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Ways to Improve Case and Knowledge Management

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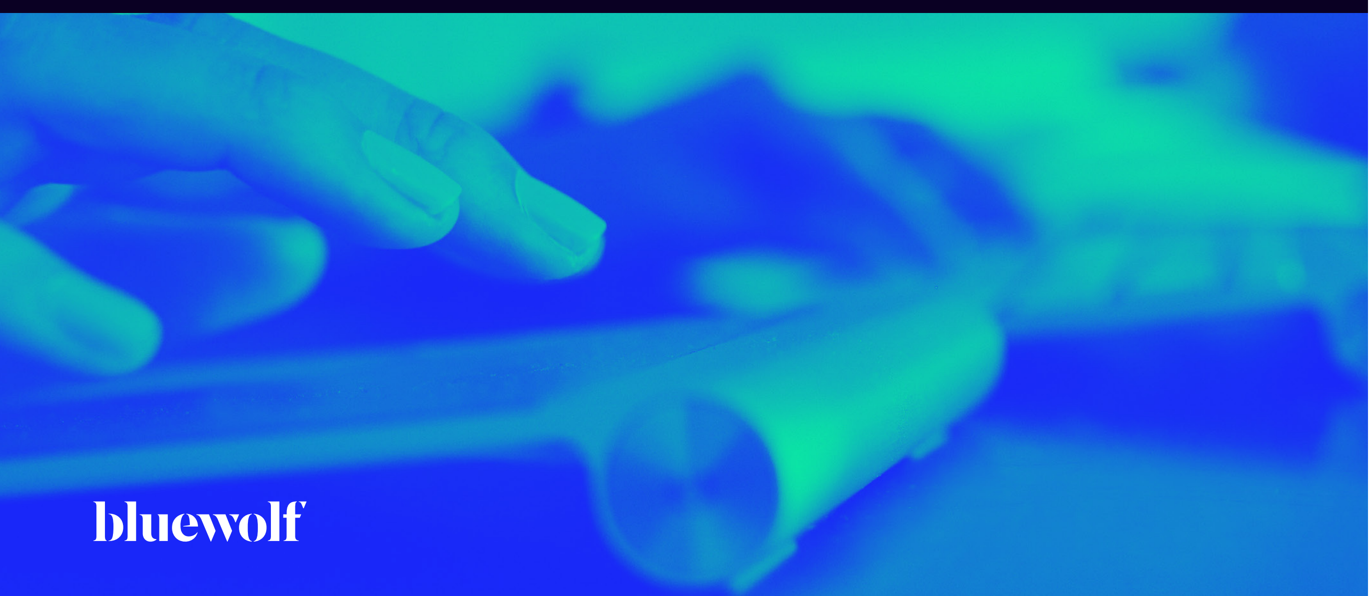
1 How many systems do agents have to use to manage an individual case?

A single interface is key to successful customer service.

When defining your organization's case management process, take an outward-in approach — bring all customer service information into a single user interface. Agents will be more efficient, not having to waste valuable time logging into and toggling between different systems, and new agent onboarding will be faster because they only have to be trained in one system.

Tip for Service Cloud Customers

Leverage Lightning Service Console, which allows agents to manage all customer interactions (from chat, social media, email, etc.) in a single user interface. The tabbed environment also lets agents look at many different groupings of records, even from different systems, on one screen.



3 Steps to Start Improving the Case Management Experience

1. Identify the most common case types. For most organizations, the same two or three cases take up a majority of agents' time.
2. Determine where agents are hitting roadblocks. It could be something small, like not having enough options in a picklist, or something larger, like too much time spent toggling between unintegrated systems.
3. Assess the level of effort and value of potential solutions. For example, measure the cost of integrating data sources between systems against the time agents would save by working within a single, automated system.

2 **Would you define your case management process as multi-channel or omni-channel?**

Embrace an omni-channel case management philosophy.

To be a successful omni-channel service provider, anyone from service should be able to record and see customer interactions on a unified contact record, regardless of the customer's original contact channel. When defining the case management process, consider how each channel is different — and what you can leverage to create a consistent experience.

Tip for Service Cloud Customers

Rely on tools such as Case Feed or Omni-Channel to help your organization manage multiple channels in a single location.

- **Case Feed** allows agents to view all interactions related to an individual case in a single view.
- **Omni-Channel** lets managers automatically assign cases to agents based on an agent's listed expertise, priority of cases, or agent's presence, reducing the amount of time cases are sitting idle in a queue.

