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%
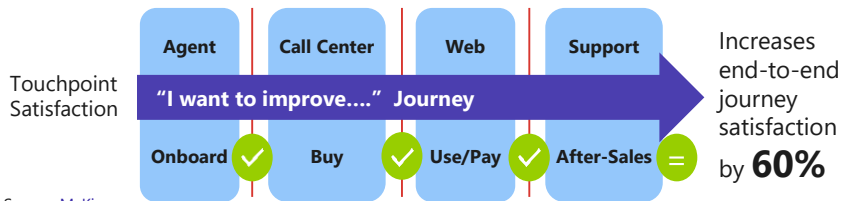
Credits | Manoj K Mohan | Rohit Karthikeyan

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**
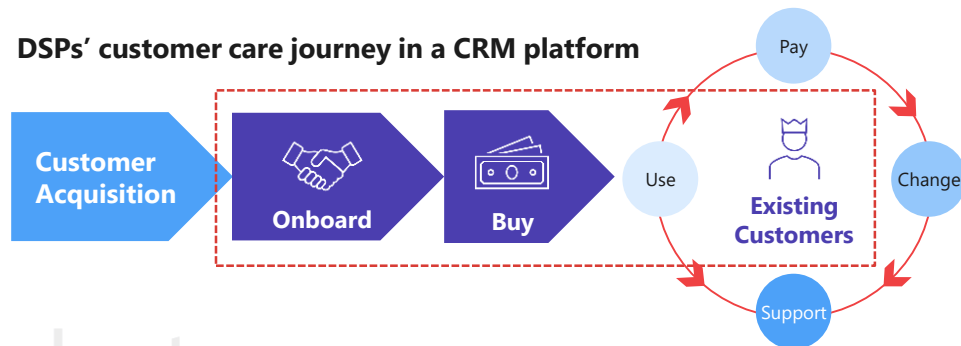
*CRM: Customer relationship management

DSPs' customer care journey in a CRM platform

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

Source: McKinsey

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

> " 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**

Chase Extraordinary

2

Prodapt

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

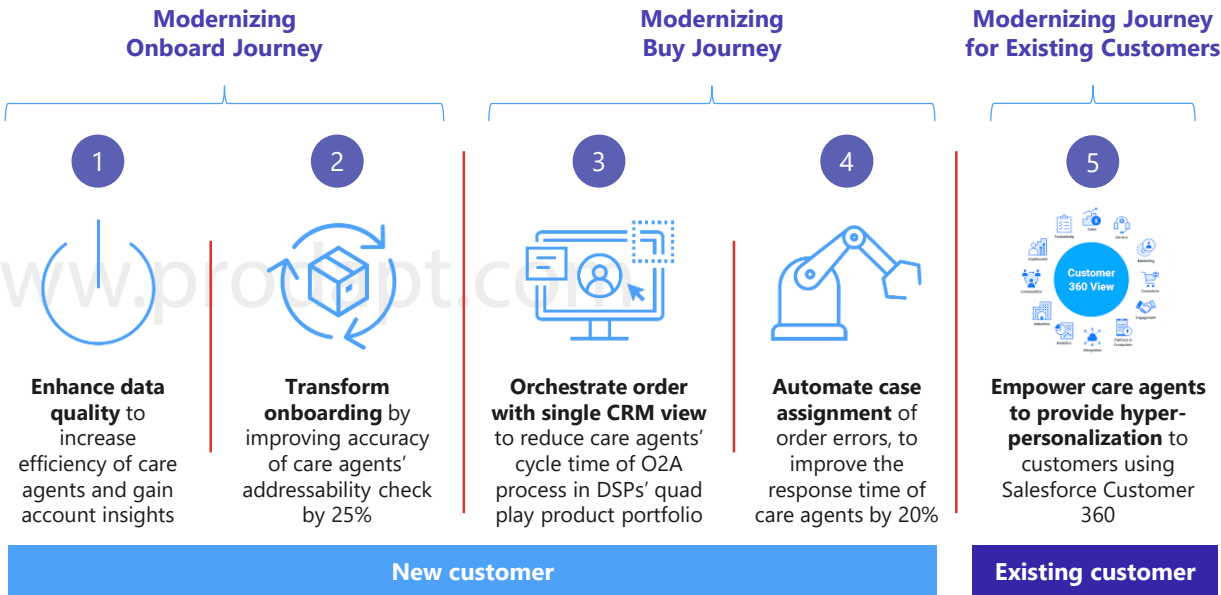## Significance of modernization of customer care journey

