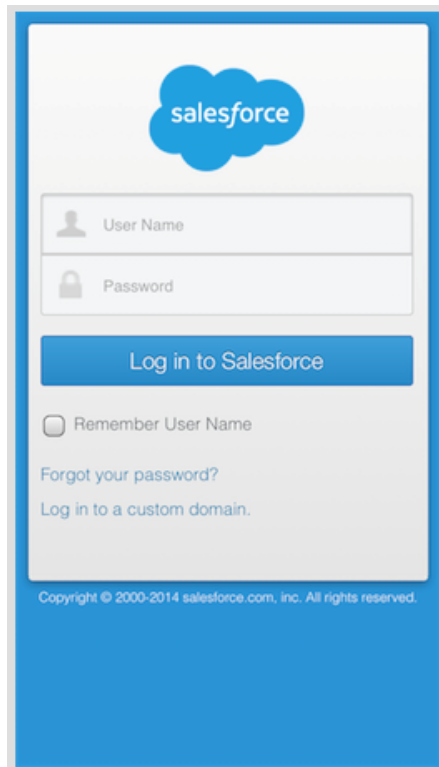


The background features a series of overlapping circles in shades of blue, purple, orange, and teal. Each circle contains a white icon: a lightning bolt, a speech bubble, a gear with a lightning bolt, a copyright symbol, and a group of three people. A white rectangular box is centered over the middle of the circles.

