Wave App for Service Guide

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

salesforce wave analytics

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

Built on the Wave platform, Wave for Service is a ready-to-go analytics app for Service Cloud customers. With pre-packaged dashboards easily populated with your Service Cloud data, this app delivers a complete view of critical KPIs for service managers and agents directly to any device. Service leaders get instant insight into net promoter scores, case volume, team performance and trends across all channels. Every service agent gets a 360-degree customer view 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, agents get insights and can take action in Service Cloud right from where they work.

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

Wave for Service Dashboards

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 back into Service Cloud
- How to create, edit, and close cases from the point of insight, edit any Salesforce record or object, and share insights with your team

WHO THIS GUIDE IS FOR

Service managers get visibility into team performance, call centre efficiency, channel optimisation, 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 personalised 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

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 SIDEBAR 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**

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 organisation and clearly communicate issues that require further investigation. It also provides navigation to all other dashboards in the app.

WHAT YOU'LL LEARN

Is there anything I should be concerned about?

How are we tracking against average or targets?
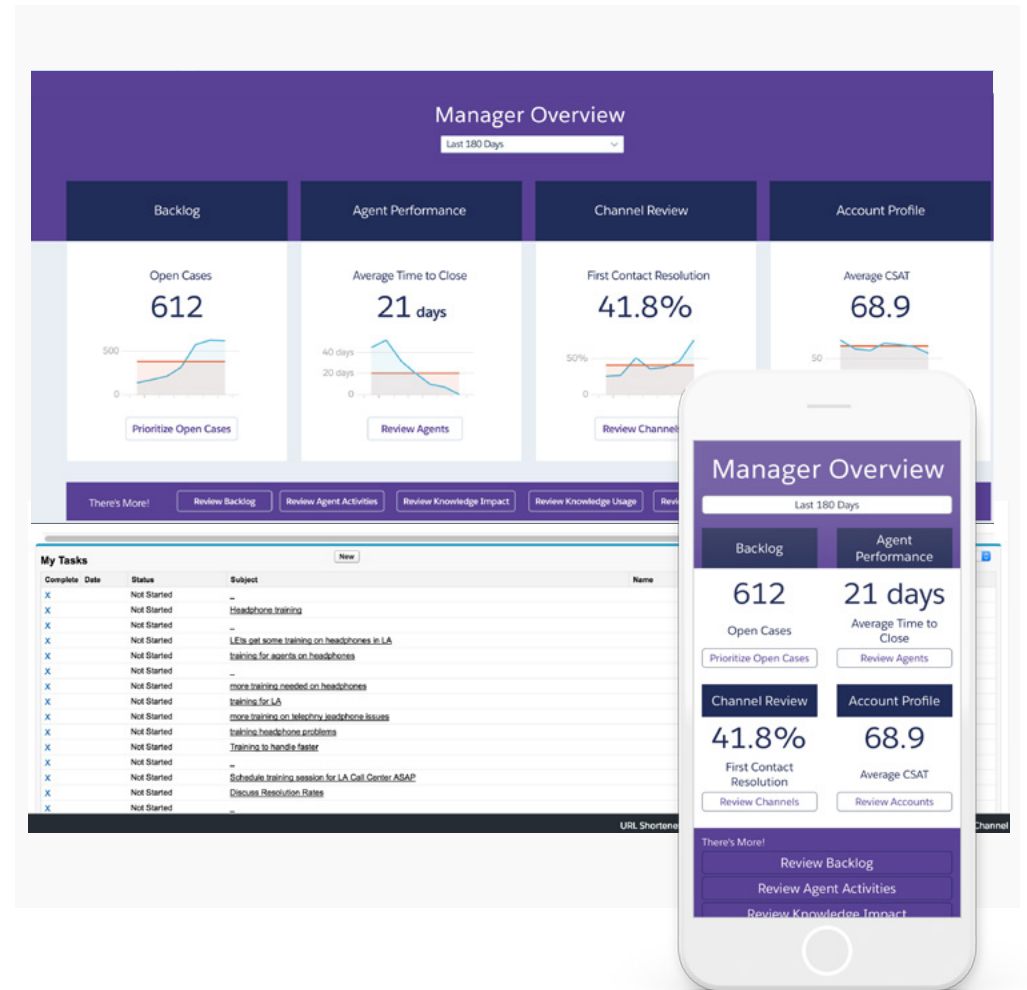
Open Cases

PRIORITISE CASES AND TAKE ACTION

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

What are the details of the actual cases?

