Prodapt Chase Extraordinary

CRM and the Holy Grail of Personalization

Leverage Salesforce Communications Cloud to increase efficiency of care agents, while reducing overall TCO by 15%

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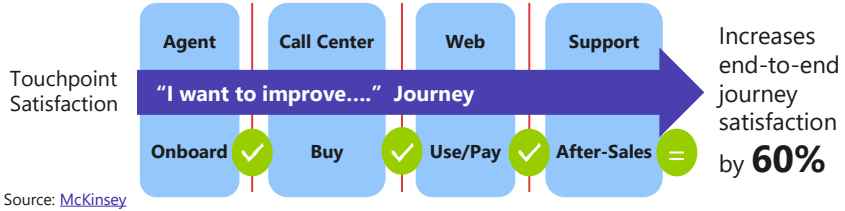
Great customer care drives a superior customer experience, but DSPs are **constrained by legacy CRM systems and a lack of standardized integrations**

As Digital Service Providers (DSPs) strive to deliver superior agent and customer experience, there is an urgent **need to modernize the customer care journey**

**CRM: Customer relationship management*

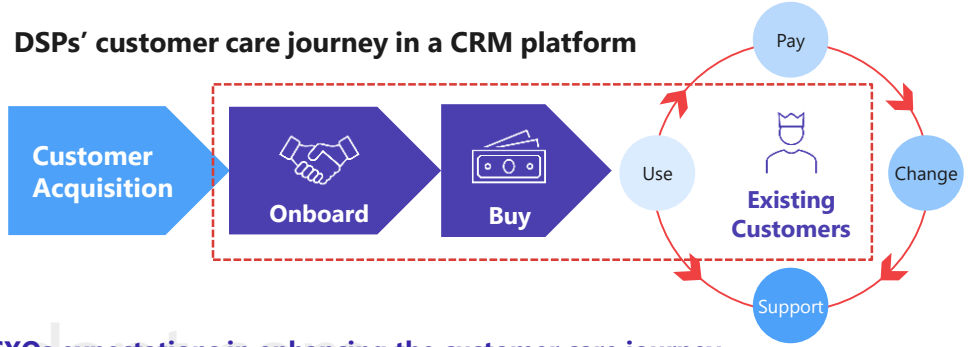
Modernizing the customer care journey across individual touchpoints will improve overall customer satisfaction by 60%



Source: McKinsey

"To achieve a superior agent and customer experience, there is a clear need for DSPs to **modernize the customer care journey using Salesforce Communications Cloud**

DSPs' customer care journey in a CRM platform



CXOs expectations in enhancing the customer care journey

- Reduce TCO
- Accelerate time-to-market of deployment
- Increase care agent's efficiency
- Increase upselling through personalization

Major challenges across customer care journey:

1. Multiple **legacy systems** impact the addressability checks and credit checks during customer onboard
   Lack of data consistency and cleanliness as the data is sourced from multiple systems
2. **Lack of standardized integration** hampers the order management flow
   Need for manual intervention impacts customer experience
3. **No scope for personalization** due to lack of recommendations on promotions and discount offers for customers

Key transformation focus areas to successfully modernize customer care journey with Salesforce Communications Cloud

Significance of modernization of customer care journey

TRANSACTIONAL		RELATIONSHIP-BASED
Organization -centric	**Customer care modernization** To exceed customer expectations while becoming more productive & efficient	1 Customer -centric
Transaction-focused		2 Value-focused
Reactive		3 Proactive
Remedy		4 Resolution
Generic		5 Personalized

CUSTOMER SERVICE → **CUSTOMER SUCCESS**

TRANSFORMATION FOCUS AREAS

Modernizing Onboard Journey

1 **Enhance data quality** to increase efficiency of care agents and gain account insights

2 **Transform onboarding** by improving accuracy of care agents' addressability check by 25%

Modernizing Buy Journey

3 **Orchestrate order with single CRM view** to reduce care agents' cycle time of O2A process in DSPs' quad play product portfolio

4 **Automate case assignment** of order errors, to improve the response time of care agents by 20%

Modernizing Journey for Existing Customers

5 **Empower care agents to provide hyper-personalization** to customers using Salesforce Customer 360

