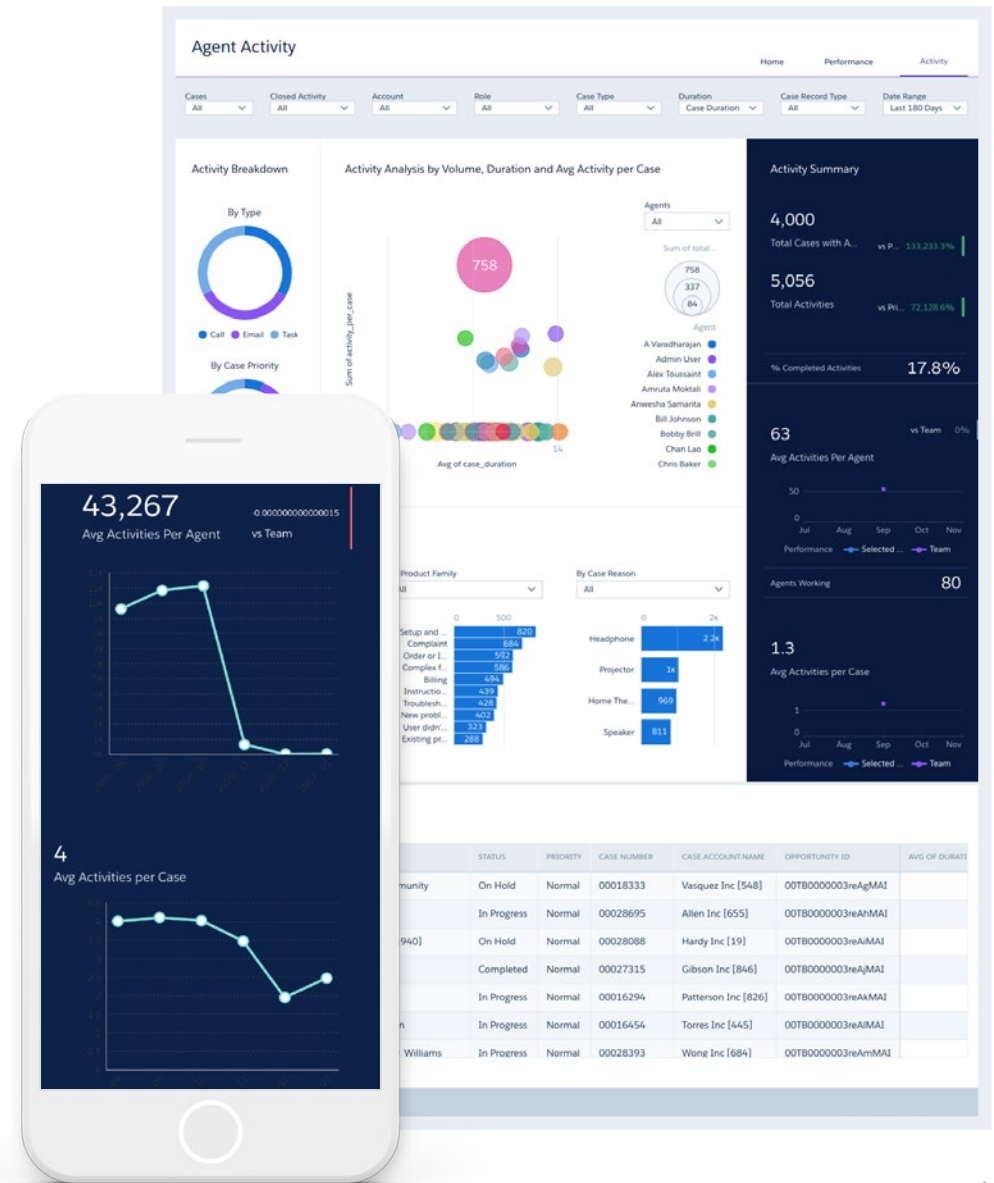
HOW EFFICIENT ARE YOUR SERVICE AGENTS? FIND OUT HERE

This is where service managers can check activities and case feeds to get a realistic indicator of how efficiently team members are working. Get insight into how much each agent is doing and how his or her work aligns with case closings, case duration, and overall CSAT.



WHAT YOU'LL LEARN

- How well is agent time being used?
- How much work is each agent doing?
- Does the amount of work align with the number of cases closed?
- How much effort does it take each agent to resolve a case?
- Who is able to resolve cases most efficiently?
- What's causing case backlogs?
- How can we improve case resolution times?



CHAPTER 5

Channel Review

IDENTIFY TOP AND BOTTOM PERFORMING CHANNELS

Instantly see how each channel is performing for customer satisfaction, as well as the volume and average duration of activities. This dashboard can help you identify underperforming channels or push certain customers into more appropriate channels.