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 can provide context and drive coaching discussions.

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?
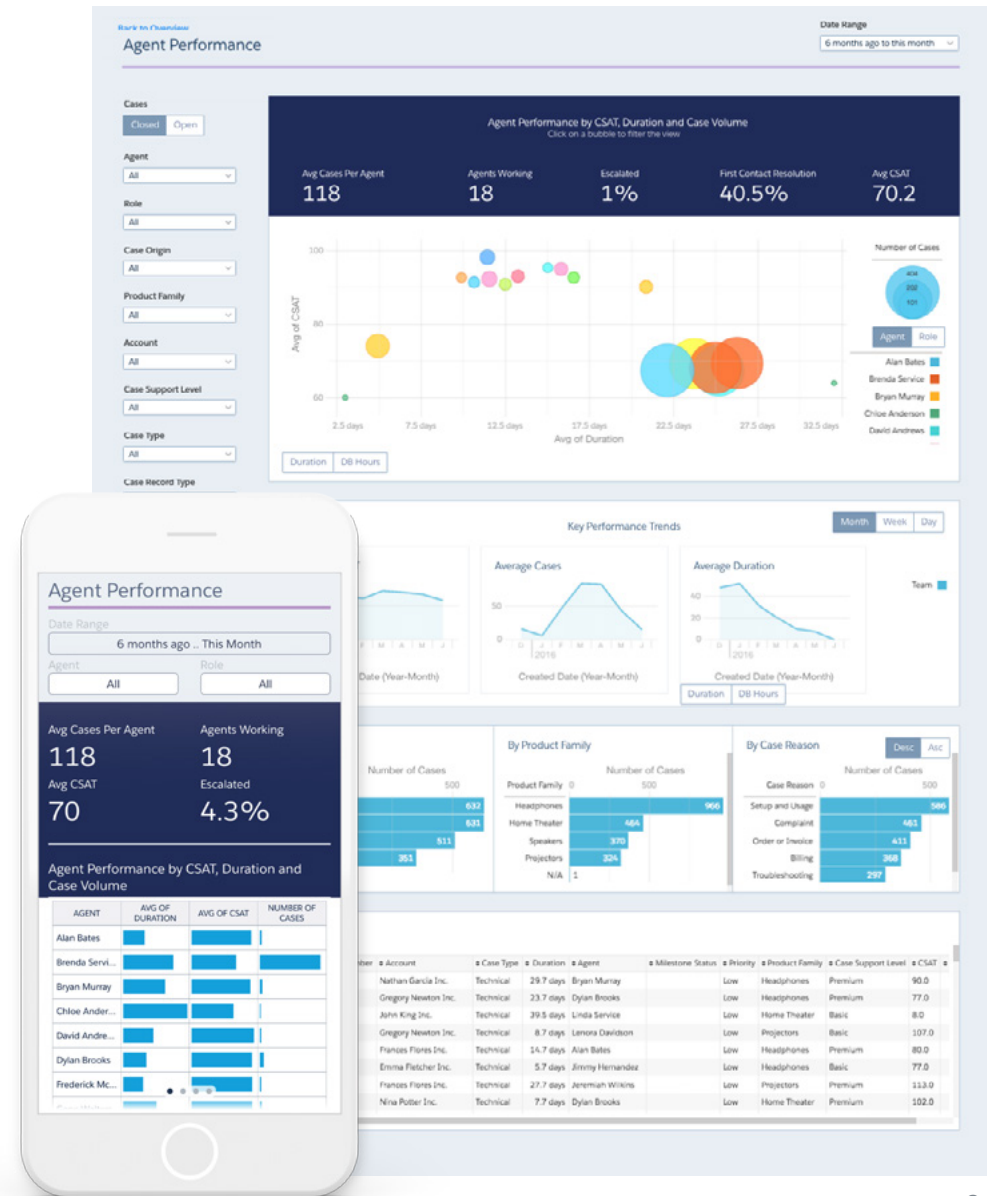
Agent Activities

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 utilised?

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?

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?

How do I optimise each channel?