TRANSACTIONAL | RELATIONSHIP-BASED

Organization-centric → **1** Customer-centric

Transaction-focused → **2** Value-focused

Reactive → **3** Proactive

Remedy → **4** Resolution

Generic → **5** Personalized

Customer care modernization
To exceed customer expectations while becoming more productive & efficient

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
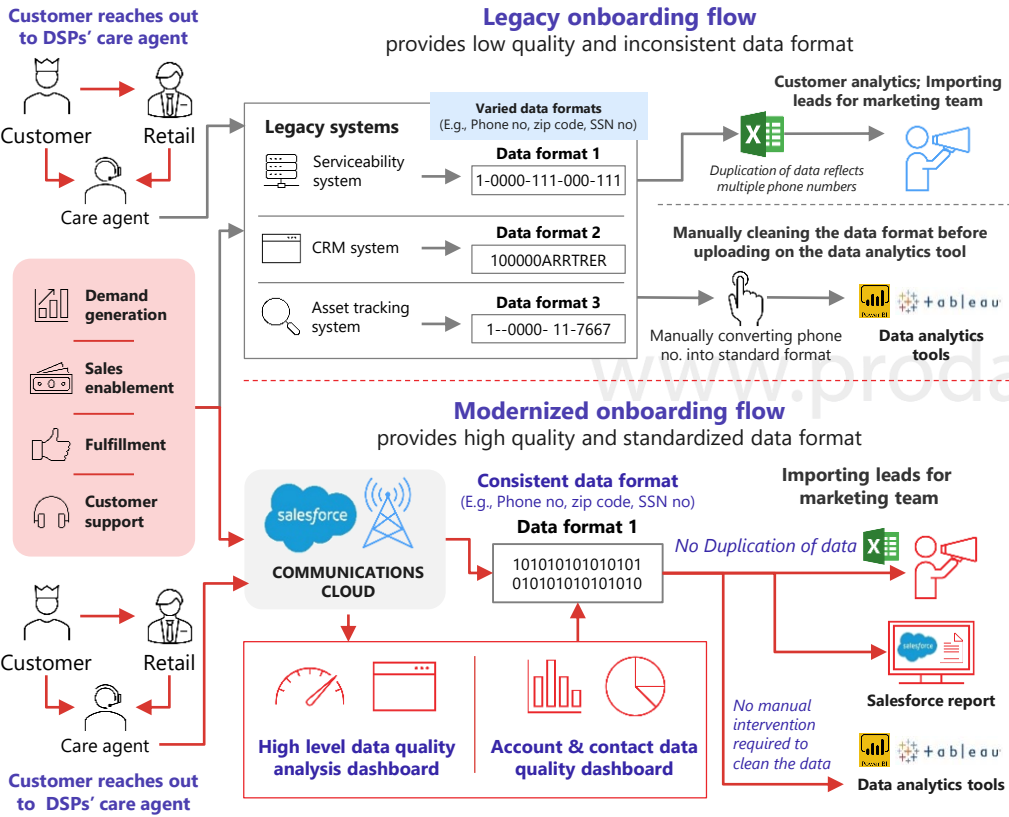
New customer | **Existing customer**

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%**

Chase Extraordinary

Prodapt

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

Legacy onboarding flow
provides low quality and inconsistent data format

Customer reaches out to DSPs' care agent

Customer — Retail

Care agent

Legacy systems

		Varied data formats (E.g., Phone no, zip code, SSN no)
Serviceability system	→	**Data format 1** 1-0000-111-000-111
CRM system	→	**Data format 2** 100000ARRTRER
Asset tracking system	→	**Data format 3** 1--0000- 11-7667

Customer analytics; Importing leads for marketing team

Duplication of data reflects multiple phone numbers

Manually cleaning the data format before uploading on the data analytics tool

Manually converting phone no. into standard format

Data analytics tools (tableau)

- **Demand generation**
- **Sales enablement**
- **Fulfillment**
- **Customer support**

Modernized onboarding flow
provides high quality and standardized data format

COMMUNICATIONS CLOUD (salesforce)

Consistent data format
(E.g., Phone no, zip code, SSN no)