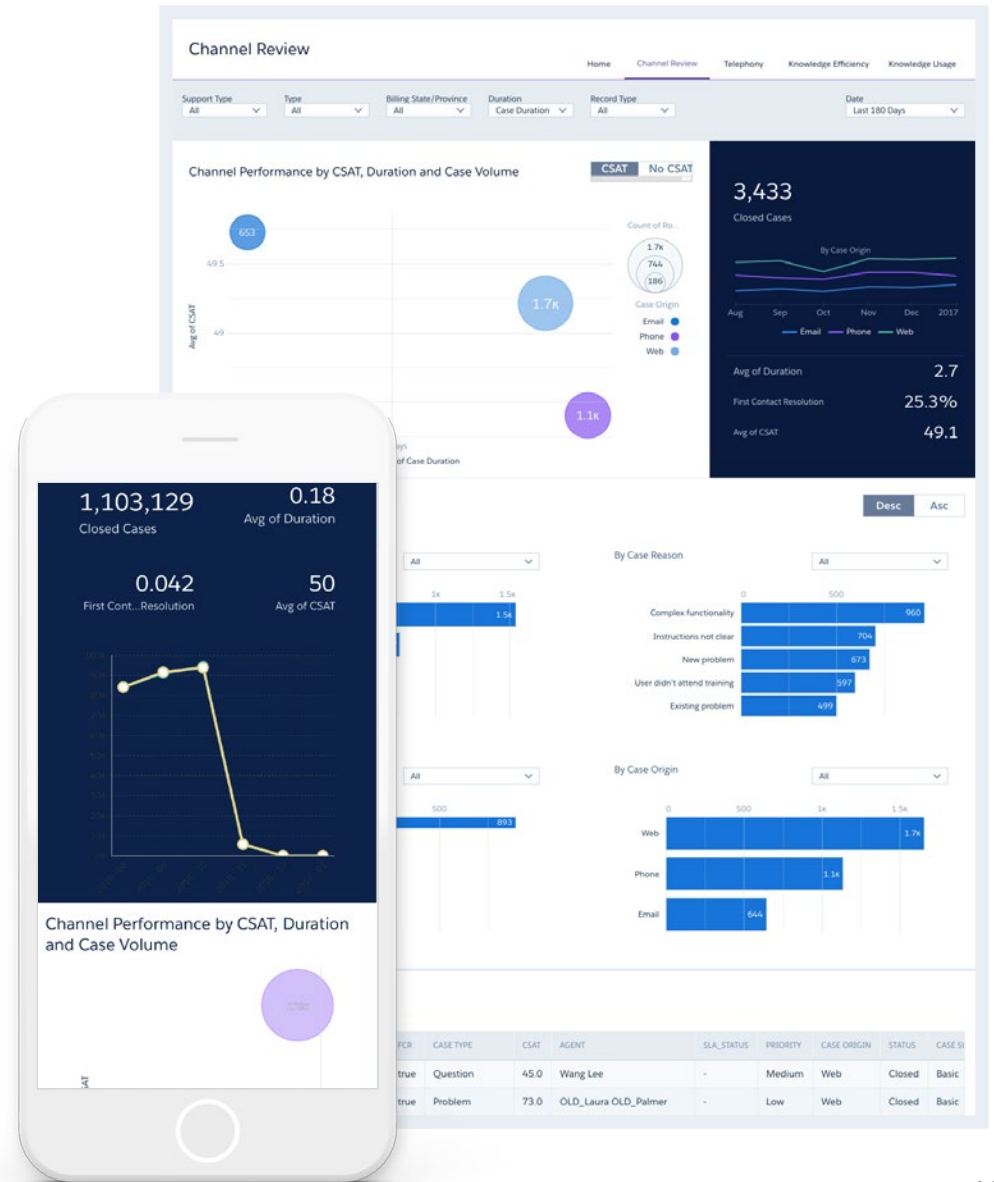
WHAT YOU'LL LEARN

How is each support channel performing in case resolution and CSAT?

Which channels are the most popular? Do certain channels attract specific types of engagement?

Why is a specific channel performing poorly?

What actions can I take to improve channel performance?