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?
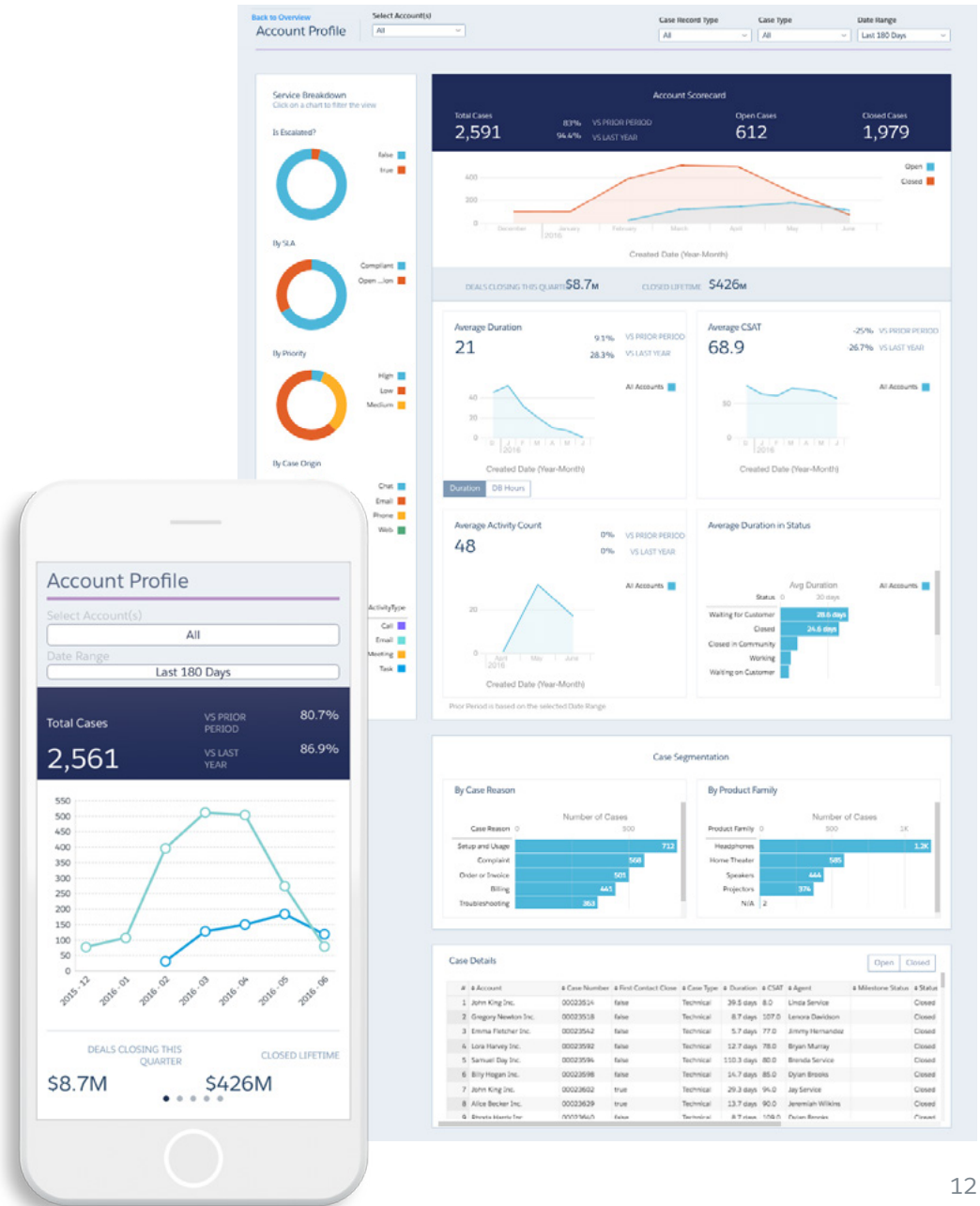
Backlog