Incident Management Automation with Salesforce

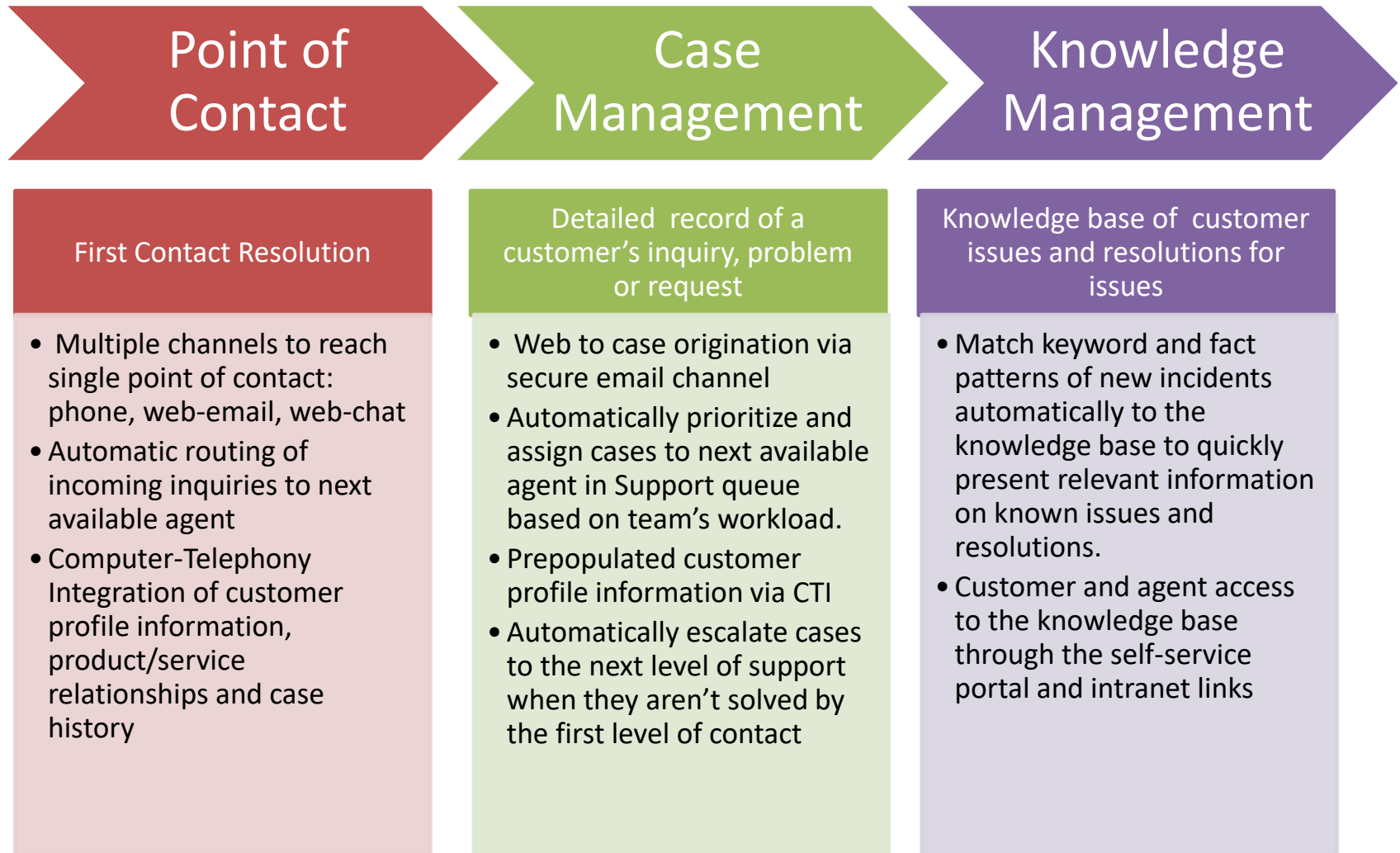
Presented by Michael Dulaney

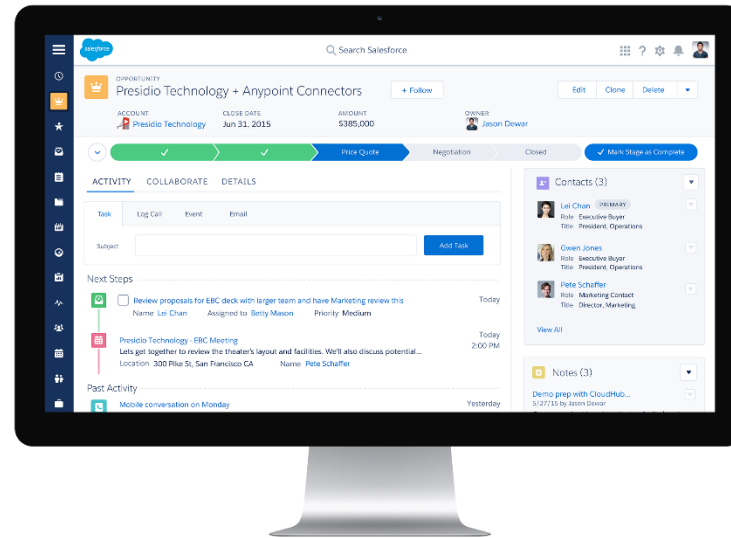
Salesforce Facilitates First Contact Resolution of Service Incidents



- Provides customers with access to a single point of contact for requesting support services
- Proactively embeds workflow automation and prioritization of incident tracking and resolution
- Tracks and reports incident statuses to detect underlying trends
- Communicates incidents that are impacting service availability to the entire support organization

3 Pillars of Incident Management Workflow Automation





SALESFORCE INCIDENT MANAGEMENT IN ACTION

Initial Customer Contact

1. Customer connects with contact center via dedicated phone VRU or secure website.
2. Customer enters account identification information via phone VRU, secure email or secure chat.
 - a. If connecting via secure email, customer also enters issue details in body of message.
3. Salesforce contact center integration connects with backend system of record to verify entered account identification information.
4. Salesforce contact center integration populates and displays verified customer account profile information in a new case screen to next available agent.
 - a. For email contacts, body of customer's message is displayed in Synopsis Description.

The diagram illustrates the initial customer contact process. Three contact methods (phone, email, and chat) are shown at the top, each with a blue circular icon. Arrows point from these icons to a Salesforce case screen. The screen displays a case titled 'Case 00340292' with various tabs and a 'Case Detail' section. The 'Case Detail' section includes a 'Headline Information' table with fields for Case Number, Case Owner, Case Origin, Contact Name, Account Name, End-User Account, Contact Email, Contact Phone, Product Group, Queue, Subject, Description, Type, Sub-Type, Priority, Status, Version, Component, Operating System, and New Project. A 'Synopsis' section is also visible at the bottom. A green callout box on the right side of the screen lists the customer profile information displayed: Name, address, and phone numbers; Customer contacts listing; Products/Services; and Case Notes.

Case Detail	
▼ Headline Information	
Case Number	00340292
Case Owner	
Case Origin	Phone
Contact Name	Brent Fox
Account Name	ABC Company (Test)
End-User Account	
Contact Email	
Contact Phone	608-362-7777
Product Group	BTS Document Outsourcing
Queue	BTS Client Services
Subject	Test Case
Description	Test
Type	General
Sub-Type	
Priority	2 (Medium)
Status	Open
Version	
Component	
Operating System	
New Project	<input type="checkbox"/>

▼ Synopsis

Subject Test

Description Test

CARE ID
Technical
Hierarchial ☐

Customer profile information

- Name, address, and phone numbers
- Customer contacts listing
- Products/Services
- Case Notes

Incident Identification, Logging and Categorization

1. Agent clicks on Edit to enable Case Edit.
2. Agent ascertains issue from customer and transcribes information in case details.
 - a. If customer contact is via chat, agent obtains description of customer's issue from chat window and inserts information in case details.
3. Agent selects the applicable category and type of issue.

Case 00340292

Printable View | Customize Page | Help for this Page

Case Comments (0) | Activity History (0) | Solutions (0) | Open Activities (0) | Case History (10) | Customer Satisfaction (0) | Attachments (0) | All Attachments (0)

Case Detail

Headline Information

Case Number: 00340292

Case Owner: Devin Fleming [Change]

Case Origin: Phone

Contact Name: Brent Fox

Account Name: ABC Company (Test)

End-User Account

Contact Email

Contact Phone: 608-362-7777

Product Group: BTS Document Outsourcing

Queue: BTS Client Services

Subject: Test Case [No Title]

Description: Test

Type: General

Sub-Type: Open

Priority: 2 (Medium)

Status: Open

Version

Component

Operating System

New Project

CARE ID

Technical

Hierarchical

Case Edit

Save | Save & Close | Save & New | Check Spelling | Cancel

Caller Information

Contact Name: Michael Dulaney

Account Name

Environment: Production

Implementation

Case Information

Case Number: 01589441

Case Owner: Michael Dulaney

Support Owner: User

Type: Service

Category: Bill Pay Issue

Product: BB

Case Origin: Phone

Status: Open

Priority: 3 (Low)

Severity: 3 (Low)

Synopsis

Subject: Bill Pay Issue

Description: Test

Escalation/Additional Information

Defect Number

Next Action: --None--

Next Action Description

Next Action Required By: User

Investigation and Diagnosis

1. Salesforce leverages keywords entered in Type, Category and Synopsis Description to search for and display possible solution recommendations to the agent from the Knowledge Base.
2. Agent reviews list of recommended solutions for a possible match to the customer's issue.

Case Edit [Save] [Save & Close] [Save & New] [Check Spelling] [Cancel]

Caller Information ⓘ = Required Information

Contact Name: Michael Dulaney
 Account Name:
 Environment: Production
 Implementation: ☐

Case Information

Case Number: 01589441
 Case Owner: Michael Dulaney
 Support Owner: User
 Type: Service
 Category: Bill Pay Issue
 Product: BB
 Case Origin: Phone
 Status: Open
 Priority: 3 (Low)
 Severity: 3 (Low)

Synopsis

Subject: Bill Pay Issue
 Description: Test

Solutions Home [Help for this Page]

Enter keywords to find matching solutions.
 Search for: [] in Commercial Banking [Find Solution]

Browse Solutions

[All Solutions](#) \ [BT Public Solutions](#) \ Commercial Banking

Subcategories in "Commercial Banking"

[Business Banking](#) [Business Financial Solutions](#)
[Information](#) [Training](#) [How To](#) [General](#) [Glossary...](#)

Solutions in "Commercial Banking" and Subcategories [Sort by: Most Commonly Used]

Solution Title	Related Cases	Status	Last Modified Date
Test KB Input -	1	Not reviewed	9/13/2012
BFS: Corporate Users - Admin Report	1	Reviewed	11/7/2012
Intuit Financial Services Work Order	0	Not reviewed	9/13/2012
RCA Service Issue Response: Internet Banking, Business Banking Issue October 4, 2011	0	Not reviewed	9/13/2012
Transaction Type Codes Added to Production Do Not Always Get Updated in Preprod	0	Not reviewed	9/13/2012
BFS Customer Requests a DPV Conversion	0	Not reviewed	9/13/2012
How much Business Banking History can be displayed	0	Not reviewed	9/13/2012
Business Banking Timeout Screen - Can it be edited?	0	Not reviewed	9/13/2012

Knowledge base of customer issues and resolutions for those issues

- Solution topics by product
- Quick links to recently viewed solutions
- Solution articles can also be available to customers through user community web page.

Resolution and Recovery

1. Agent locates and clicks on link of recommended solution that best matches the customer's issue.
2. Salesforce displays the selected Solution Detail page.
3. Agent walks customer through troubleshooting steps as denoted on Solution Detail page.
 - a. If customer contact is by email, agent creates email response with solution details.
 - b. If customer contact is by chat, agent inserts link to solution details in chat window.

Solutions Home Help for this Page

Enter keywords to find matching solutions.

Search for: in Commercial Banking Find Solution

Browse Solutions

[All Solutions](#) \ [BT Public Solutions](#) \ [Commercial Banking](#)

Subcategories in "Commercial Banking"

[Business Banking](#) [Business Financial Solutions](#)

[Information](#) [Training](#) [How To](#) [General](#) [Glossary](#)

Solutions in "Commercial Banking" and Subcategories Sort by: Most Commonly Used

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Transaction Type Codes Added to Production Do Not Always Get Updated in Preprod	0	Not reviewed	9/13/2012
BFS Customer Requests a DPV Conversion	0	Not reviewed	9/13/2012
How much Business Banking History can be displayed	0	Not reviewed	9/13/2012
Business Banking Timeout Screen - Can it be edited?	0	Not reviewed	9/13/2012

Solution Test KB Input - Customize Page | Printable View | Help for this Page

[Attachments \(0\)](#) | [Cases \(1\)](#) | [Solution History \(1\)](#) | [Solution Categories \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#)

Solution Detail Edit

▼ **Solution Information**

Solution Number: 00025830

Visible in Self-Service Portal: ☐

Attachment: ☐

Status: Not reviewed

For use in:

▼ **Detail Information**

Solution Title: Test KB Input -

Solution Details: Test KB Input

Product:

Intuit Title

More Information

Agent Notes

Agent Notes For Full Article

▼ **System Information**

Created By: [Nebiyu Ergete](#), 9/13/2012 2:21 PM

Solution Record Type: BT US C-Banking Solutions [\[Change\]](#)

Last Modified By: [Nebiyu Ergete](#), 9/13/2012 2:21 PM

Edit

Incident Closure or Escalation

1. If recommended solution is successful with customer, agent enters resolution in Synopsis Description, changes Status to Resolved then clicks Save & Close case.
2. If recommended solution is not successful, agent repeats viewing list of other recommended solutions.
 - a. If no matches are found, agent assesses the impact of the issue then assigns Priority and Severity to customer's issue.
 - b. Agent selects Status for next level support then saves case for escalation. Case is routed to next available Level 2 agent for resolution for follow-up with customer.
3. If agent finds an unpublished solution for customer, agent transcribes information in case details.
 - a. Agent selects Next Action of Create Knowledge article and enters information from case details in Next Action Description.
 - b. Agent clicks to Save & Close case.
 - c. Case is routed to Knowledge Manager for entry of new article in Knowledge Base.

Case Edit [Save] **Save & Close** [Save & New] [Check Spelling] [Cancel]

Caller Information ! = Required Information

Contact Name: Michael Dulaney
Account Name:
Environment: Production
Implementation: ☐

Case Information

Case Number: 01589441
Case Owner: Michael Dulaney
Support Owner: User
Type: Service
Category: Bill Pay Issue
Product: BB

Case Origin: Phone
Status: Open
Priority: 3 (Low)
Severity: 3 (Low)

Synopsis

Subject: Bill Pay Issue
Description: Test

Escalation/Additional Information

Defect Number:
Next Action: --None--
Next Action Description:
Next Action Required By: User

Summary of Key Benefits

Salesforce service and support automation helps companies be successful with incident management by:

- Ensuring that standardized workflows, recordkeeping and ongoing case management are used for efficient and prompt response
- Increasing visibility and communication of incidents and resolutions to business and support staff
- Increasing satisfaction through a seamless customer experience