CHAPTER 6

Account Profile

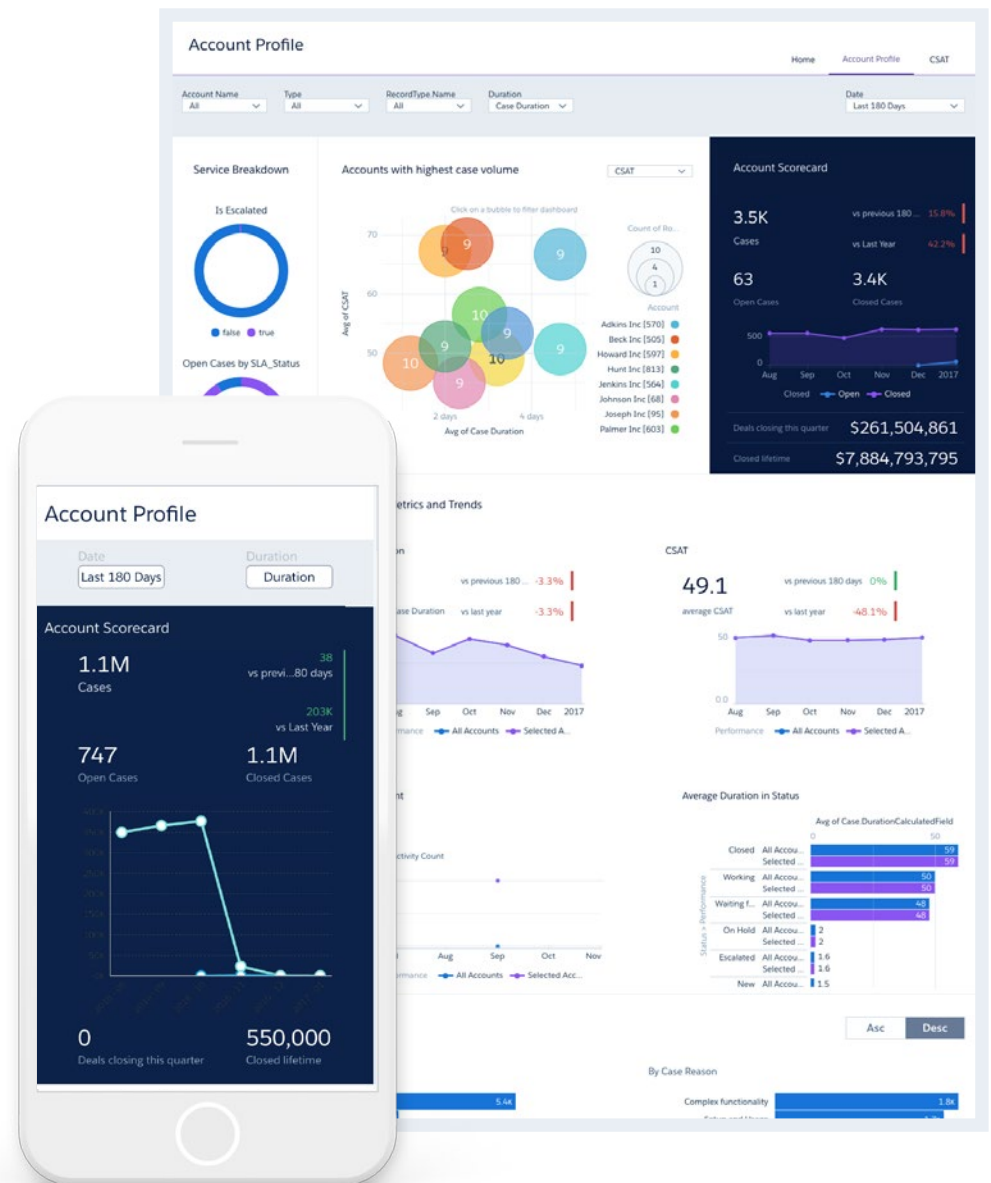
A CLEAR VIEW OF HOW YOU ARE SERVICING YOUR CUSTOMERS

See a full breakdown of a selected customer's service history and current backlog. This dashboard will keep service managers and agents informed, with key metrics and historical context that can facilitate smarter customer conversations. Pending and closed deals can also be included to provide a more complete customer view for businesses that track opportunity data.



WHAT YOU'LL LEARN

- How happy is the customer right now and over time?
- What opportunities are pending with this customer?
- What is the value of closed deals with this customer?



CHAPTER 7

Backlog

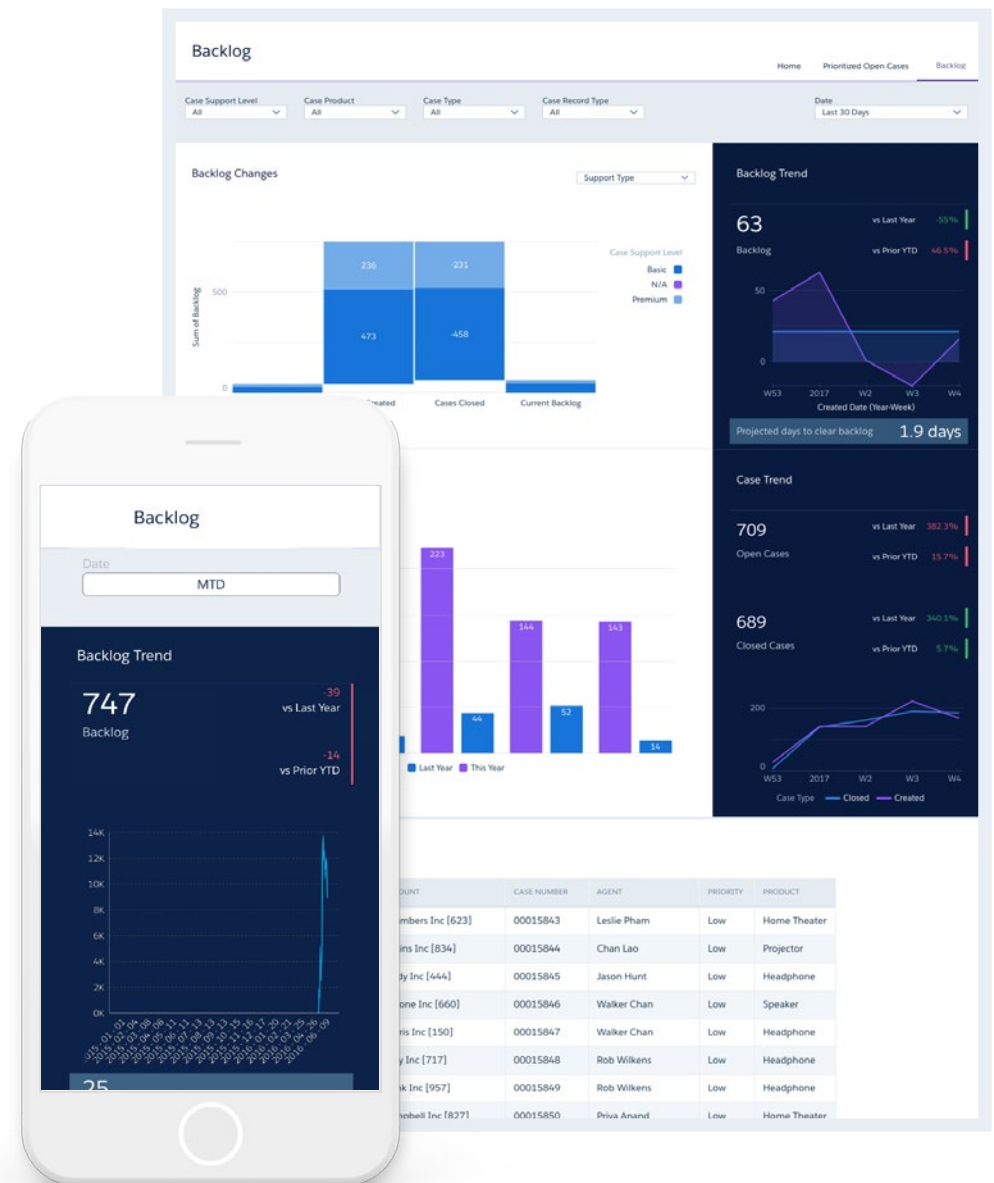
IDENTIFY BACKLOG TRENDS TO INFORM SUPPORT STRATEGY AND STAFFING NEEDS

One of the most important things service managers care about is their backlog. If more requests are coming in than are getting solved every week, a backlog is building. By answering backlog questions, managers can create a support strategy that allows them to better understand their trouble spots and staffing needs.



WHAT YOU'LL LEARN

- How well is agent time being used?
- How does volume compare to previous periods?
- Do we have more requests coming in than we are solving?
- How long it will take to clear backlog?
- What actions should we prioritize to clear backlog faster?