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.
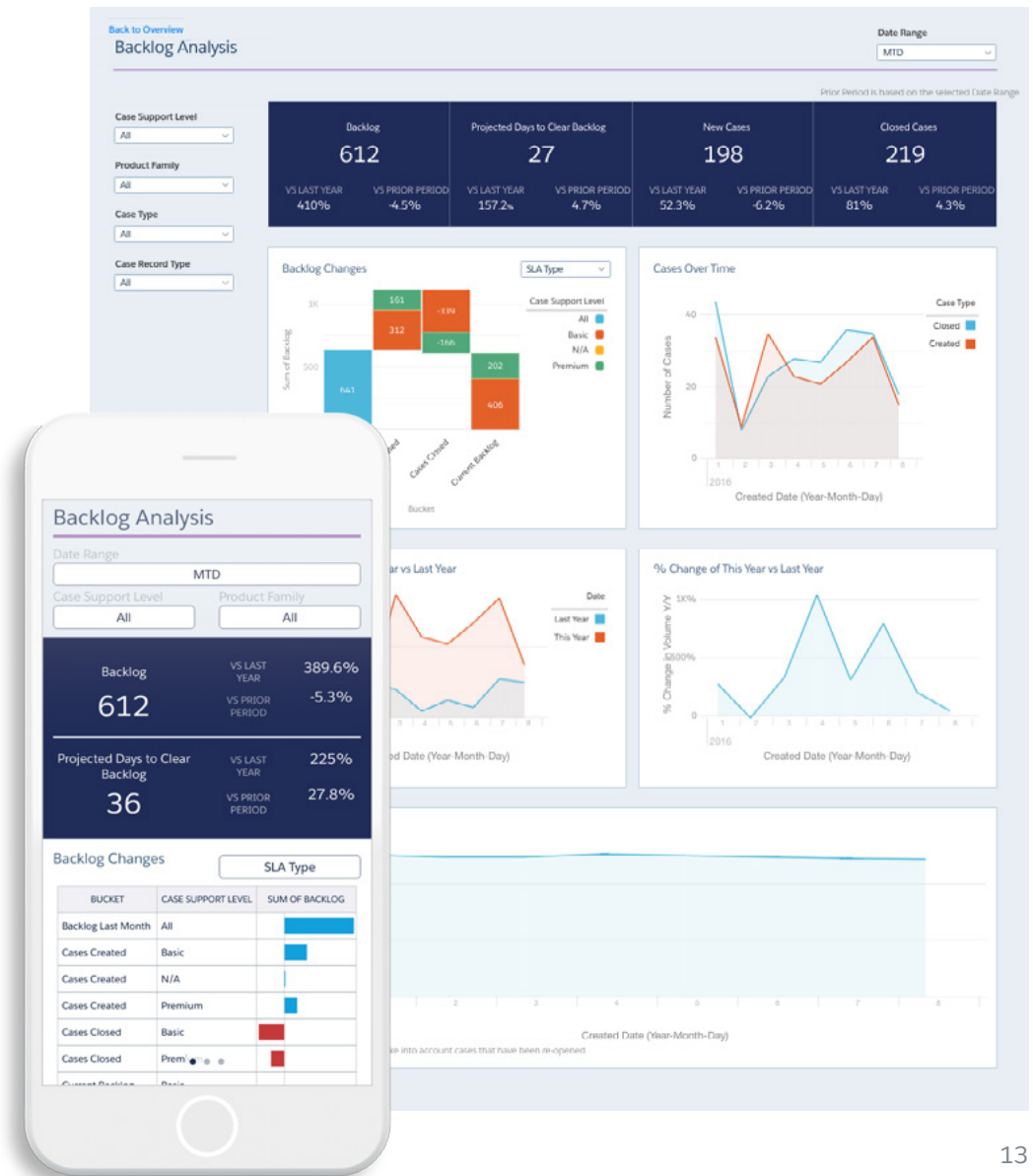
WHAT YOU'LL LEARN

How well is agent time being utilised?

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?

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?

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 visualising 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 regards to knowledge?