Customer 360 View

New customer | **Existing customer**

These transformation focus areas can ensure a successful modernization of customer care journey, thereby **enhancing the overall customer experience, and reducing the overall TCO by 15%**

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Enhance data quality to increase efficiency of care agents and gain account insights

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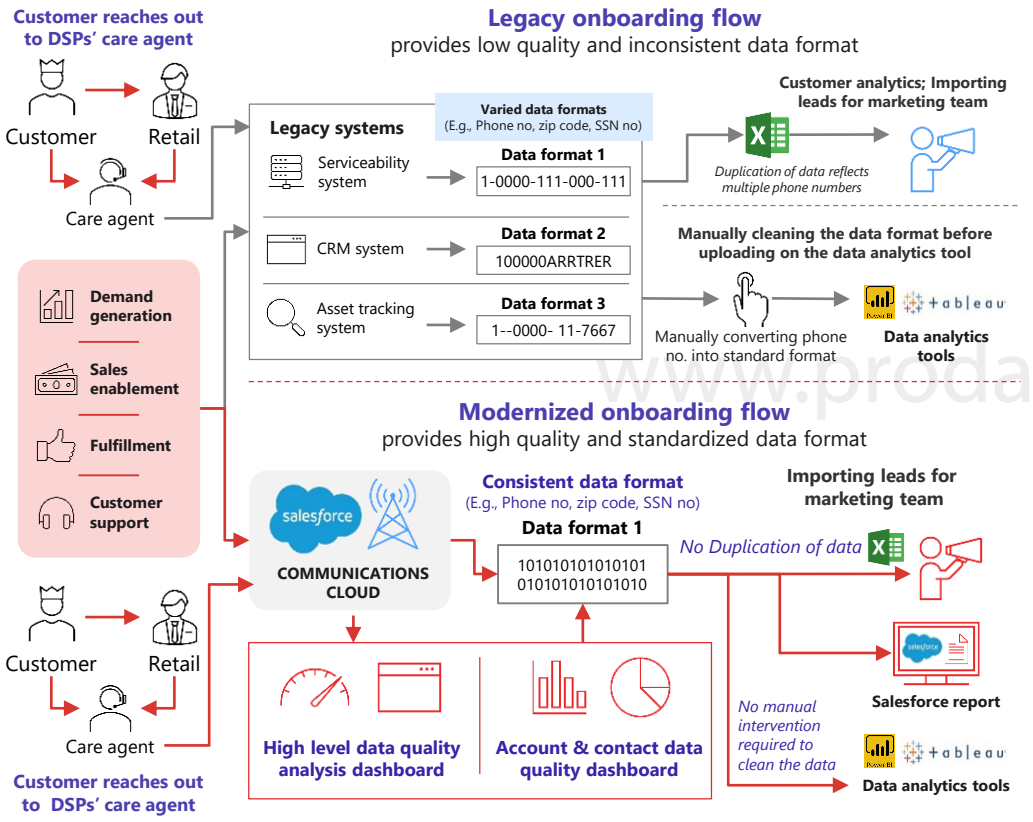

Challenges

- Several DSPs' CRM stack involves multiple legacy systems for different functions such as serviceability, asset tracking, etc. Each system captures customer details in unique formats, leading to duplication in the final output.
- These challenges affects overall productivity and efficiency of care agents.
- Furthermore, there is a need for manual intervention to verify and clean the data before it can be used by other teams such as marketing or business intelligence.

Recommendations

- **Use Vlocity Communications Data Model framework,** which is an **out-of-the-box** (OOTB) additive extension of the Salesforce data model to save deployment time of objects in the onboarding journey.
- **Use schema builder to do data mapping** across objects such as account level information, assets, etc., to enable quick build-time and minimal configuration.
- **Use DataRaptors to complement the insights given by the schema builder with** tools such as Turbo Extract, Extract, Load and Transform. Turbo extract for better runtime performance, Extract for complex mappings, Load to write data into Salesforce and Transform to support formats like PDFs.
- **Install a data quality app from AppExchange** such as **data8, Clean Suite, etc.** which can match the current records against a trusted source and suggest how the data can be improved.
- Use the **Duplicate Management feature** in Salesforce and install a **duplicate detection app such as DupeCatcher** from AppExchange.