CHAPTER 8

CSAT

REVIEW HISTORICAL TRENDS TO BETTER UNDERSTAND CSAT DRIVERS

As a service manager, it's important to understand what impacts your CSAT score. When you can spot the top and bottom customers, agents, products, or specific reasons affecting your CSAT, you can target change. This dashboard will help you identify the products or channels being served best and worst, based on impact, volume of cases, and duration to close.

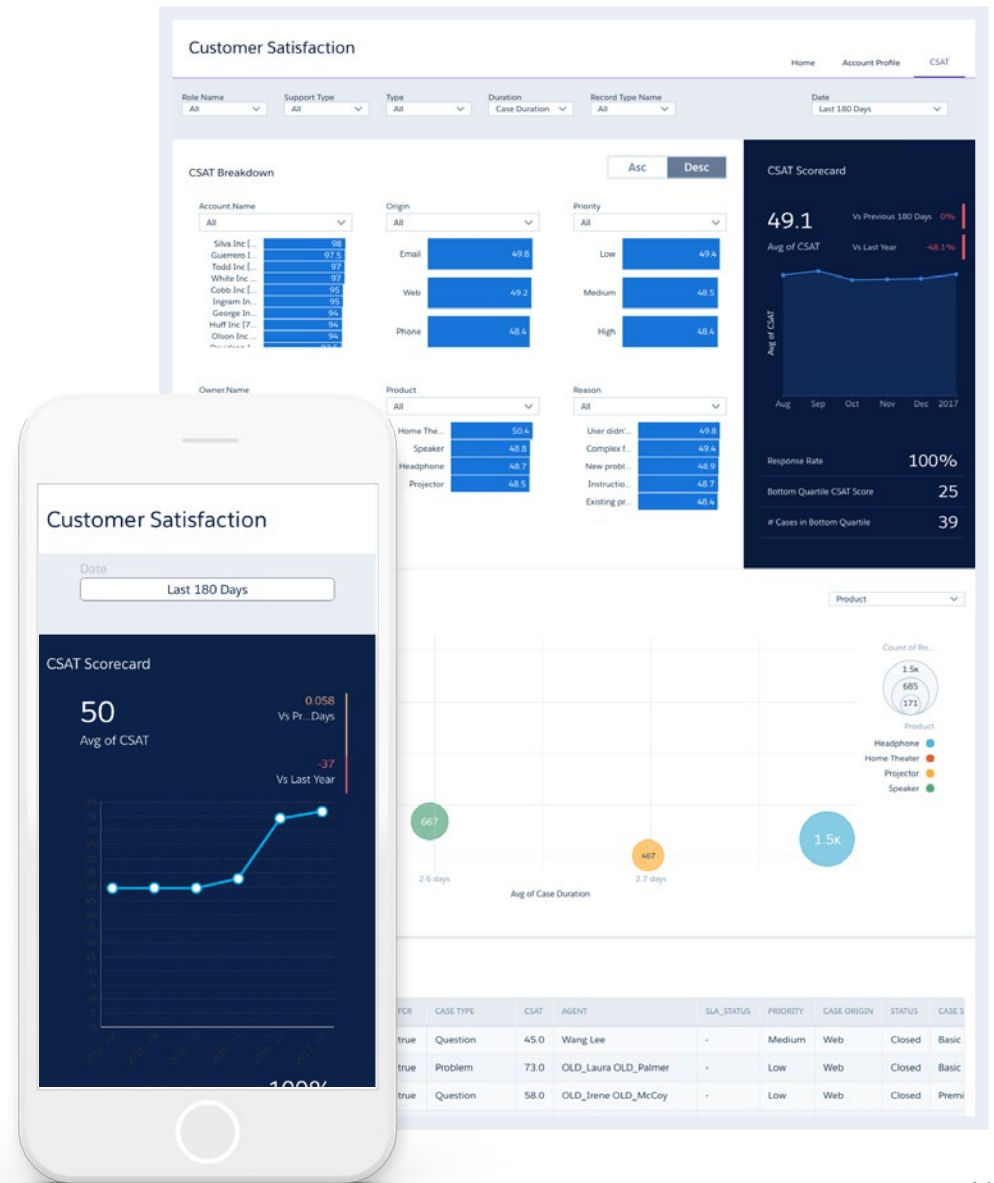


WHAT YOU'LL LEARN

What are the drivers of customer satisfaction?

Are there any outliers in terms of best or worst CSAT?

How can I improve CSAT?