Omni-Channel Service Maturity Scale

	Channels	Integration
High	Self-service portal Mobile app Social media SMS Video Google search YouTube	Agents can access a consistent and single interface, no matter the channel or type of case. Agents almost never have to log in to a different system or request information from an internal group to complete a case. Marketing, Sales, and Service have full visibility into each other's interactions with the customer.
Medium	Chat Web-to-case	The majority of cases can be handled using one interface and system. Agents have to log in to a few different system and sometimes request information from an internal group to close a case. Marketing, Sales, and Service have some visibility into each other's interactions with the customer.
Low	Phone Email	Agents regularly have to use different systems and rely on internal groups to close cases. Marketing, Sales, and Service have no or very delayed visibility into each other's interactions with the customer.

Have a documented escalation process that can be measured and improved.

Many companies believe they can simply implement a case management technology and watch the process fall into place — but technology without first esablishing a case management process will not solve an organization's problems.

Organizations must define how cases should be routed to agents, how often agents interact with cases, and how agents know when to escalate a case. By setting up service level agreements and escalations, the cases can be auto-assigned or escalated based on designated timelines. For example, if a customer email isn't answered by end of day, it automatically gets escalated to the top of tomorrow's queue. Agents can view customers' individual case queues or have cases automatically queued based on predesignated criteria.

Tip for Service Cloud Customers

Take advantage of Entitlements and Case Milestones in Service Cloud.

- With **Entitlements**, you can easily verify if customers are eligible for support, create and maintain service contracts for customers, and enforce service levels with automated processes that instruct agents on how to resolve cases.
- **Case Milestones** allow you to define critical steps in the service process and create alerts for "due dates" throughout — ultimately giving agents full visibility into what your organization expects of their resolution process.

3 Critical Things That Can Derail Your Escalation Process

1. **Agents don't understand the full escalation process.** It is unclear which milestones they need to hit while managing a case, and how long they have to accomplish each milestone. All this information needs to be accessible in a single interface, and each agent's status visible to managers.
2. **The process isn't automated.** The best customer service organizations program cases to pop back into queues when open, and route escalated cases based on agent experience and availability.
3. **Cases are never officially closed.** Always ask the customer if you can close a case. If gaining customer approval is a challenge, consider an external escalation process in which a customer is notified that a lack of response means they approve of the case closure.

Build a real-time feedback loop for agents.

Managers and agents should always be able to see the real-time status of all open cases. The best companies are enabling customers to give feedback immediately after every service interaction and coaching agents, as well as managers, on how to use feedback.

Tip for Service Cloud Customers

Take advantage of the native reporting and dashboards functionality to track KPIs in real time. These metrics should be both agent-specific, to keep agents motivated and accountable, and management-specific, allowing service managers to see the status of all open cases and spot lower-performing agents who need support.

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Measuring Success: Today's Top Service KPIs

The best metrics for determining the success of agents and of an organization are:

- **First call resolution.** How often do agents solve the customer's problem during the first interaction?
- **Number of customer interactions per resolution.** Does it take more than one interaction to solve the issue? More than five? The fewer, the better.
- **Outcome metrics about intended behavior.** Do certain types of cases always result in low net promoter scores?

Note: Reconsider average handle time.
Higher numbers here could mean that your organization is successfully diverting simple inquiries to self-service, and spending more time interacting with complex inquiries — which is a great step for your organization. Delve deeper into the types of cases agents are handling and set a new benchmark for average call time accordingly.

Ensure there is an automated process that checks data quality and alerts managers to potential errors.

The best companies invest in an automated process that continuously checks data quality and alerts customer service managers to potential problems. This allows them to run reports and be notified of errors themselves, instead of relying on IT to do so and report back. Deploying self-service tools also lets managers customize their data management in two ways: first, they can customize their own rules for data quality management, like always flagging case entries without a phone number; and second, they can incorporate “human tasks” into the workflow, like pausing automation to review, correct, and approve data quality exceptions throughout the process.

Tip for Service Cloud Customers

You do not have to start your data quality monitoring system from scratch. Depending on the complexity of your needs, there is everything from free Data Quality Analysis Dashboards on the Salesforce AppExchange to full-featured master data management solutions, like Informatica, that integrate with Service Cloud.

