

# How Salesforce Delivers Exceptional Service Using Service Cloud

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# Introduction

Since its founding in 1999 by Marc Benioff and Parker Harris, Salesforce has grown into the largest provider of CRM software in the world.

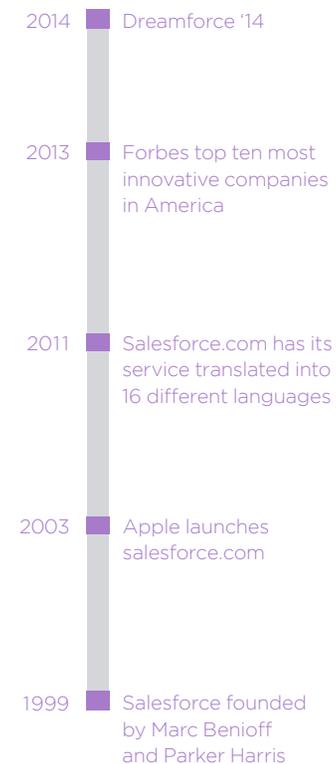
While hyper growth is the dream of every startup, it brings its own challenges, not the least of which is providing a best-in-class customer service experience to a rapidly growing customer base. In this e-book we will take a look at how Salesforce uses Service Cloud to deliver customer support. We will take a look at the challenges faced by Salesforce and how the customer service organization used Service Cloud and the Salesforce Platform to provide all customers, from the most technophobe business user to a power developer, with a best-in-class service experience.

## Differentiating on Service

When Salesforce was founded in 1999, Oracle and SAP dominated the enterprise software market. So how does David compete with Goliath? While a superior value proposition with the cloud was the first and foremost competitive differentiator, delivering a better service experience was also critical. In a subscription-based business, delivering exceptional customer service is key to retaining customers who are not constrained by the large up-front cost lock-in that comes with purchasing bulky on-premises software. Salesforce established a policy to let any end user open a case, not just the department administrator. That meant cases of every variety came to support, ranging from a business user who needed

basic help navigating the menus to a technical user engaged in technical configuration. The service department was tasked with delivering not just great service but service to a broad and diverse group of users.

## Salesforce Milestones





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# The Challenges of Growth

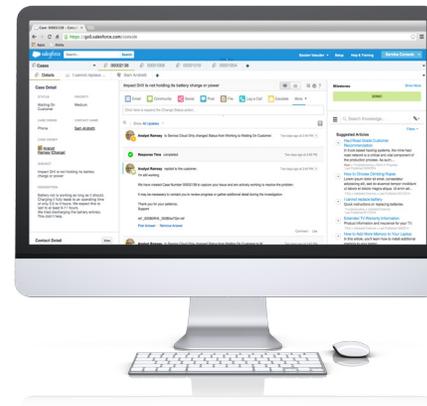
From its humble beginnings as a disruptive startup 15 years ago, Salesforce has grown into the largest provider of CRM software in the world with more than a 100,000 customers.

During this time, Salesforce has also significantly grown its product offering. Salesforce started with a single product: a cloud-based sales force automation solution. Today, Salesforce delivers an integrated platform across sales, service, marketing, and communities with deep investments in analytics and mobile computing to help today's customers run their business from their phone.

In the past, Salesforce grew its service department at the same rate it grew revenues. With the workload increasing 30% year over year, this resulted in a 30% growth in service costs and associated headcount. However, if an organization is to protect its bottom line and invest aggressively in Research and Development, it has to be able to control operating costs and find economies of scale. Several years ago, support executives at Salesforce were tasked with finding those efficiencies and cutting the rate at which service costs were growing to a rate significantly less than that of the corporate growth rate without sacrificing customer satisfaction (CSAT) scores.

## Optimizing Agent Productivity

Over a period of time, even the simplest solution can become complicated. Each new business challenge requires new functionality, which gets added to the original deployment until the solution starts to resemble an octopus more than a torpedo. As the company grew to add new product lines, take on new acquisitions, and enter new markets, it was time for what had started as a streamlined agent desktop to get a much-needed makeover.



The Service Cloud Console - A redesigned, optimized user experience that brings together all the channels, tools, and information agents need to quickly and efficiently resolve cases.

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# A World-Class Service Solution

Today, Salesforce delivers a world-class service experience to companies of all sizes, across different industries, around the globe.