Benefits

- Provides **single source of truth** for all data across onboard journey.
- **~30% reduction in data disparity**, by reducing the use of legacy systems.
- Increased efficiency of care agents.

Transform onboarding by improving accuracy of care agents' addressability check by 25%

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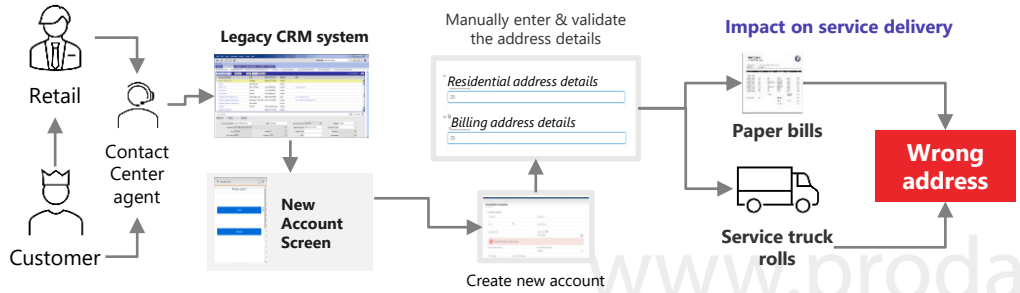
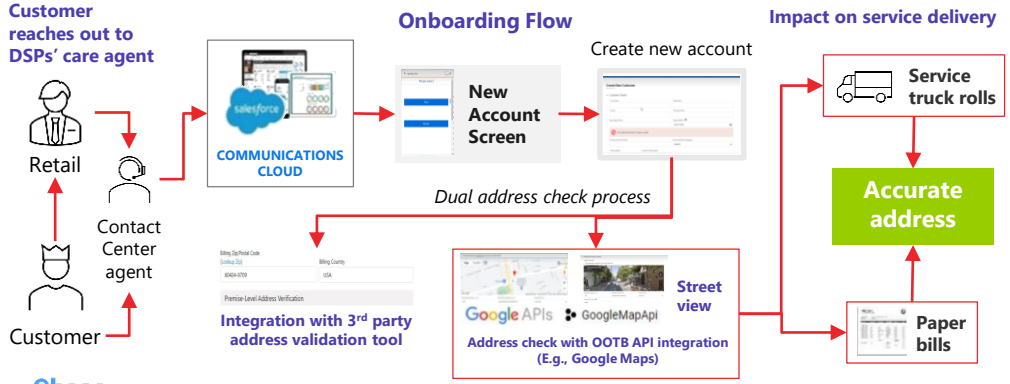
Addressability check in legacy onboarding flow

Inaccurate address due to manual entry impacts delivery of paper bills and efficiency of service trucks



Modernized addressability check with Google Maps integration in Salesforce Communications Cloud



Challenges

- Traditional onboarding flow involves manual entry and validation of address details, leading to increased time in onboarding process, inaccurate information or errors due to negligence.
- Inaccurate address in the system leads to delivery of paper bills and truck roll arrival at wrong location, resulting in disgruntled customers.

Recommendations

- **Implement typeahead block to** enable the care agents to **speed-up the new account creation** process. Using the typeahead block, care agent can save up to 90% of the keystrokes required to capture an address.
- **Use guided selling tool** to enable new care agents to accelerate sales process.
- **Implement Salesforce Einstein Smart Search tool**, to look up address information (billing, physical, shipping), with limited number of clicks.
- **Implement the Help text feature in combination with Salesforce validation rules**, which will ensure the preferred format of the address goes into the system.
- **Use out-of-the-box (OOTB) API integration** for both residential and billing address. The integrations can be reused across multiple implementations once built.

Benefits

- **20%-25% improvement** in accuracy of addressability check.
- Salesforce Einstein Search tool provides actionable instant look-up for details with minimal clicks.