CHAPTER 9

Knowledge

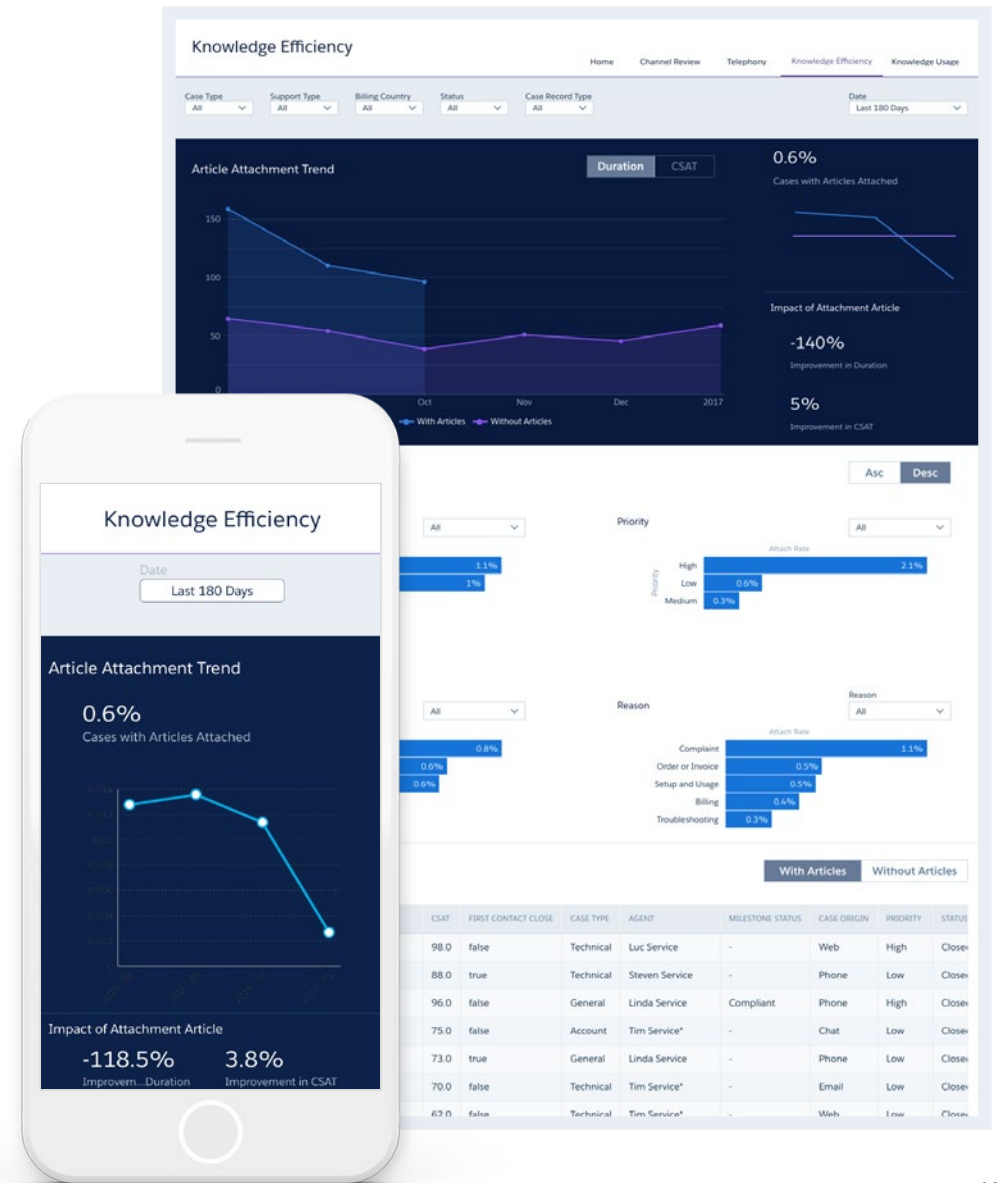
KNOW THE IMPACT OF ARTICLES ON SERVICE PERFORMANCE

As a service manager, you want to know how Knowledge articles are impacting CSAT or case duration. Understanding which articles are most popular, which agents are attaching the most/least articles, and how those articles impact CSAT can drive coaching and content strategies. Seeing which products or case reasons have the most/least article attachment rates can identify gaps. This dashboard can provide powerful justification for Knowledge in visualizing trends in duration and CSAT with or without articles attached.



WHAT YOU'LL LEARN

- How is knowledge impacting my key service metrics?
- Which agents need training with regard to knowledge?
- Are there any product or reason gaps in knowledge articles?