Salesforce's team of 850 agents provides 24/7 follow-the-sun support from 15 locations and in 11 languages with a combination of both in-house and outsourced agents. Customers can choose from four tiers of support: Standard, Premier, Premier+, and Mission Critical Success. The support organization gives customers a range of options for service by supporting a broad channel mix, including phone, email, self-service, communities, live chat, and social media.

## Responding to Growth

When it became clear to support executives that they could not increase their budget and headcount indefinitely at the same rate as the corporate growth rate, they turned to innovation, automation, and enabling the Salesforce 1 Platform to find operational efficiencies. The foundation of the new solution was the Salesforce Cloud Console, which powered the unified agent desktop within Service Cloud. With the Salesforce Cloud Console, agents have a rich 360-degree view of the customer at their fingertips. Combined with Salesforce's integrated knowledge offering that instantly served up relevant information, agents are able to respond quickly across



any channel, for issues about any Salesforce product, and on any device. Entitlements, milestones, and service-level agreements (SLAs) ensure that every customer is getting the appropriate level of service in a timely manner.

By leveraging Service Cloud and the Salesforce 1 Platform, the support organization was able to not only meet the challenges given to them by the executive team, but was able to exceed expectations. They also reduced case volume by 30% by shifting cases to self-service and other lower cost channels, while freeing agents for higher severity issues. With the new Console, agent productivity rose by 14% (Figure A), all while maintaining previous high levels of CSAT.

## A New Self-Service Portal

A new self-service portal solution was deployed using the latest technologies, including Salesforce Communities. With integrated knowledge, customers were able to ask questions and quickly find answers from the knowledge base, peers, or experts in the community. Salesforce was able to greatly increase adoption of the portal and the community with 50% growth in visitors year over year, which drove an increase in successful self-service resolutions. This was critical to reducing case volume by 30%, which consequently reduced operating costs. Thousands of customer inquiries that would have become cases were handled online through Web self-service. Customer communities allow customers to answer each other's questions, share best practices,

(Figure A)



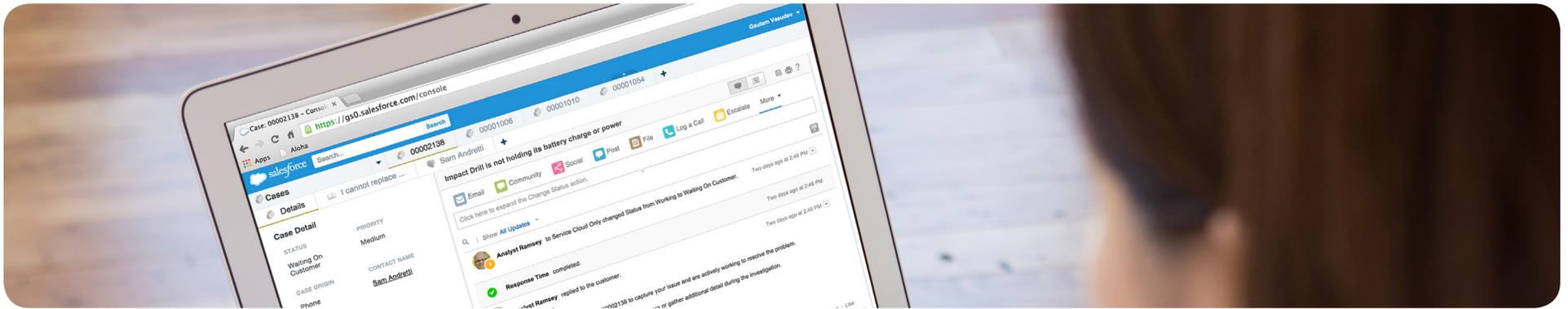
and access useful tribal knowledge. A partner portal and community allows partners to create cases on behalf of their customers and then track those cases from inception to successful resolution.