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Orchestrate order with single CRM view to enable care agents to reduce cycle time of O2A process in DSPs' quad play product portfolio

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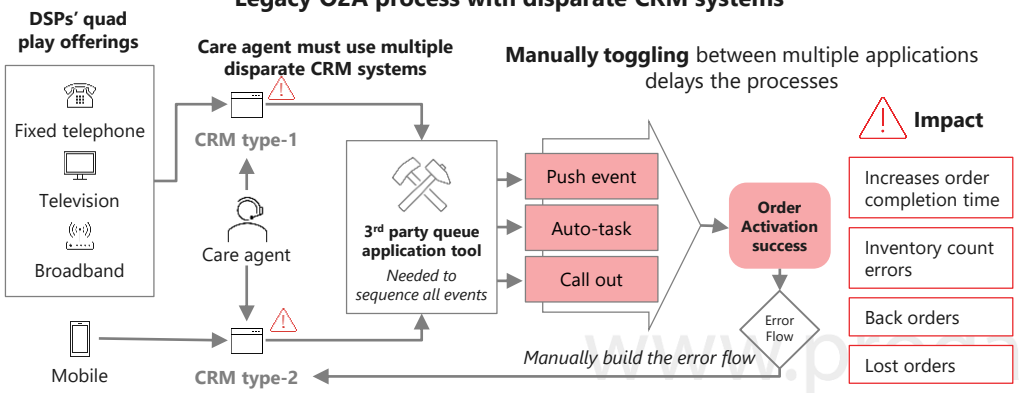
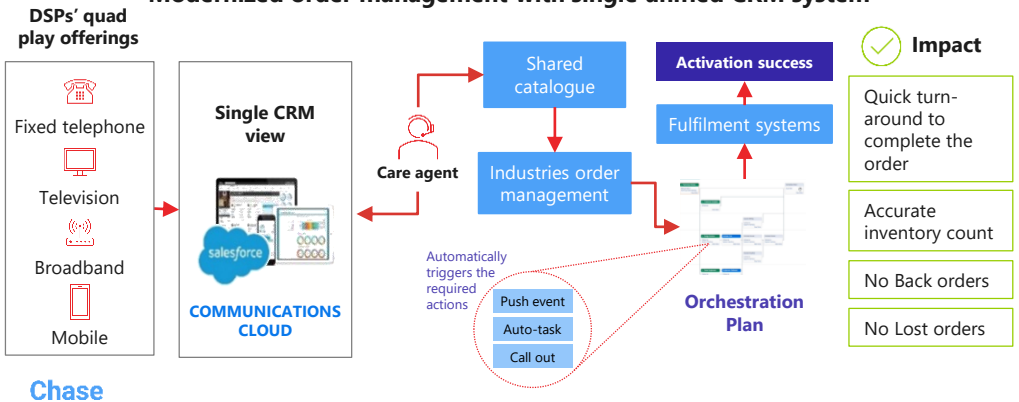
Legacy O2A process with disparate CRM systems



Modernized order management with single unified CRM system



Challenges

- With the increasing demand for quad play offerings, products/ services are managed in disparate CRM systems. Hence, the care agent is required to toggle between multiple systems, thereby leading to delayed processes, and low customer satisfaction.
- Furthermore, there is a frequent need for manual intervention, as managing orders in disparate CRM systems is complex.