CHAPTER 10

Telephony

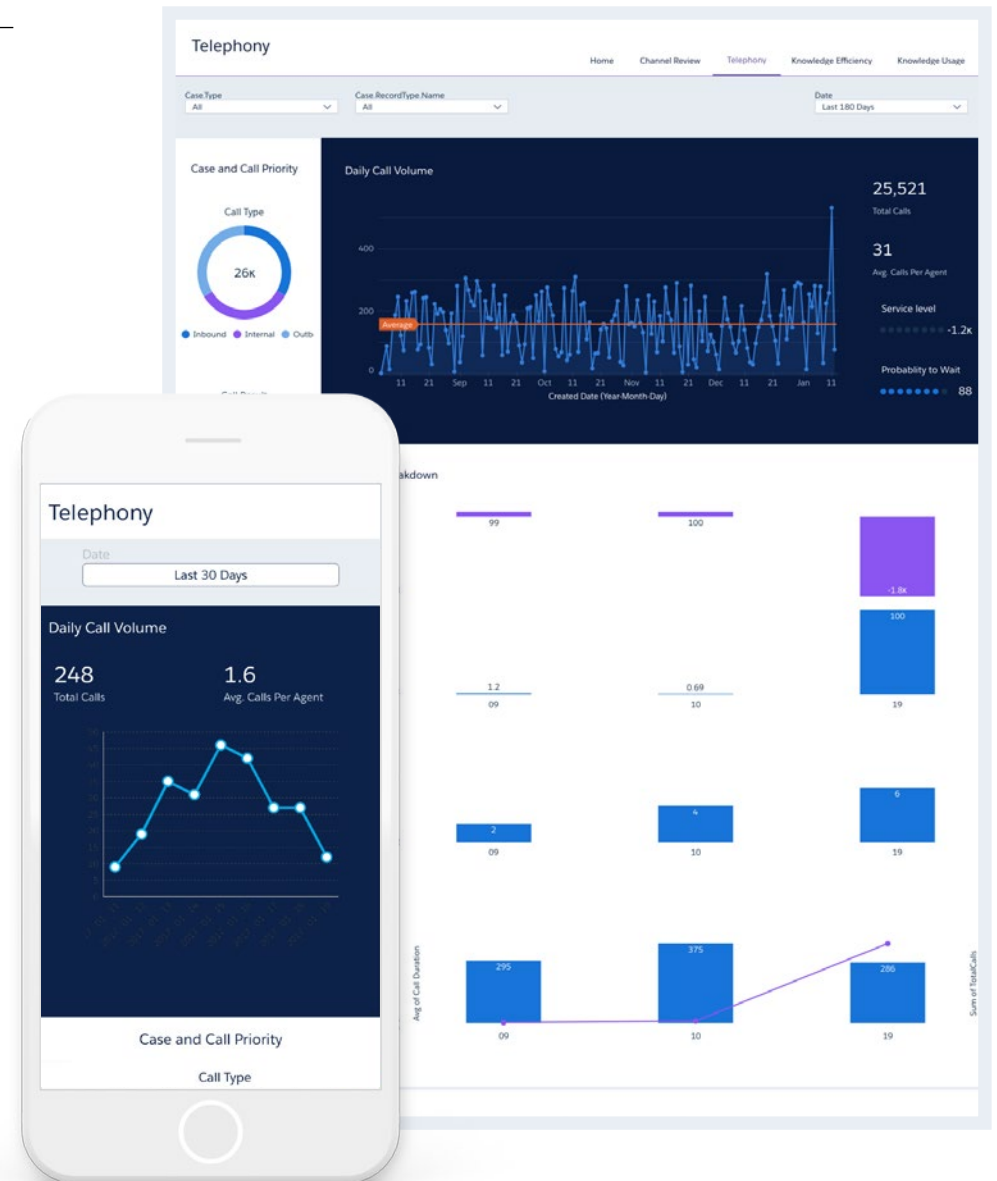
UNDERSTAND CALL CENTER TRENDS

Here's where you'll dive deep into trends in actual call volume to help determine staffing needs. You'll have a better understanding of the impact of telephone contact with customers during service case resolution. You can filter call number and duration by inbound or outbound call, the result of the call, and other factors.



WHAT YOU'LL LEARN

- When are the most calls coming in?
- Are we adequately staffed at these times?
- Which calls went wrong? How many calls were successful/not successful?
- Which agents are bottom performers from an average duration perspective?
- What percentage of the day are agents most productive?
- What issues are customers calling about most frequently?
- What actions can we take to optimize the call center and improve customer service?



CHAPTER 11

Customer Context Sidebar

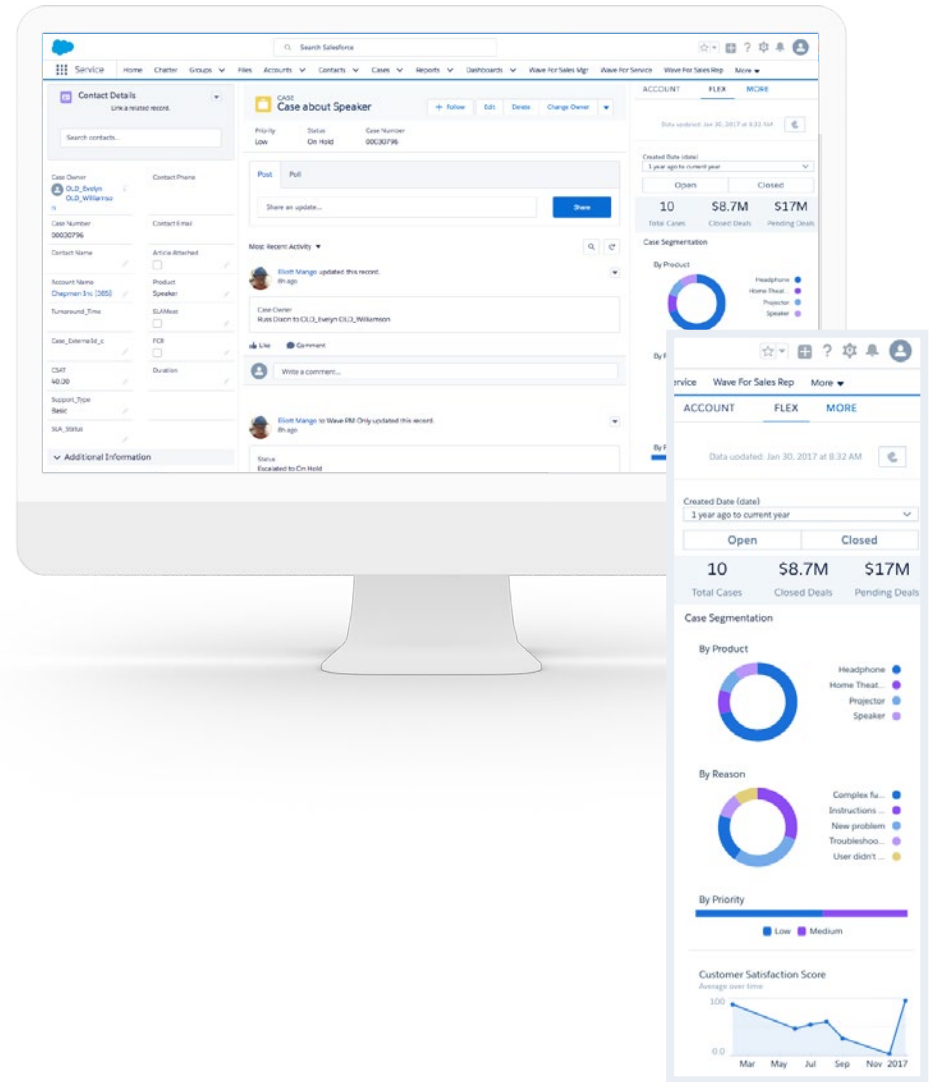
GET CUSTOMER INSIGHT AND TAKE QUICK ACTION

Service agents need a quick and easy way to access data and see historical interactions with customers. This sidebar provides insight into customer context, number of open cases, and previously encountered problems.



WHAT YOU'LL LEARN

- How are we currently servicing this customer?
- How many open cases do we have with this customer?
- What type of problems has this customer experienced?
- How happy is this customer with us?
- Has this changed over time?
- Who else has experience helping this customer?
- What opportunities are pending with this customer?
- What is the value of closed deals with this customer?