Data format 1
101010101010101
010101010101010

No Duplication of data

Importing leads for marketing team

No manual intervention required to clean the data

High level data quality analysis dashboard

Account & contact data quality dashboard

Salesforce report

Data analytics tools (tableau)

Customer reaches out to DSPs' care agent

Customer — Retail

Care agent

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.
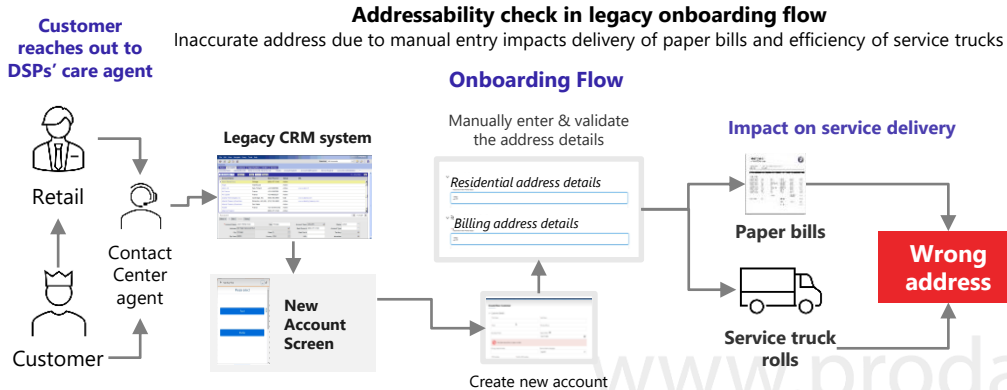
Recommendations

- 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.

Chase Extraordinary

Prodapt

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

Addressability check in legacy onboarding flow
Inaccurate address due to manual entry impacts delivery of paper bills and efficiency of service trucks

Customer reaches out to DSPs' care agent

Retail

Contact Center agent

Customer

Onboarding Flow

Legacy CRM system

Manually enter & validate the address details

Residential address details

Billing address details

New Account Screen

Create new account

Impact on service delivery

Paper bills

Service truck rolls

Wrong address

Modernized addressability check with Google Maps integration in Salesforce Communications Cloud

Customer reaches out to DSPs' care agent

Retail

Contact Center agent

Customer

Onboarding Flow

COMMUNICATIONS CLOUD

New Account Screen

Create new account

Dual address check process

Integration with 3rd party address validation tool

Billing Zip/Postal Code
Lookup Zip
60404-9709

Billing Country
USA

Premise-Level Address Verification

Google APIs ▸ GoogleMapApi

Address check with OOTB API integration (E.g., Google Maps)