## Knowledge-Powered Support

Knowledge was a crucial piece of the puzzle for Salesforce. The Salesforce Knowledge offering is Knowledge-Centered Support (KCS) verified, which translates into higher agent productivity and improved customer satisfaction. The Salesforce internal knowledge base has about 10,000 articles to support the entire platform with about 10% of those articles receiving revisions and updates on a quarterly basis. Knowledge champions both within the service organization and across the product groups ensure that the knowledge base stays up to date. Agents are trained that if an article doesn't exist for a given question, they should author one and attach it to a case. Salesforce boasts more than 90% attach rate of articles to cases. Cases with articles attached to them typically result in an 18% increase in CSAT and a 14% increase in agent productivity (Figure B). Executives monitor detailed knowledge metrics such as popular articles, article ratings and effectiveness, and author productivity. A full-time knowledge librarian orchestrates cross-department resources. The power and ease of use of Salesforce Knowledge has given the company the confidence to use outsourced agents for certain types of cases as well as the ability to ramp up new agents in an efficient manner.

(Figure B)





## Harnessing the Power of Collaboration

When the company introduced Chatter, Salesforce's integrated collaboration platform, the service department was one of the first to adopt it. Collaboration within the service department has taken many forms. First and foremost, agents are able to collaborate with each other and with experts to resolve issues. A tough service issue that might have required escalation or days of research now can be resolved with a single Chatter post, allowing individuals across the organization to provide input. Using Chatter, agents with technical skills, language abilities, and location relevant to the issue can be automatically subscribed to the case and can jump in with suggestions, especially if they've seen a similar problem before. Chatter is also used to provide complete transparency to managers and executives. Managers can follow important cases and stay up to date on of progress even from their mobile phone. The bulk of executive communication is now done via Chatter. Chatter is also used to provide recognition to agents upon successful resolutions of

a case. Finally, with Chatter, Salesforce is able to break down departmental silos and have agents work alongside engineers and product managers, ensuring that the focus stays on the customer.

## Servicing Customers over Social Media

Using Salesforce's own fully integrated social suite of applications, the support organization monitors customers' social activities over a host of social channels such as Twitter, Facebook, LinkedIn, and even blogs. Automated filtering based on keywords and other rules alert agents to which posts need responding. Agents are able to respond within the channel the issue was raised in and escalate the ones that need to become cases.