Are there any product or reason gaps in knowledge articles?
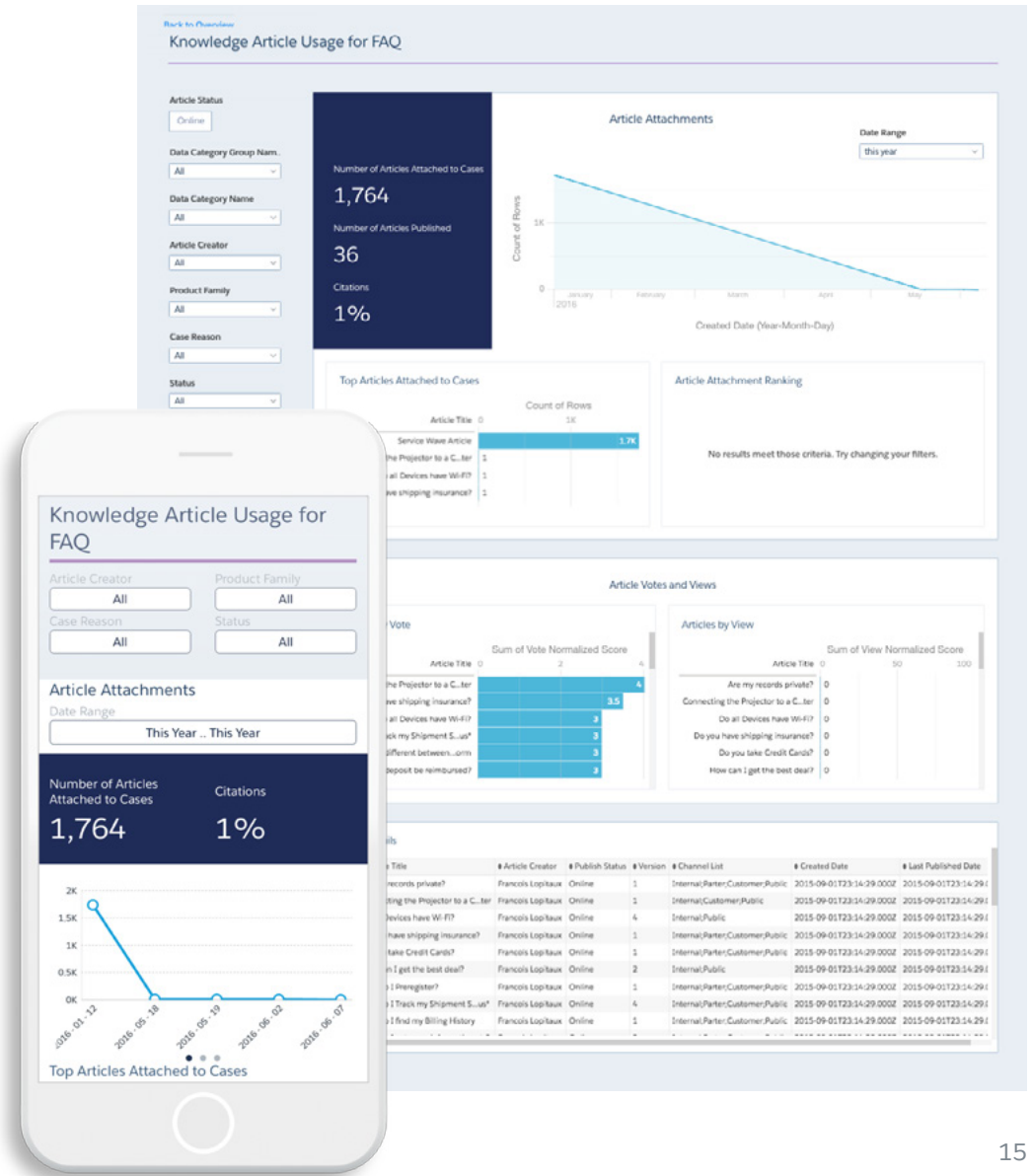
Telephony

UNDERSTAND CALL CENTRE 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 average duration perspective?

**What percentage of the day are agents most productive?**

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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 have they 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?
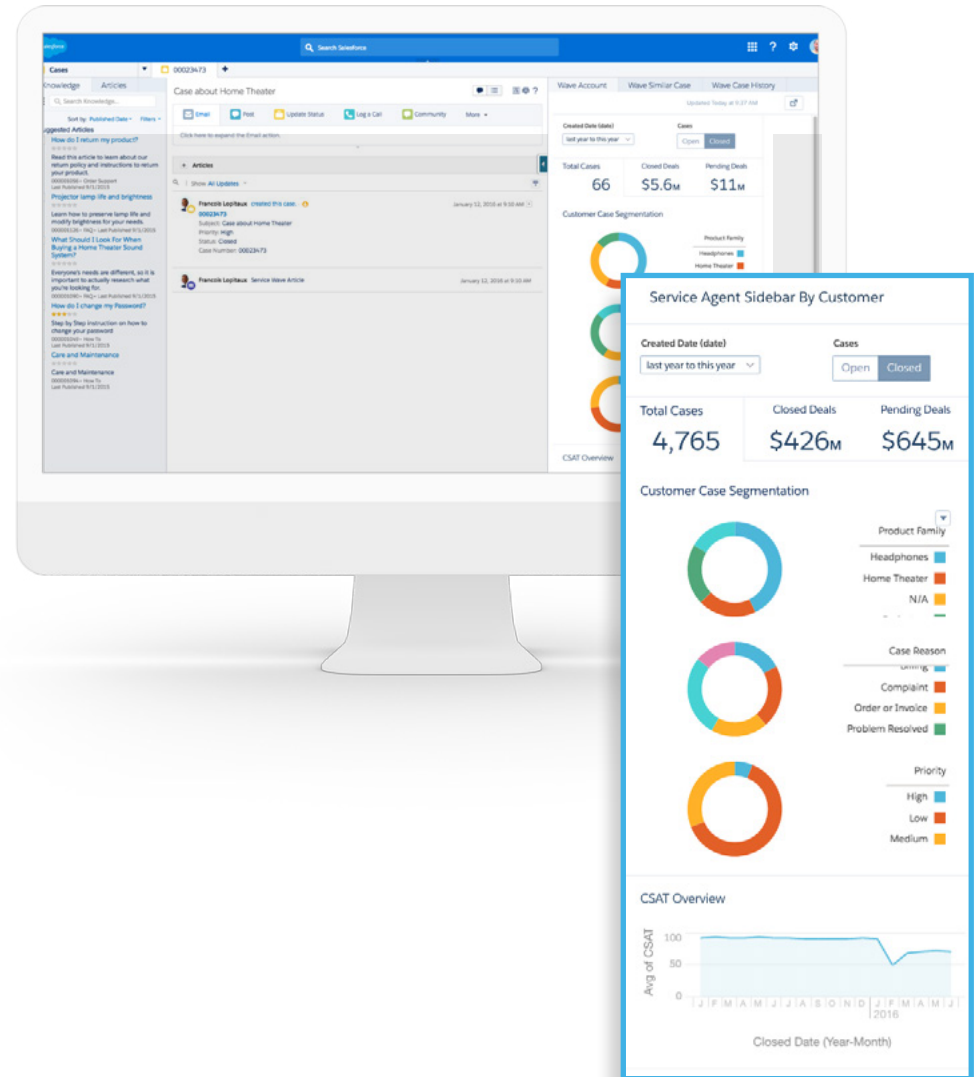
Similar Cases Sidebar