Street view

Impact on service delivery

Service truck rolls

Accurate address

Paper bills

Chase Extraordinary

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.
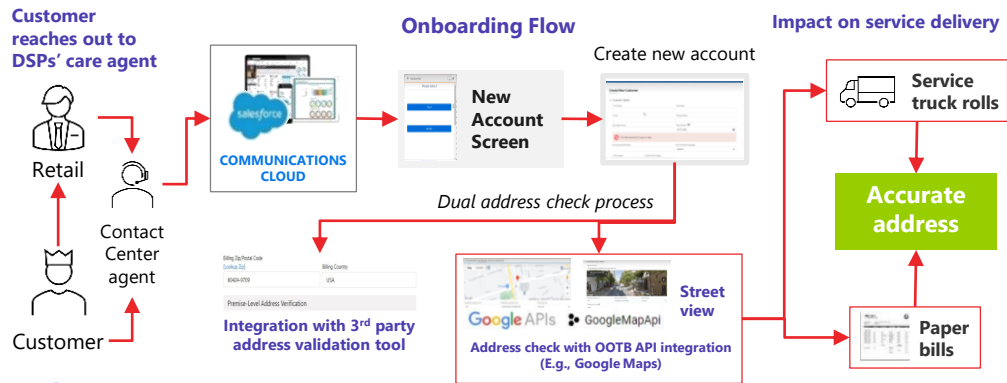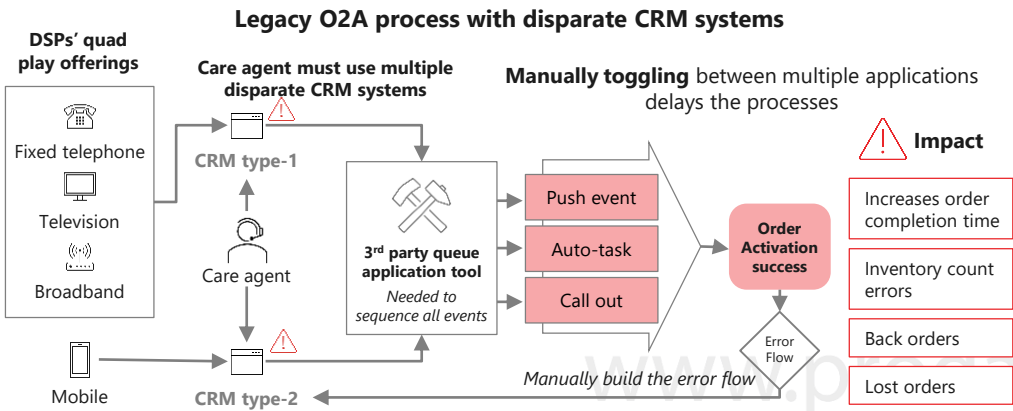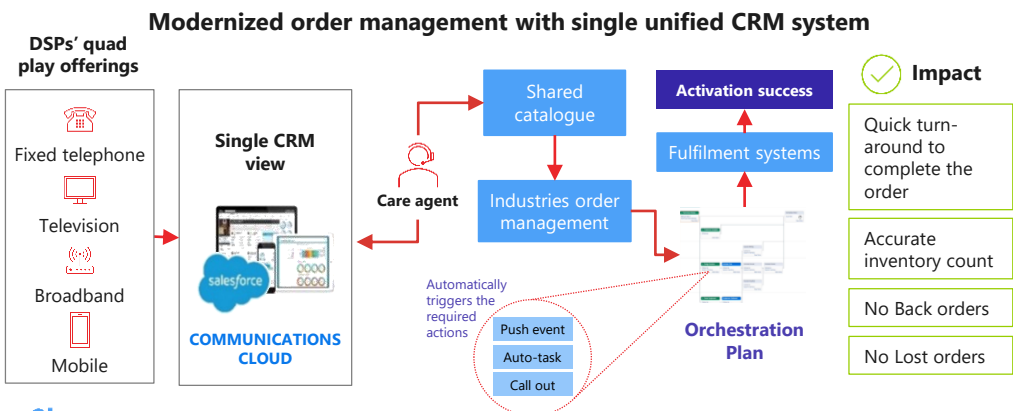
Benefits

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

Prodapt

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

Legacy O2A process with disparate CRM systems

DSPs' quad play offerings
- Fixed telephone
- Television
- Broadband
- Mobile

Care agent must use multiple disparate CRM systems

CRM type-1

Care agent

CRM type-2

3rd party queue application tool
Needed to sequence all events

Manually toggling between multiple applications delays the processes

- Push event
- Auto-task
- Call out

Manually build the error flow

Order Activation success

Error Flow

⚠ **Impact**
- Increases order completion time
- Inventory count errors
- Back orders
- Lost orders

Modernized order management with single unified CRM system

DSPs' quad play offerings
- Fixed telephone
- Television
- Broadband
- Mobile

Single CRM view

salesforce

COMMUNICATIONS CLOUD

Care agent

Shared catalogue

Industries order management

Automatically triggers the required actions
- Push event
- Auto-task
- Call out

Orchestration Plan

Activation success

Fulfilment systems

✓ **Impact**
- Quick turn-around to complete the order
- Accurate inventory count
- No Back orders
- No Lost orders

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.
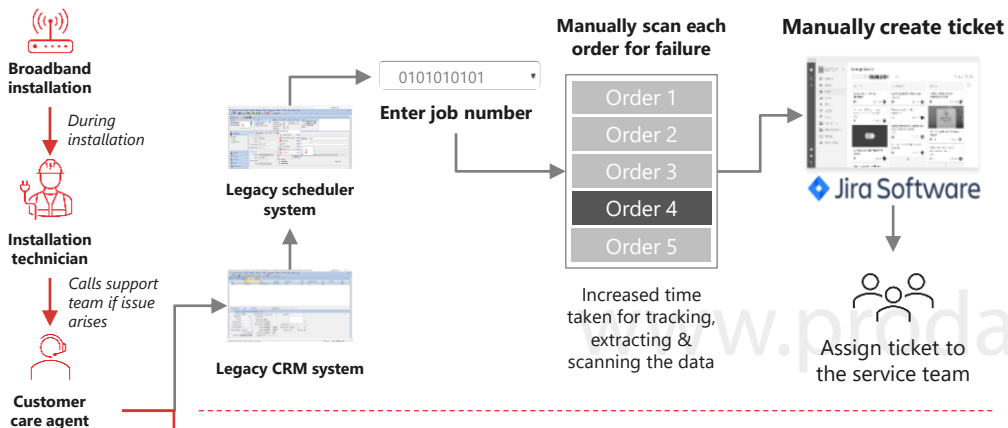
Benefits