3 Data Governance Strategies

1. **Constrain data input.** Data validation rules, combined with required and unique fields, can limit incorrect information. Ensuring that picklist fields and lookups are used in place of “free text” fields are additional ways to constrain inputs.
2. **Integrate with trusted data sources.** A key challenge for many companies is keeping data up-to-date. Phone numbers, emails, and billing addresses can become outdated surprisingly fast. Third party data sources that verify addresses and supplement existing data with demographic data like age, gender, and household income can reduce the burden of manually entering data.
3. **Gamify desired behaviors.** The best people to put in charge of keeping the data clean are those who care about the quality of the data. Incentivize those same people with game-like challenges and data quality will improve. For example, award points based on a contact records completeness. If a record has 10 fields and only four are required, award points for completing the remaining six.

Define knowledge and make it accessible in one place.

Create a matrix that includes the location of all knowledge articles, who owns each article, whether it is internal or external, and the knowledge type, all of which will become the basis for future enhancements.

Tip for Service Cloud Customers

Salesforce Knowledge now allows users to access knowledge through a single interface without bringing every content repository into the platform. Whether an organization has a legacy knowledge management system or has other departments who manage knowledge in separate systems, agents can now use a single search to access all information.

Categorizing Knowledge: 6 Types You Need to Know

1. **Resolution-based** includes the typical question/solution article-type knowledge. As organizations start the knowledge process, this is the information that typically lives in training and in the heads of agents. They have a question and need a consistent answer. The question/solutions are often related to products and services.
2. **Policies and procedure** includes basic standard operating procedures. It can still be formatted into article-style question/answer, but focuses on the “how” as it relates to company policies and procedures.
3. **Regulatory and compliance** includes legal requirements, compliance issues, forms, or processes that must be followed due to safety or regulatory requirements.
4. **Marketing collateral** includes marketing collateral, brochures, and product or service details.
5. **Product documentation** includes product diagrams and schematics, manuals, product guides, etc.
6. **FAQ** includes frequently asked questions, typically provided on websites and portals. You might decide that this is an output of other categories, but companies still need to confirm the ability to manage and update FAQs, wherever they live.

Ensure agents can attach articles to each case, rate the articles, and see which articles are being used the most.

As agents use knowledge, edit it, and improve it, there must be ways to track success and bring the best knowledge to the top. When you are choosing a knowledge management solution, be sure to understand how the application learns success, and how it brings that knowledge forward based on usage and scoring.

Tip for Service Cloud Customers

Install Knowledge Base Dashboards and Reports, a free app from the AppExchange, to monitor your knowledge base and view knowledge metrics in real time without relying on IT. You can:

- Compare article ratings and reviews
- See how many articles have been created, updated, or published recently and by which user
- Easily determine which articles are helping solve the most cases

Evaluating and Scoring Knowledge Articles

Any organization, large or small, must have consistent metrics for rating the quality of knowledge articles. Formally documenting an Article Quality Index (AQI) will allow an organization to establish a structure for articles, score articles, and improve the quality of future articles. AQI questions should be customized to your organization, but to begin, start with the following:

- Has this article ever been read? If not, it is likely a duplicate or simply irrelevant to current products and services. Remove it.
- Are there many, slightly-different articles about the same topic? It's time to consolidate articles to make knowledge easier to find.
- Are your agents able to rate knowledge as they use it? If not, consider enabling a manual scoring model in order to further track article success.
- Are there instances in which no knowledge article is linked to a case? If so, there is an opportunity for one to be created to address that need.
- Is an article popular or used very often? If so, this could highlight a fundamental product or service issue that should be improved or reviewed.
- Does the article clearly define the problem, cause, and resolution? If not, create or revisit your article template.
- Does the article title and metadata reflect content? Ensure it is easy to find using the agent's search tool and, if public, via Google.

Establish a real-time process for authoring and updating knowledge.

Create knowledge content as agents solve issues — not after. Real-time authorship is integral to maintaining a knowledge base. Establish a process that allows agents to search for answers and, if the answer doesn't exist, enables them to request its creation and contribute their experience during or immediately after the customer interaction. Knowledge creation teams should be integrated with agents to respond quickly to requests, curate internal expertise that might already exist, and post new internal articles in real time.

Tip for Service Cloud Customers

Take advantage of Salesforce Knowledge's built-in article creation functionality for agents. When closing a case, allow agents to create a new article to capture important information and help solve future cases more quickly. Since agents are the ones using knowledge most frequently, enabling agent contributions improves the quality of knowledge and helps inform the knowledge creation team, who can monitor these articles and improve them.