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 identif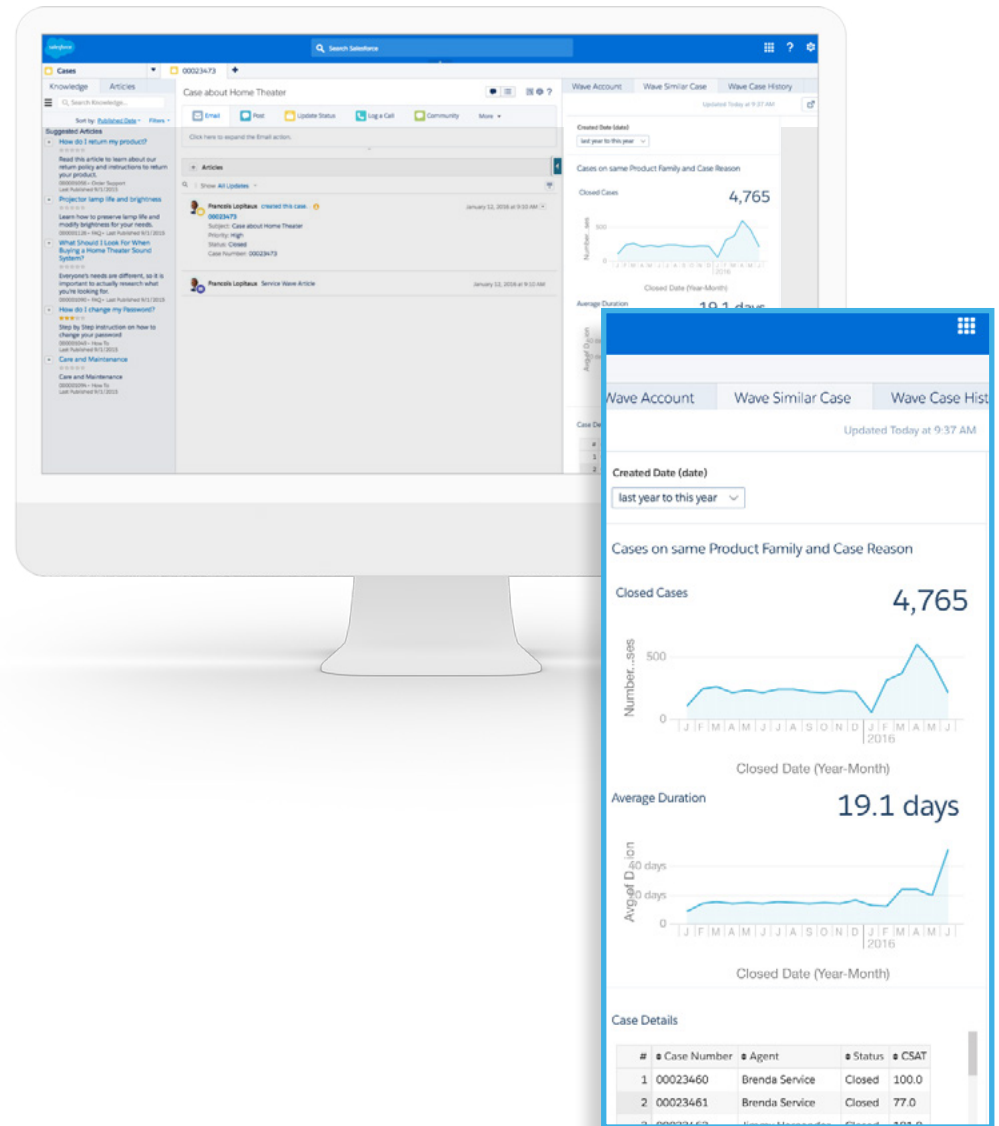y opportunities for new Knowledge articles. Reach out to agents who have worked similar cases. Then set customer expectations in terms of average duration for solving similar cases.