- 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.
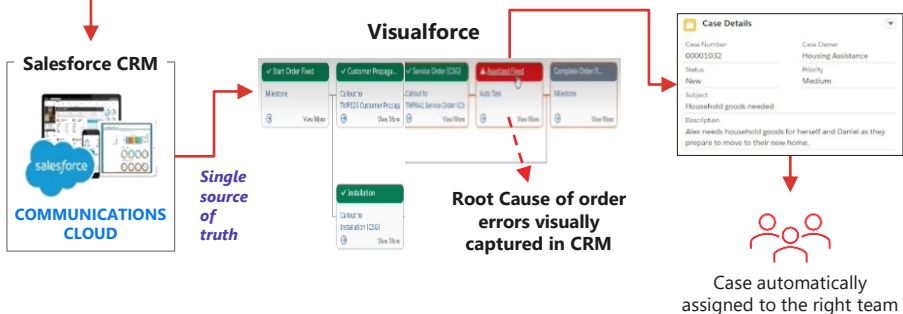- Systems like payments and shipping do not have to operate in silos.

Chase Extraordinary

Prodapt

6

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

Manual case assignment of order errors

Broadband installation

During installation

Installation technician

Calls support team if issue arises

Customer care agent

Legacy scheduler system

Legacy CRM system

Enter job number

0101010101

Manually scan each order for failure

Order 1
Order 2
Order 3
Order 4
Order 5

Increased time taken for tracking, extracting & scanning the data

Manually create ticket

Jira Software

Assign ticket to the service team

Automated case assignment of order errors

Salesforce CRM

salesforce

COMMUNICATIONS CLOUD

Single source of truth

Visualforce

Root Cause of order errors visually captured in CRM

Case Details

Case Number 00001032
Status New
Subject Household goods needed
Description Alex needs household goods for herself and Daniel as they prepare to move to their new homes.

Case Owner Housing Assistance
Priority Medium

Case automatically assigned to the right team

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.
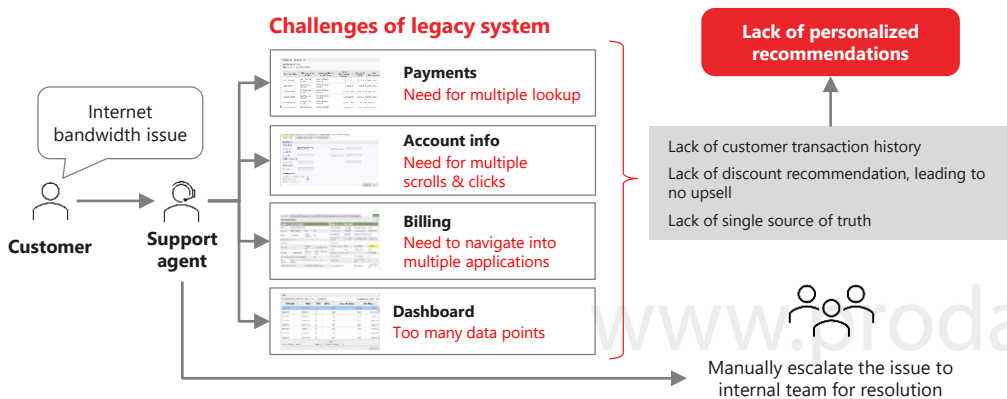
Benefits