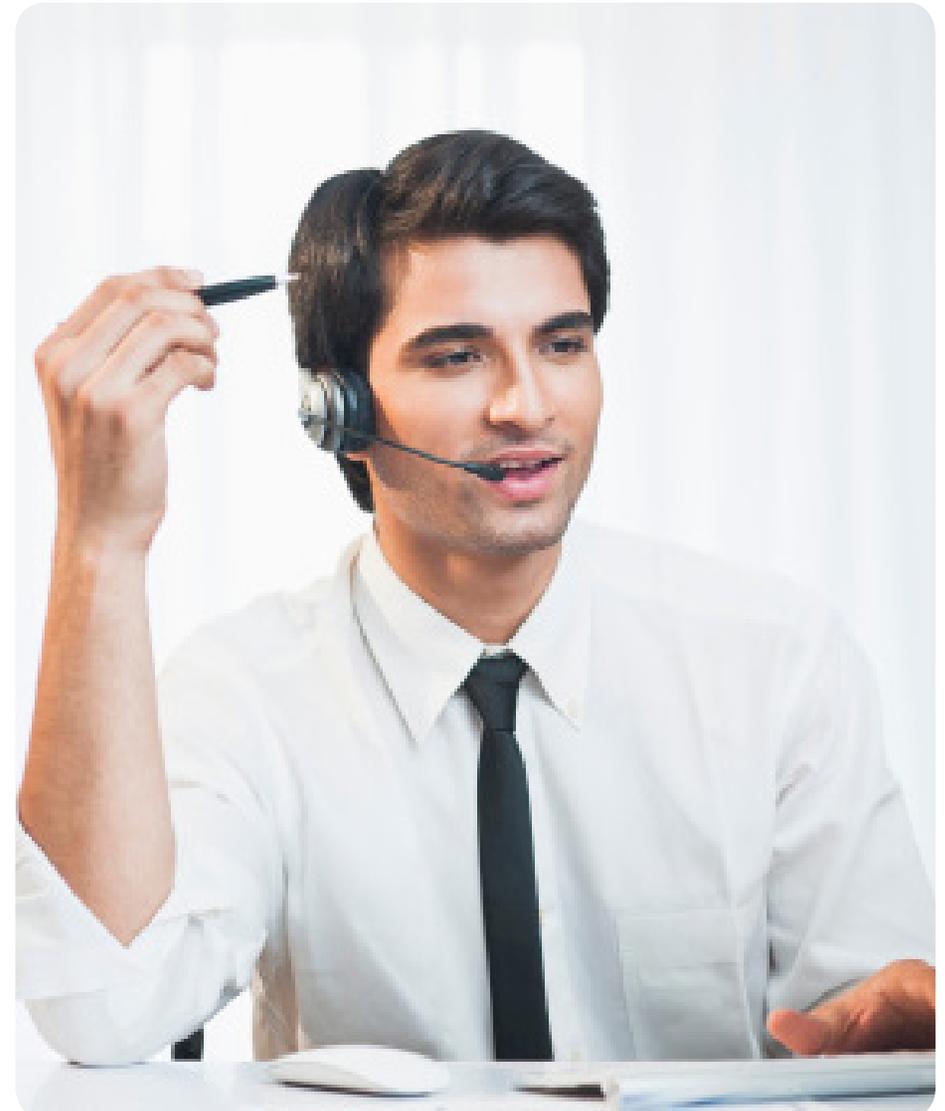
## Thriving under Diversity

As the company has grown to offer a broad enterprise platform for the front office, the support department that used to service one product

must service products that span sales, service, marketing, analytics, and communities. Over the years, Salesforce has moved into new markets, been tasked with supporting new languages, acquired companies, and become the world's largest enterprise cloud computing company. In order to maintain a high level of service in a cost-effective manner, the support team has divided itself into 10 high-level skills groups such as Mobile, Developer, Performance, and Security, each with further subdivisions as necessary. The platform's powerful business rules and workflow capabilities ensure that cases, regardless of the channel in which they originate, are routed to the right agent with the right skills for the job. Each skill group has a manager who serves as a liaison with internal experts and helps agents stay certified on their skills despite rapid innovation to the platform in the form of three releases a year.

## Providing Full Transparency

Having built a company on providing exceptional customer experiences, Salesforce executives are regular consumers of service metrics. Underperforming CSAT scores are analyzed with root cause analysis to determine what went wrong. Executives have 24/7 access to CSAT and other service metrics from their phones and tablets and can seamlessly share and collaborate on dashboards. Twice a week in-person meetings are used to answer questions rather than present numbers. Executives can drill into dashboards and even modify reports without having to involve the support staff or IT.



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# Innovation in Support

With three seamless upgrades a year to the Salesforce 1 Platform, the support organization is able to continuously innovate to better service customers.

In today's hyperconnected world, customers expect fast, personalized service on the channel of their choice. Using Salesforce Chatter, support agents, managers, and executives stay connected with the product teams and have full visibility into upcoming capabilities.

## Predictive Analytics

Providing proactive service rather than waiting for a customer to log a case is a key area of focus for the future. The click patterns of a customer within their own Salesforce deployment or on the self-service portal could alert an agent that a customer is struggling with a problem and automatically create a case. When a customer's Salesforce deployment is reaching technical limits that might affect performance, rather than relying on administrators or a managed services team to take measures, alerts as well as automated actions based on business rules could kick in, such as provisioning additional resources. Bots could analyze code, such as how a report is written, or how a configuration is accomplished, to ensure that best practices are followed, and consequently alert developers to a problem before a business user is impacted.





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# Conclusion

The Salesforce support organization accepted a herculean task to deliver a consistently high CSAT score with only a nominal budget increase in an environment of hyper growth. They were able to successfully deliver on this challenge by leveraging the power of Service Cloud. Agents are able to use the optimized Salesforce Cloud Console to efficiently service customers across all products and all channels. From the phone to live chat to social media, customers can ask questions from any device. Integrated Knowledge puts answers at agents' fingertips. Collaboration helps improve productivity and provides complete transparency to agents. With social support, agents and managers can harness the voice of the customer as well as respond to customers on the channel of their choice. Automation, such as skills-based routing, ensures rapid response, high agent productivity, and high customer satisfaction. Finally, analytics allows managers and executives to stay on top of service metrics, anytime, anywhere, and from their smart phone or tablet. Using Service Cloud, the Salesforce support organization was able to reduce case volume by 30% and increase agent productivity by 14%, all while maintaining a high level of CSAT. By providing world-class service to customers across every interaction, Salesforce has been able to grow over the last 15 years into the world's largest enterprise cloud computing company.



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