Incident Management Automation with Salesforce

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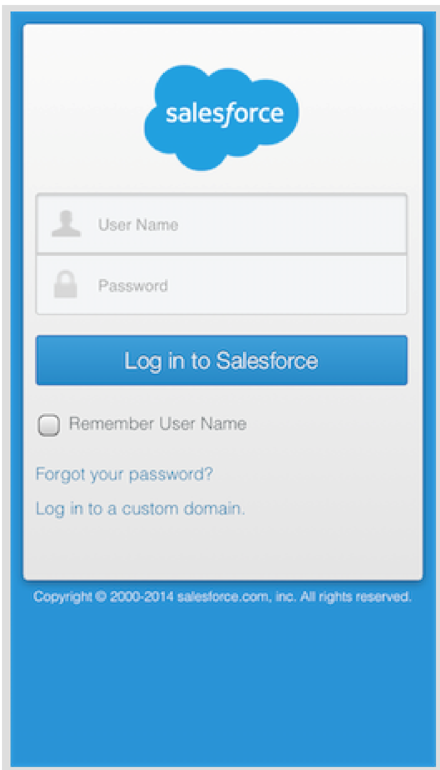
Salesforce Facilitates First Contact Resolution of Service Incidents



- 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

Point of Contact

First Contact Resolution

- Multiple channels to reach single point of contact: phone, web-email, web-chat
- Automatic routing of incoming inquiries to next available agent
- Computer-Telephony Integration of customer profile information, product/service relationships and case history

Case Management

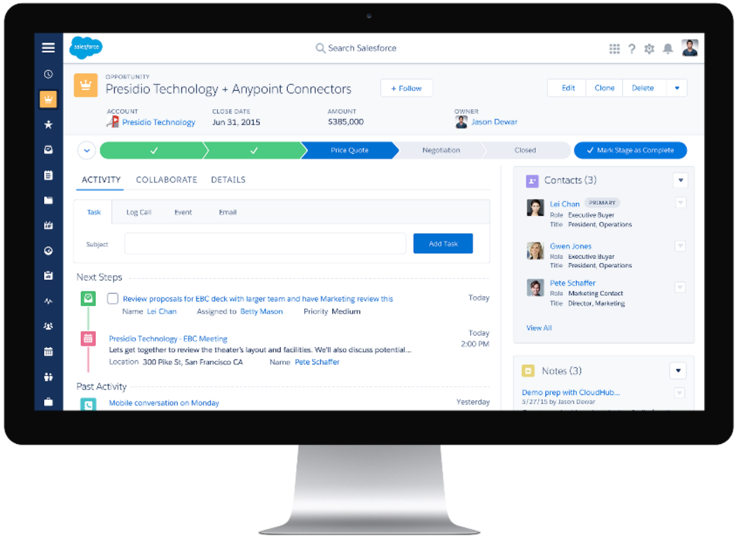
Detailed record of a customer's inquiry, problem or request

- Web to case origination via secure email channel
- Automatically prioritize and assign cases to next available agent in Support queue based on team's workload.
- Prepopulated customer profile information via CTI
- Automatically escalate cases to the next level of support when they aren't solved by the first level of contact

Knowledge Management

Knowledge base of customer issues and resolutions for issues

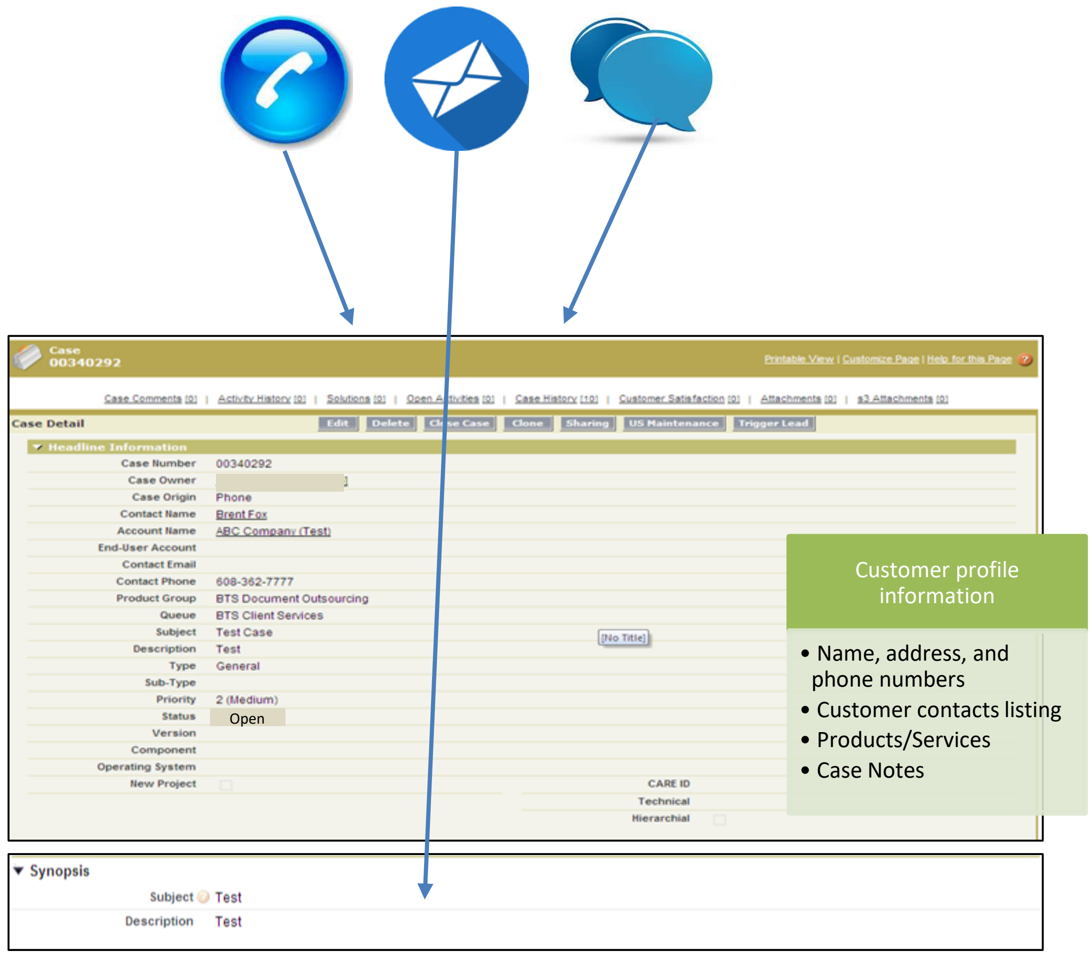
- Match keyword and fact patterns of new incidents automatically to the knowledge base to quickly present relevant information on known issues and resolutions.
- Customer and agent access to the knowledge base through the self-service portal and intranet links



SALESFORCE INCIDENT MANAGEMENT IN ACTION

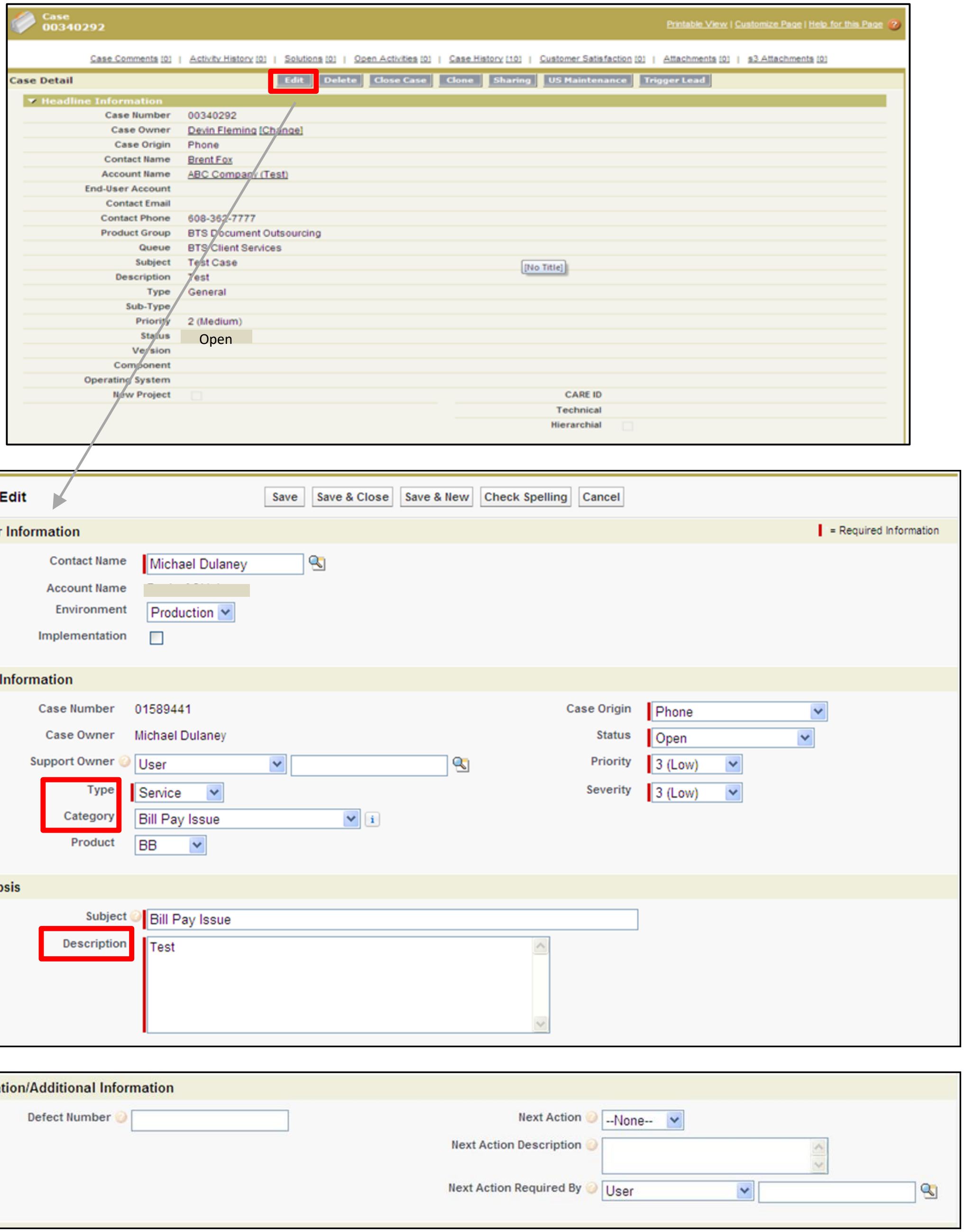
Initial Customer Contact

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.



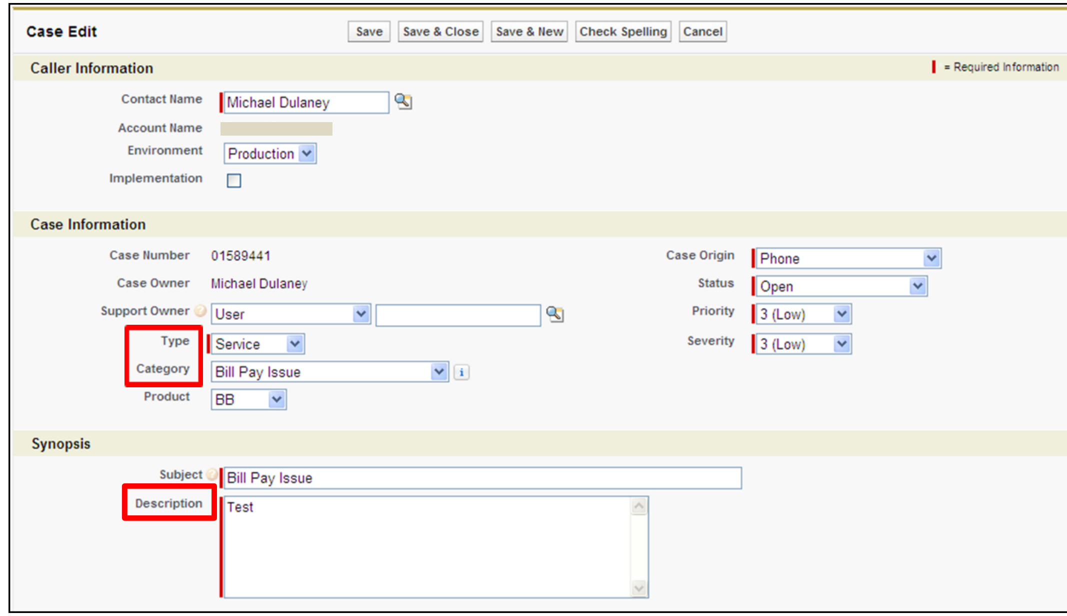
Incident Identification, Logging and Categorization

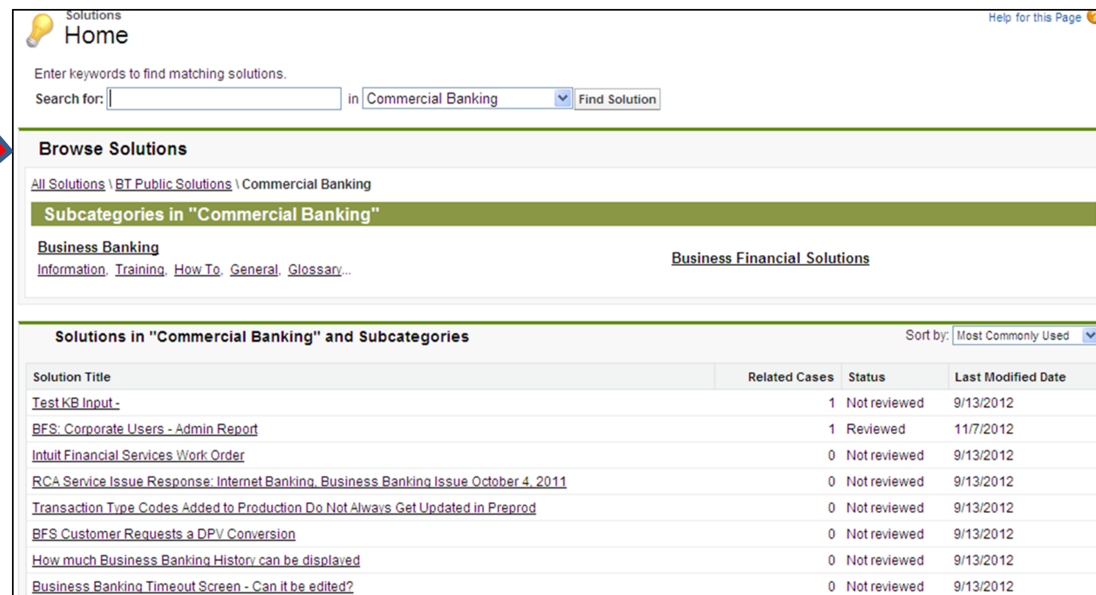
1. Agent clicks on Edit to enable Case Edit.
2. Agent ascertains issue from customer and transcribes information in case details.
   a. If customer contact is via chat, agent obtains description of customer's issue from chat window and inserts information in case details.
3. Agent selects the applicable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



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.



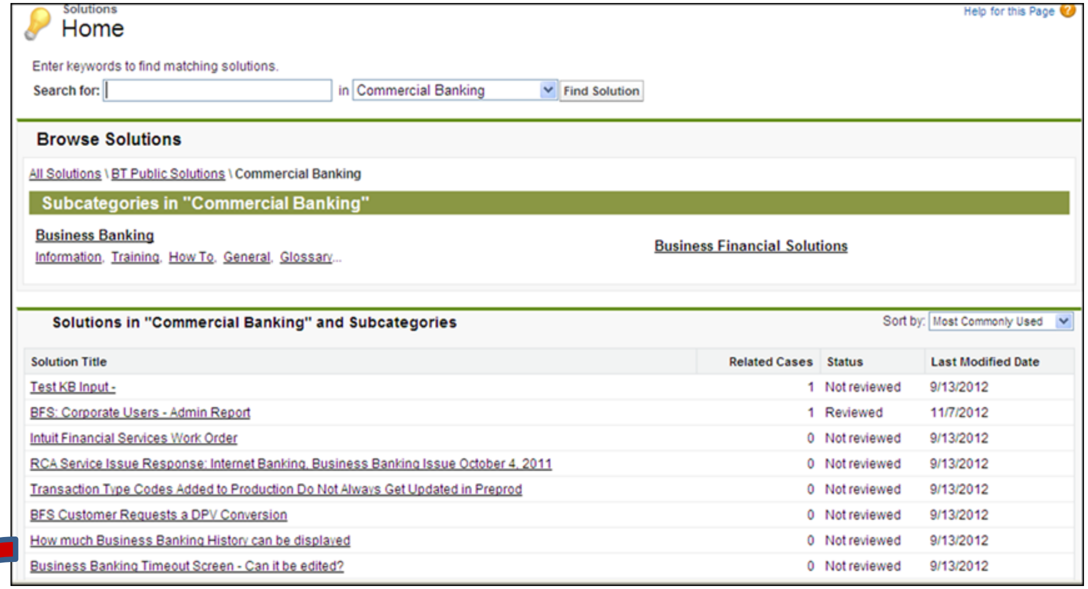


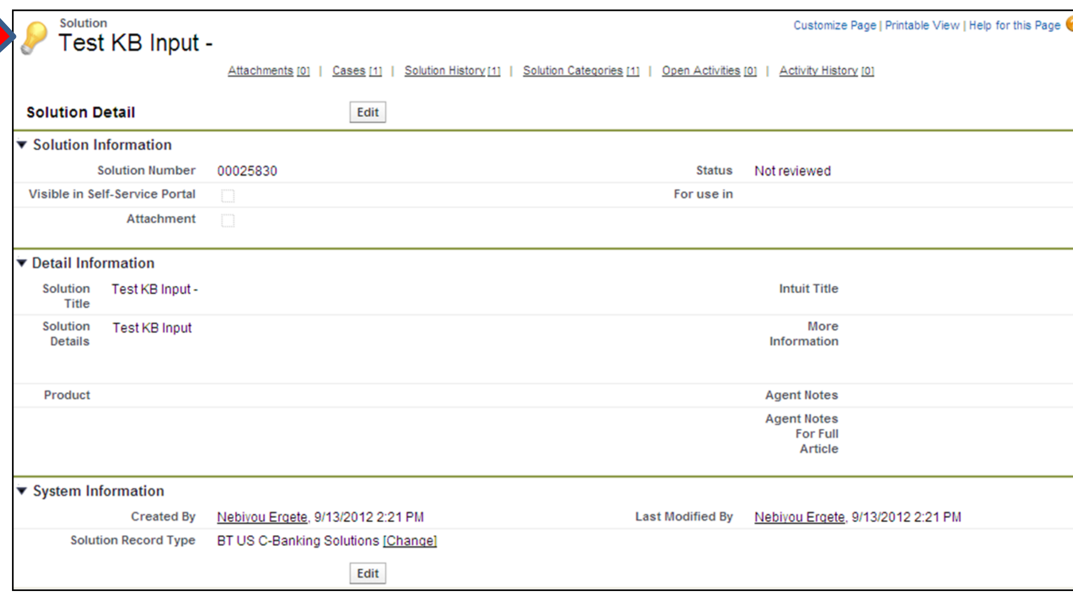
Knowledge base of customer issues and resolutions for those issues

- 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

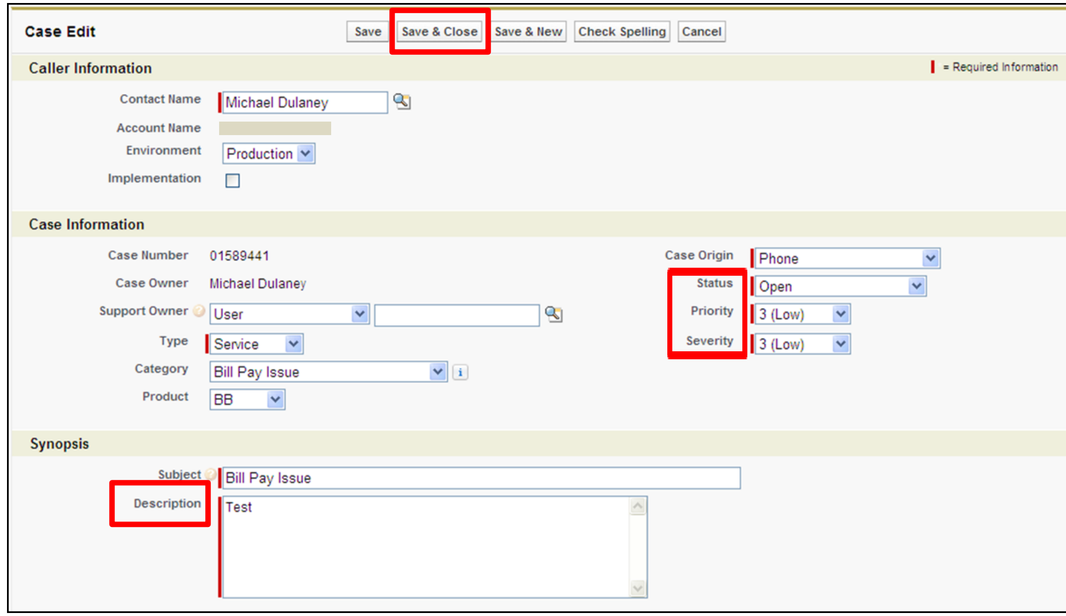
1. Agent locates and clicks on link of recommended solution that best matches the customer's issue.
2. Salesforce displays the selected Solution Detail page.
3. Agent walks customer through troubleshooting steps as denoted on Solution Detail page.
   a. If customer contact is by email, agent creates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





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.



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