- 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.
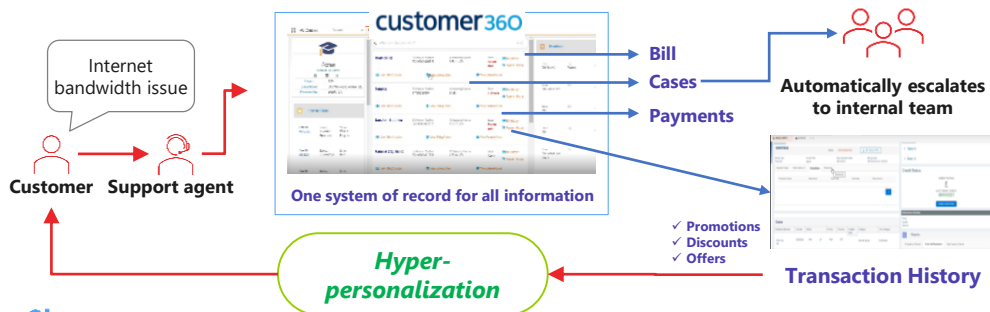- Automation of case assignment **improves the response time by 20% per case.**

Chase Extraordinary

Prodapt

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

Traditional call center journey for existing customers

Challenges of legacy system

Payments
Need for multiple lookup

Account info
Need for multiple scrolls & clicks

Billing
Need to navigate into multiple applications

Dashboard
Too many data points

Internet bandwidth issue

Customer **Support agent**

Lack of personalized recommendations

Lack of customer transaction history

Lack of discount recommendation, leading to no upsell

Lack of single source of truth

Manually escalate the issue to internal team for resolution

Modernized journey for existing customers using Salesforce Customer 360

Internet bandwidth issue

Customer **Support agent**

customer360

One system of record for all information

Bill
Cases
Payments

Automatically escalates to internal team

✓ Promotions
✓ Discounts
✓ Offers

Transaction History

Hyper-personalization

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.

Chase Extraordinary

8

Prodapt

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*

Chase
Extraordinary

9

Prodapt

Get in touch

USA

Prodapt North America, Inc.
Oregon: 10260 SW Greenburg Road, Portland
Phone: +1 503 636 3737

Dallas: 1333, Corporate Dr., Suite 101, Irving
Phone: +1 972 201 9009

New York: 1 Bridge Street, Irvington
Phone: +1 646 403 8161

CANADA

Prodapt Canada, Inc.
Vancouver: 777, Hornby Street,
Suite 600, BC V6Z 1S4
Phone: +1 503 210 0107

PANAMA

Prodapt Panama, Inc.
Panama Pacifico: Suite No 206, Building 3815
Phone: +1 503 636 3737

CHILE

Prodapt Chile SPA
Las Condes: Avenida Americo Vespucio Sur
100, 11th Floor, Santiago de Chile

UK

Prodapt (UK) Limited
London: 1 Poultry, EC2R 8EJ

Reading: Suite 277, 200 Brook Drive,
Green Park, RG2 6UB
Phone: +44 (0) 11 8900 1068

IRELAND

Prodapt Ireland Limited
Dublin: Suite 3, One earlsfort centre,
lower hatch street
Phone: +44 (0) 11 8900 1068

EUROPE

**Prodapt Solutions Europe &
Prodapt Consulting B.V.**
Rijswijk: De Bruyn Kopsstraat 14
Phone: +31 (0) 70 4140722

Prodapt Germany GmbH
Münich: Brienner Straße 12, 80333
Phone: +31 (0) 70 4140722

Prodapt Digital Solution LLC
Zagreb: Grand Centar,
Hektorovićeva ulica 2, 10 000

Prodapt Switzerland GmbH
Zurich: Muhlebachstrasse 54,
8008 Zürich

Prodapt Austria GmbH
Vienna: Karlsplatz 3/19 1010
Phone: +31 (0) 70 4140722

Prodapt Slovakia j.s.a
Bratislava: Plynárenská 7/A, 821 09

SOUTH AFRICA

Prodapt SA (Pty) Ltd.
Johannesburg: No. 3, 3rd Avenue, Rivonia
Phone: +27 (0) 11 259 4000

INDIA

Prodapt Solutions Pvt. Ltd.
Chennai: Prince Infocity II, OMR
Phone: +91 44 4903 3000

"Chennai One" SEZ, Thoraipakkam
Phone: +91 44 4230 2300

IIT Madras Research Park II,
3rd floor, Kanagam Road, Taramani
Phone: +91 44 4903 3020

Bangalore: "CareerNet Campus"
2nd floor, No. 53, Devarabisana Halli,
Phone: +91 80 4655 7008

Hyderabad: Workafella Cyber Crown 4th Floor,
Sec II Village, HUDA Techno, Madhapur

THANK YOU!

Chase
Extraordinary

Prodapt