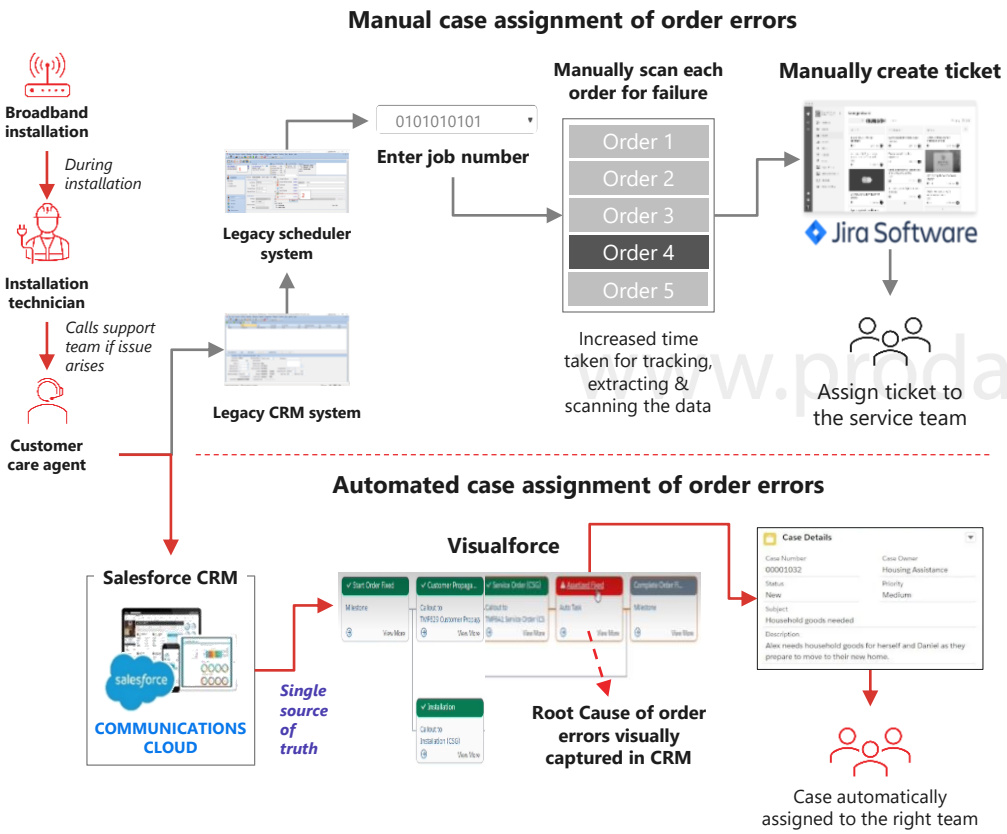
Recommendations

- **Use Salesforce Industries Order Management** to view the action items in a single screen. This allows for easy trouble shooting.
- **Leverage low code platform capabilities** to rapidly customize the business rules and deploy order management with minimal manual coding.
- **Leverage catalog** to dynamically generate fulfilment actions based on the order context.
- Create a queue to **achieve a predictive failure management** model, as the queue can be used to monitor items that are in the risk of failing.
- **Use Order Management to send the case to a queue:** When an order is in jeopardy of missing an expected date, Order Management can send the case to a Salesforce queue. Hence, operators can monitor an entire queue, rather than check individual orders to check if they're on time.
- **Use Process Library** for best practices on key workflows, thereby enabling quick lift & shift of action items, and allowing for a faster deployment time.
- Establish and **maintain connections to order fulfillment systems** and apply the correct logic to handle connections.

Benefits

- Order orchestration with Salesforce Communications Cloud reduces the cycle time of end-to-end order to activate process.
- It provides seamless integration with downstream systems.
- Systems like payments and shipping do not have to operate in silos.

Automate case assignment of order errors, to improve the response time of care agents by 20%



Challenges

- When an installation technician or customer calls the support team during an issue, the care agent must manually run multiple checks to identify the issue. This results in increased time taken during tracking, extracting & scanning of data.
- The care agent must manually create a ticket on Jira software and assign it to the service team.

Recommendations

- **Ensure that the active rule contains all the assignment entries** that the support team needs, because when an assignment rule is activated with incomplete entries, it disables any other assignment rules in the organization.
- **Create escalation rules to automatically notify** or reassign a case to a specific agent who can immediately resolve the case.
- **Create Profile and Permission Set** to allow Service Cloud users to access cases and manage service cloud console and other features.
- **Enforce business rules such as time limits**, to ensure that SLAs across billing, usage, logistics, etc. are met automatically.
- **Use Process Builder automation tool** post case assignment, to achieve custom requirements such as auto send of post on chatter, email etc.