CHAPTER 12

Similar Cases Sidebar

CONSULT SIMILAR CASES TO HELP RESOLVE CURRENT CASES

Find out if there are other cases similar to the current case being worked. Anticipate or solve potential product issues and identify opportunities for new Knowledge articles.

Reach out to agents who have worked similar cases. Then set customer expectations in terms of average duration for solving similar cases.



WHAT YOU'LL LEARN

Is there a trend in this type of case?

What is the average length of time it takes to close this type of case?

Are there any similar cases that I can reference?

The screenshot displays a service agent's interface. The main window shows a case detail for 'Case about Speaker'. The sidebar on the right, titled 'SIMILAR FLEX', provides a summary of similar cases based on product and reason. It includes two line charts: 'Closed Cases' showing a trend of approximately 6,567 cases over time, and 'Average Duration' showing a trend of approximately 3.4 days. Below the charts is a table of similar cases:

#	CASE NUMBER	AGENT
1	00022141	Bill Johnson
2	00022223	Erin Baker
3	00022293	Priya Anand
4	00022295	Ellen Bruxton
5	00022352	Julie Chavez

CHAPTER 13

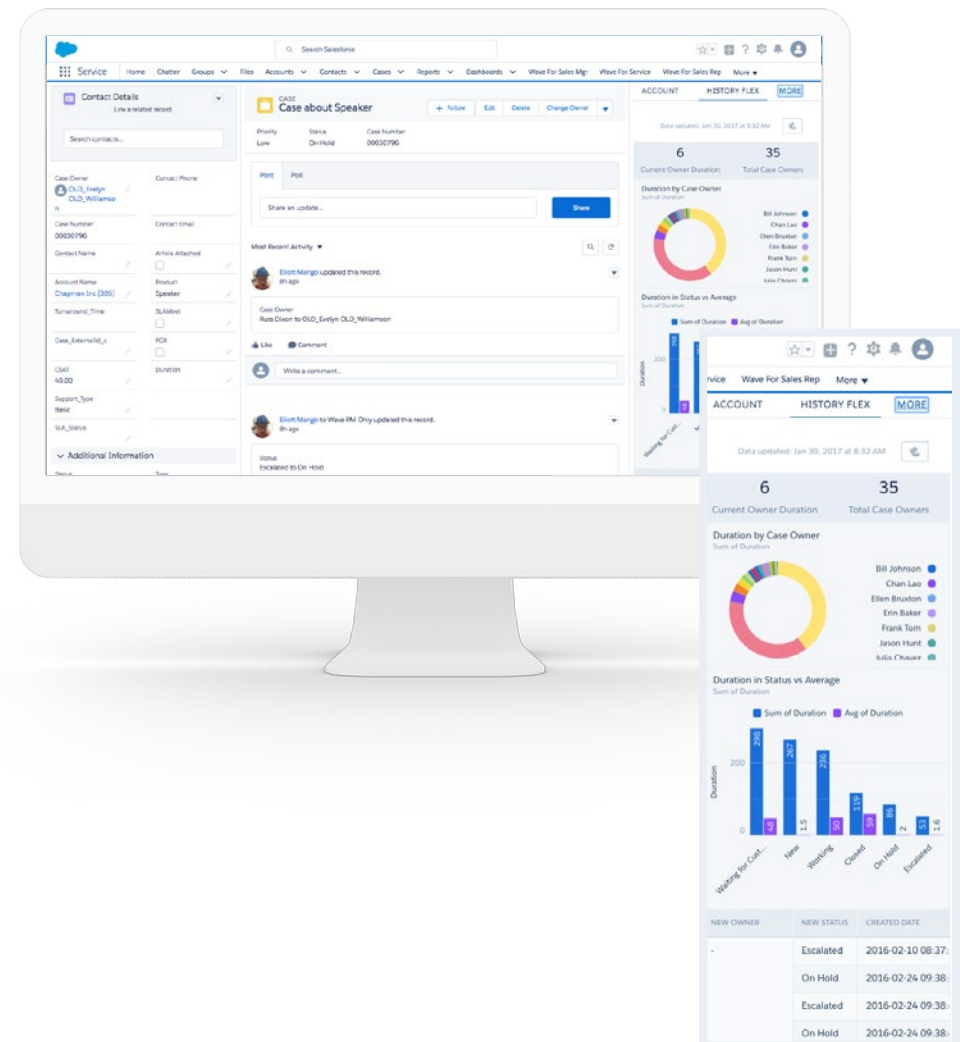
Case History Sidebar

GET COMPLETE CASE HISTORIES

See an overview of the case history or lifecycle. Get a snapshot of case interactions and benchmark against average. Case History Sidebar provides a quick way to scan the case history and be more informed during customer conversations. When viewing comparisons with the average durations, you can identify issues and bottlenecks, and understand how long it has been in the agent or customer queue.

✔ WHAT YOU'LL LEARN

- How many agents have worked this case and for how long?
- Who has had the case the longest?
- How long has the case been in each status?
- What is the health of this case?
- How does this case's duration in status compare to other similar cases?