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?**

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?
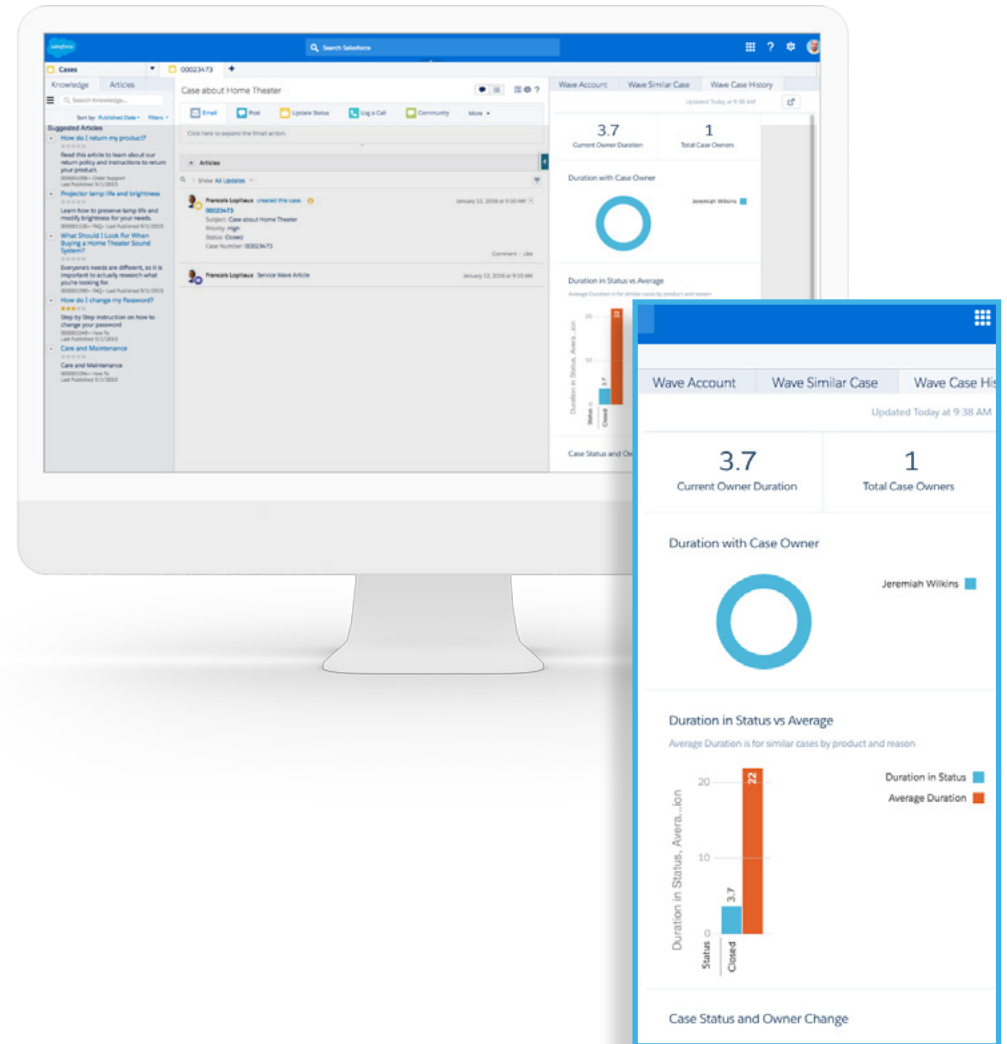
My Performance

THE SERVICE AGENT PRODUCTIVITY GAUGE

Metrics-based performance reviews along with the merit increase incentives are keys to running an effective call centre 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 centre. They'll always know exactly where they stand so when it comes to review time, there are no surprises.
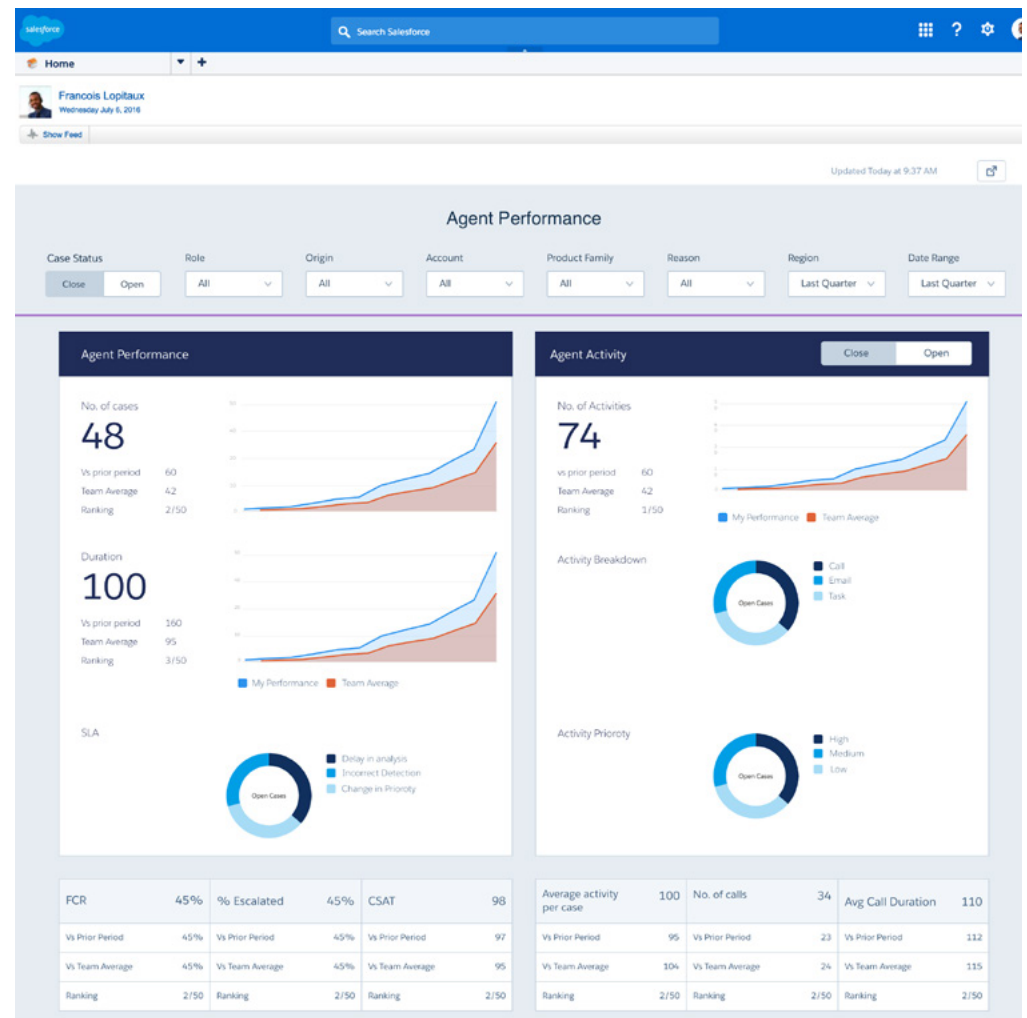
WHAT YOU'LL LEARN

Where do I stand with my performance metrics?

Is my performance improving over time?

How do I compare to my team with regards to CSAT and activity based metrics?

Will I meet my bonus targets with my current performance?

Conclusion

WHERE DO YOU GO FROM HERE?

Built on the Wave Analytics platform, Wave for Service is a ready-to-go analytics app that makes 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, this app boosts your CSAT scores and turns an average service department into a competitive differentiator. It delivers a new level of insight directly to any device, so 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 personalised customer service.

Think Wave for Service is right for your company? Contact your account executive today and learn how you can get up and running in minutes with the best analytics for Salesforce customers.

For more information on Wave for Service, Please visit **salesforce.com/au/analytics-cloud** or call **1800 667 638** (AU) **0800 450 064** (NZ).

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