Benefits

- Care agents can navigate through the swim lane view, which can be customized as per requirements.
- The swim lane APIs automatically highlights the issue, clicking on which the care agent can identify the source of the failure.
- Automation of case assignment **improves the response time by 20% per case.**

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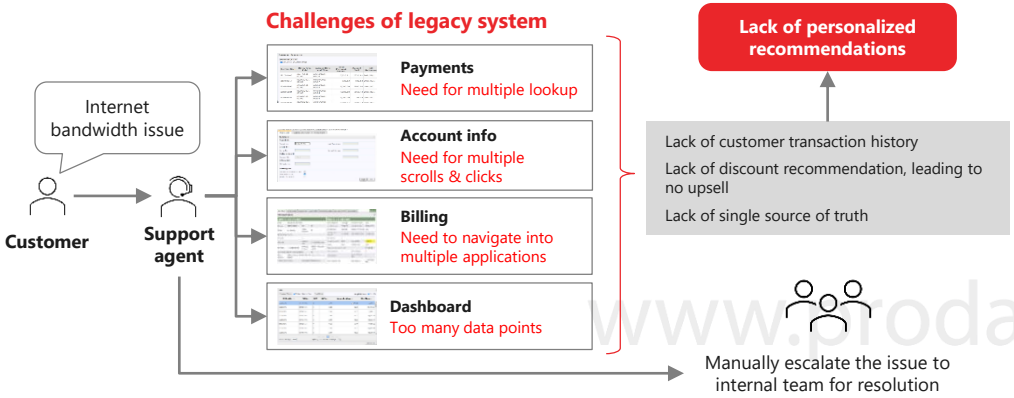
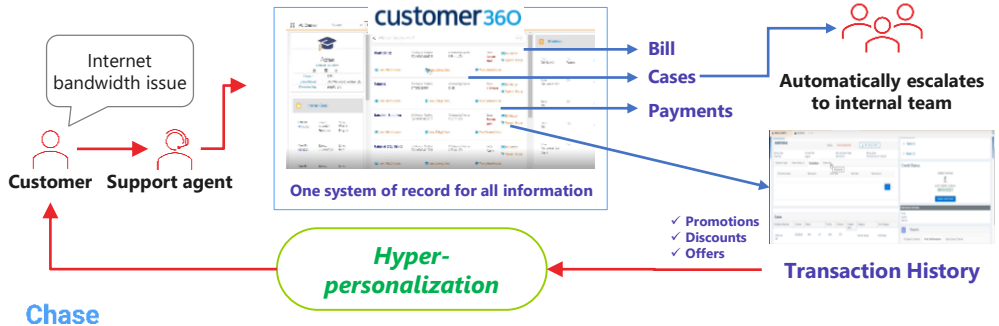
Empower care agents to provide hyper-personalization to customers using Salesforce Customer 360

Traditional call center journey for existing customers



Modernized journey for existing customers using Salesforce Customer 360



Challenges

- Care agent's day is spent on non-selling activities, because of lack of single source of truth.
- The care agent is required to toggle between multiple systems/ application to determine customer info, billing info and transaction history.
- There is a lack of recommendations on promotions and discount offers for customers.

Recommendations

- **Use FlexCards**, an out-of-the-box application, which enables developers **to build telco/ DSP-specific UI components** using the Lightning Web Components (LWC) framework.
- **Customize the TMF end points,** as per requirements, for billing, invoice, and data consumption information.
- Use **OmniScript to configure interactive processes** such as issues with subscription, hardware issues, etc.
- **Use DataRaptor**, a mapping tool, **to access data in both** Salesforce and external data sources such as a legacy system or a REST API.
- **Perform multi-source invocation** by consuming data from DataRaptors, Apex classes, microservices, and 3rd party systems.

Benefits

- Provide **hyper-personalized experience** to customers.
- Get customer insights and increase engagement through a unified platform.
- **~25% increase in upselling opportunities** for care agents.

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Benefits achieved by a leading DSP in Americas, after modernizing their customer care journey using Salesforce Communications Cloud

Next gen Customer experience with **Salesforce Communications Cloud**

20-30% increase in ARPU
from existing customers, due to hyper-personalized recommendations, for cross-selling/upselling.

60-70% faster time-to-market
due to Salesforce's OOTB features, standardized API formats, reusability of TMF API, etc.

25% reduction in TCO
due to low cost of Salesforce software implementation, support, and maintenance.

20 points increase in NPS
due to modernized case management and omni channel capabilities.

Transformation to a true
Digital Operator

**ARPU: Average revenue per user*
TCO: Total cost of ownership
NPS: Net promoter score

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