CHAPTER 14

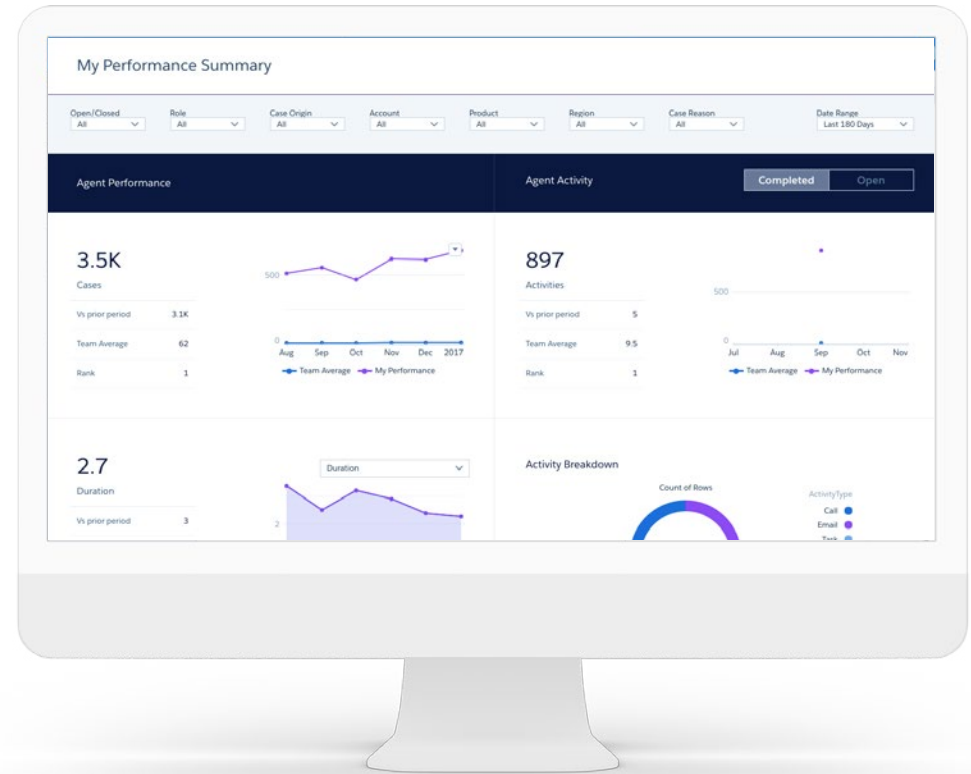
My Performance

THE SERVICE AGENT PRODUCTIVITY GAUGE

Metrics-based performance reviews, along with the merit incentives, are the keys to running an effective call center operation. Your agents can use this embedded dashboard to monitor their performance and productivity. They get continuous visibility into their performance and ranking within the call center. They'll always know exactly where they stand so when it comes to review time, there are no surprises.

✔ WHAT YOU'LL LEARN

- Where do I stand with my performance metrics?
- Is my performance improving over time?
- How do I compare to my team with regard to CSAT and activity-based metrics?
- Will I meet my bonus targets with my current performance?
- What's driving good or poor performance?
- What actions can I take to improve?



CHAPTER 15

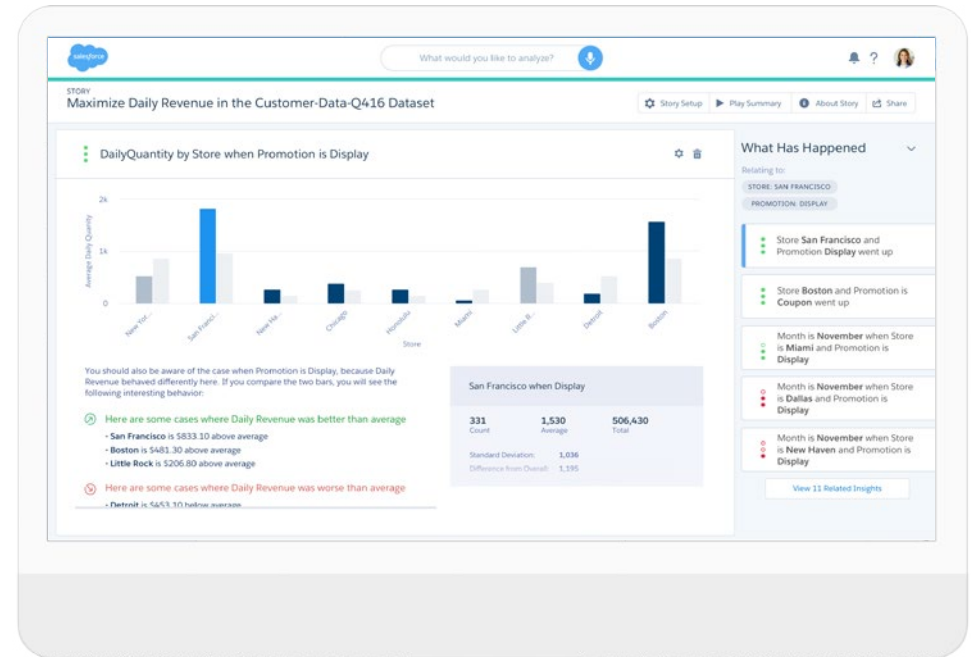
Einstein Discovery

GET THE WHOLE STORY BEHIND YOUR DATA

Your organization is sitting on massive amounts of data – but what good is it if you can't analyze and learn from it? Most complex service issues have causes that weave through layers of interrelated variables, so just scratching the surface isn't enough. You need to drill down. Service Analytics with Einstein Discovery does the heavy lifting for you – helping you find the right insights in your data and presenting them to you in simple, narrated stories. By uncovering key relationships and trends, you'll be able to act on your data – right from where you work – to optimize each customer's service experience.

✓ WHAT YOU'LL LEARN

- What's the correlation between customer satisfaction and retention?
- What opportunities can you capitalize on to improve support operations?
- What will case volume look like next quarter?
- How can you coordinate with marketing and sales to boost CSATs?



CHAPTER 15

Conclusion

WHERE DO YOU GO FROM HERE?

Service Analytics delivers ready-to-go insights that make it easier for your entire service team to get smarter about your customers and provide world-class customer service from anywhere.

A logical addition to your Service Cloud investment, Service Analytics can help your CSAT scores and turn an average service department into a competitive differentiator. Now, every service manager can get instant updates on net promoter scores, service level agreements, case volume, and trends across all channels, and every service agent can deliver more personalized customer service.

Think Service Analytics is right for your service department?

Contact your account executive today and learn how you can get up and running in minutes with the best Service Analytics for Salesforce customers.

For more information on Service Analytics,
please visit salesforce.com/analytics or call 800-NO-SOFTWARE.





CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY