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Frameworx 16.0 Solution Conformance

Salesforce solution for omni-channel service in Communications

Self-Assessment Process Mapping Report

Customer Support & Readiness (1.3.1)

Version 1.0
February 2017

Salesforce is applying for Conformance Certification for its leading industry solution on omni-channel service.

This report maps Business Process Framework processes that can be supported by supporting products from Salesforce.

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1 1.3.1 Customer Support and Readiness

1.1 1.3.1.1 Support Customer Interface Management

1.1.1 1.3.1.1.1 Ensure Customer Interface Capability

LEVEL 4 PROCESS MAPPING DETAILS
1.3.1.1.1 Ensure Customer Interface Capability

Brief Description

Not used for this description.

Extended description

Ensure that there is capability (for example, information, materials, systems and resource) so that the Customer Interface Management processes can operate effectively when a contact with a customer occurs. Examples are information on how to handle unusual requests based on temporary situations, systems needed to accept and track customer contacts, requests for provisioning of additional resources where it has been identified that current levels will impact on timely contact handling. These processes are responsible for implementing generic and specific changes to customer interfaces. This support includes localization support and personalization support, and it could be in updating agent scripts, IVR announcements, Web pages, etc. Customer Interface Support processes keep up to date all information concerning customers **AM**

Salesforce Conformance Description

Salesforce provides key tools that ensure Customer Interaction processes can operate efficiently – such as Salesforce Knowledge, Platform capabilities for Localization and Personalization, and Visual Flow.
Please refer to [REF1.3.1- 10], [REF1.3.1- 11], [REF1.3.1- 12] and [REF1.3.1- 13] for additional details on these features.

Salesforce provides multiple tools to handle requests based on temporary unplanned incidents (such as unexpected demands for services when there is a major outage). CSP can proactively contact affected customers before customers contact them, either through email directly from Service Cloud, or from Marketing cloud (in case of large volume).

In case of an outage, all contacts related to the outage topic (say handset malfunction) can be easily routed to a high priority queue managed by certain agents who are skilled to address the situation. Omni-Channel can be easily configured, as explained in [REF1.3.1- 15].

1.2   1.3.1.3 Support Problem Handling

1.2.1   1.3.1.3.8 Track Problem Handling Process Capability

LEVEL 4 PROCESS MAPPING DETAILS
1.3.1.3.8 Track Problem Handling Process Capability

Brief Description

Tracking and monitoring of the Problem Handling processes and associated costs (including where customer infrastructure is deployed and managed by third parties), and reporting on the capability of the Problem Handling processes **AM**

Extended description

Not used for this description.

Salesforce Conformance Description

We understand that this process relies on leveraging OSS information (such as service uptimes) which can be used to track and monitor the overall problem handling process within a CSP's enterprise. The solution rests on 3 pillars -Case Management, Salesforce Reports and Sourcing information from 3rd party OSS systems.

Please refer to [REF1.3.1- 02], [REF1.3.1- 03], [REF1.3.1- 04], [REF1.3.1- 05], [REF1.3.1- 06], [REF1.3.1- 16] and [REF1.3.1- 17] for additional details.

1.2.2   1.3.1.3.9 Manage Problem Handling Notification

LEVEL 4 PROCESS MAPPING DETAILS
1.3.1.3.9 Manage Problem Handling Notification

Brief Description

Establishing and managing customer problem notification facilities and lists to support the Problem Handling notification and reporting processes **AM**

Extended description

Not used for this description.

Salesforce Conformance Description

It is important for a CSP to capture customer preferences on when/how to engage with customer, and keep them current as well. Administrator and Solution Designers deploying Salesforce for a CSP should configure the notification framework which will be used to communicate/notify customers.

This would include the following tasks (but not limited to):

1. Setup of Service Cloud Console

2. Establish workflow and workflow actions to send Email Notification after an event

3. Send an email directly from Case Feed

4. Add customers as Members to community

5. Configure Salesforce Reports and Dashboards to track customer interaction

Please refer to [REF1.3.1- 07], [REF1.3.1- 08], [REF1.3.1- 09] and [REF1.3.1- 17] for additional details. Additional diagrams were submitted as a part of the detailed submission.

1.2.3   1.3.1.3.10 Undertake Problem Handling Trend Analysis

LEVEL 4 PROCESS MAPPING DETAILS
1.3.1.3.10 Undertake Problem Handling Trend Analysis
Brief Description
These processes undertake trend analysis on problem handling **AM**
Extended description
Not used for this description.
Salesforce Conformance Description
Salesforce provides capabilities to run trend analysis on Case object (which is the main entity for problem handling)[1]. Historical trend reporting uses a special custom report type designed to highlight changes between five snapshot dates, such as five business days or five business weeks. This data can be visually represented in charts and on dashboards.
[REF1.3.1- 01] provides details on how to set up historical trend reports.
Backlog Analysis from Wave for Service help Service Managers better understand their trouble spots and staffing needs (as explained in [REF1.3.1- 14]

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[1] Trend Analysis can also be done for Opportunities, Forecasting Items, and up to 3 custom objects

2   Salesforce Products

Salesforce products referenced in this Document:

1. Salesforce Service Cloud
2. Salesforce Analytics Cloud

3   Supporting Evidence References (Works Cited)

[REF1.3.1- 01]	Documentation: Set Up Historical Trend Reporting
[REF1.3.1- 02]	Documentation: Using Multiple Business Processes
[REF1.3.1- 03]	Documentation: Record Type
[REF1.3.1- 04]	Implementation Guide - Case Management
[REF1.3.1- 05]	Documentation: Fields available for Case Reports
[REF1.3.1- 06]	Developer Documentation: Chatter REST API (Follow a Record)
[REF1.3.1- 07]	Documentation: Create Custom HTML Email Templates
[REF1.3.1- 08]	Winter '17 Release Document: Getting Started with Communities
[REF1.3.1- 09]	Implementation Guide: Salesforce Console
[REF1.3.1- 10]	Implementation Guide: Salesforce Knowledge
[REF1.3.1- 11]	Documentation: Using Suggested Articles to Solve Cases
[REF1.3.1- 12]	Documentation: Select your language, locale and currency
[REF1.3.1- 13]	Implementation Guide: Visual workflow
[REF1.3.1- 14]	Guide: Wave App for Service
[REF1.3.1- 15]	Administrator Guide – Omni Channel for Administrators
[REF1.3.1- 16]	Help Documentation – Salesforce Connect
[REF1.3.1- 17]	Salesforce Developers Blog: Salesforce Connect Reporting