How to Write the Best Knowledge Articles

Teaching agents how to effectively write knowledge articles accomplishes two things:

1. It makes it easier for agents to participate in the knowledge process.
2. Well-written articles mean that the knowledge creation team can more quickly review and publish new articles.

Start with the basics:

- Establish templates to make it clear what is required.
- Be impossible to misunderstand and limit overly technical language and jargon.
- Use steps and subheadings to make the article easy to scan and the solution easy to find.
- Stick with simple titles and make it easy to quickly determine an article's goal.

Invest in the knowledge user experience.

Of all the users of a knowledge base, customers have the least tolerance for a poor user experience. While agents have to navigate the knowledge base every day, customers are likely searching for something for the first time. If self-service is one of your strategies, content is as important as user experience.

Tip for Service Cloud Customers

Consider pairing Service Cloud with Community Cloud. Easily branded, mobile-friendly, and integrated with Salesforce Knowledge, Community Cloud is a good decision for companies that have decided to make self-service a part of their strategy.

3 Steps to Creating the Best Self-Service User Experience

1. Make sure every knowledge article has an expiration date and periodically review all content.
2. Allow agents to flag cases that require self-service content, thereby alerting the knowledge team and proactively serving customers the knowledge they need to help themselves.
3. Ensure the mobile self-service experience is intuitive; otherwise, customers will quickly switch to another channel.

Reward learning, collaboration, sharing, and improving.

Reward agents for their contributions and see a huge increase in the adoption and use of knowledge management. Most agents want to feel like their work is important; if they have the tools to reward them for collaboration and sharing of knowledge, they will participate in the knowledge process. There are many ways to do this — both manually and through gamification applications. The key is to find ways to reward collaboration across all areas of the company.

Tip for Service Cloud Customers

Enable collaboration using Chatter Answers, a self-service and support community that can be used internally (just for agents) or externally (for agents and customers). Users can post questions, collaborate publicly or privately to find answers, and like a post or article to indicate its usefulness. Chatter Answers also shows an agent's total number of posts and replies marked as "best answer" by others, making it easy to reward those who add the most to the community.

Gamification: Setting Up a Points Economy

- **Define clear goals.** What are the desired outcomes for the whole program, and what sorts of behaviors, above and beyond basic job requirements, support those outcomes?
- **Choose the right team.** An executive to champion the program, a technical expert who can modify the gamification platform, and a project manager to oversee the day-to-day are essential to success.
- **Focus on communications.** Everyone should know how to earn points, how many points they have individually, and where they stand in any leaderboard.
- **Innovate and automate.** The program will struggle if organizations do not update challenges or if they consistently add new challenges that require points to be awarded manually. Update challenges regularly and ensure points are automated.

Who We Are

Enter Bluewolf

Bluewolf is a global consulting agency that builds digital solutions designed to create results. Now. We're the proven Salesforce strategic partner for a reason—our technology-driven method combines our team's years of expertise with cloud solutions that continually connect our clients with their customers.

We design, build, and innovate on the Salesforce platform. Our core capabilities include Mobile, UI/UX, Change Management, Governance, and Analytics, and we have teams of experts who focus on solutions exclusively for Marketing, Sales, and Service.

We are a leader in Service Cloud implementations and solutions designed for customer service organizations. Our successful service clients include AmerisourceBergen, Australia Post, Berkshire Hathaway Travel Protection, Direct Connect, TE Connectivity, Stanley Black & Decker, and many more.

> "Since launching Service Cloud, we went from logging 20% of our cases to 100% of our cases. We've saved 2,000 hours per year.
>
> — **Joanna Sohovich**
> President IAR, Stanley Black & Decker

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Our Customer Service Expertise:

- **Service Blueprints** is a program focused on your long-term success, but designed to help your team begin achieving results now. Using the Bluewolf Blueprint method, Bluewolf helps you design a roadmap for the future in the areas of customer service, omni-channel, self-service, communities and portals, integrations, and the implementation of Service Cloud.
- **Service Cloud Implementations** are guided by our technology-driven method, which reduces deployment time by 50% and helps you connect with your customers more quickly.
- **Rep Rides** identify opportunities to improve your employees' experience and align technology to meet their needs. We ride along with employees as they interact with customers, gather data points about what's working and what could be improved, then propose process and technical solutions that increase effectiveness and align to your strategy.
- **Knowledge Management Accelerator Workshops** help companies adopt Knowledge Centered Support best practices. Each workshop is designed to educate and align stakeholders, and engage all participants to build a plan in real time.

What can we do for you NOW?

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