Frameworx 16.0 Solution Conformance

Salesforce solution for omni-channel service in Communications

Self-Assessment Process Mapping Report

Customer Interaction Management (1.3.5)

Version 1.0

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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 1.3.5.1 Create Customer Interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.1 Create Customer Interaction
Brief Description Create a record that logs the customer interaction. **AM** **Extended description** The purpose of this process is to create a record that logs the customer interaction. The customer interaction can be initiated by the customer or by the enterprise. **AM** **Salesforce Conformance Description** Salesforce provides several features that allow a Communications Service Provider to record customer interactions originating in multiple channels. A customer can contact a CSP through any channel to create a new case or follow up on an existing one. Salesforce provides two ways of creating and managing tasks that need to be completed to manage an interaction. The first option is through the use of Case Feed. Additional details can be obtained from [REF 1.3.5 - 24] and [REF 1.3.5 – 22] An agent can also use Interaction Log (available in Console) to write notes on records that appear on primary tabs of console. [REF 1.3.5 - 13] and [REF 1.3.5 – 14] explain how to set up interaction logs in a Service Cloud Console. Additional figures were provided as a part of the detailed submission to TMF.

1.2 1.3.5.2 Update Customer Interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.2 Update Customer Interaction
Brief Description Update the customer interaction. **AM** **Extended description** The purpose of this process is to update the customer interaction, typically when additional action is carried out during long-lived interactions. When the customer should be notified about the update, this process triggers the Notify Customer process to perform the notification. **AM** **Salesforce Conformance Description** Customer interactions can be updated as the interaction proceeds by adding new Activity records to the Activity History list. As discussed in our response to Creation of Customer Interaction (1.3.5.1), addition of new Activity records can be done in an automated or manual manner. A user can also edit an existing task (change status, due date). When a notification needs to be sent to a Customer (at the completion of a task/change in status), Notify Customer process can be executed through the following mechanisms: Automated Email through workflow tools, through the use of triggers, notifications in customer community. Please refer to [REF 1.3.5 – 08], [REF 1.3.5 – 09], [REF 1.3.5 – 23] for additional details.

1.3 1.3.5.3 Close Customer Interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.3 Close Customer Interaction
Brief Description Close the customer interaction. A**M** **Extended description** The purpose of this process is to close the customer interaction when both parties agree that the interaction is closed. A**M** **Salesforce Conformance Description** As discussed in our response to 1.3.5.1, an agent can adopt two ways of creating and managing interactions related to a case - Case Feed or as Activity History (maintained as a related list to Case object). Please refer to [REF 1.3.5 – 24] for additional details.

1.4 1.3.5.4 Log Customer Interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.4 Log Customer Interaction
Brief Description Record and maintain all information about the customer interaction. **AM** **Extended description** The purpose of this process is to record and maintain all information about the customer interaction. This information can be used in future interaction or as input for data analysis processes. **AM** **Salesforce Conformance Description** As discussed in our response to 1.3.5.1, Salesforce provides two main ways of recording and maintaining customer interactions – Case Feed and Interaction Log. Please refer to [REF 1.3.5 – 10] and [REF 1.3.5 -25] for additional details.

1.5 1.3.5.5 Notify Customer

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.5 Notify Customer
Brief Description Notify the customer when interesting events happen. **AM** **Extended description** The purpose of this process is to notify the customer when events related to existing interactions or to significant customer experience happen. Some notifications can be sent immediately using interactive media (such as SMS, Push to applications, etc.) and other notifications can be sent later using asynchronous media such as mail. **AM** **Salesforce Conformance Description** Salesforce recommends Communications Service Providers (CSP) to regard Notification Requirements through a broader lens of Customer Engagement. Notifications should be viewed as a *Two Way Street.* It is important for a CSP to capture customer preferences on when/how to engage with customer, and keep them current as well. We have seen the following common (but not limited to) scenarios when a CSP would like to notify their customers: ● Status Changes on Case ● Service Outage ● Notification of new invoice ● Notification for special events such as thresholds limits exceeded, payment received/rejected, Credit Card expires/about to expire ● Mass Notifications on campaigns Salesforce Platform provides CSPs multiple options to build a Notification Framework, and a CSP uses combinations of these options depending on use cases: Standard Email Notification, Notifications in Customer Community, Salesforce LiveMessage, Custom APEX program to send notifications. CSP can also leverage Heroku and Notification capabilities of Marketing Cloud for sending mass communications. Additional figures were provided as a part of the detailed submission.

1.6 1.3.5.6 Track and Manage Customer Interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.6 Track and Manage Customer Interaction
Brief Description Ensure that Customer Interactions are managed and tracked efficiently. **AM** **Extended description** The purpose of this process is to ensure that Customer Interactions are managed and tracked efficiently across all interaction channels in order to meet the agreed SLA with the customer. Responsibilities of these process include but are not limited to: • Ensure interactions are completed and closed in a timely manner • Notify the customer when SLA or deadlines cannot be met • Track customer responses when these are required • Measure KPIs in order to improve the Interactions efficiency. **AM** **Salesforce Conformance Description** Service Cloud can help a CSP manage interactions across multiple channels as well as manage and track the process flows for problem resolution (through case management procedures). Since the information is captured in the same underlying platform, information can be shared across channels easily and efficiently to all users (support agents, CSP customers), resulting in reduced resolution times and higher customer satisfaction levels. Tasks and interactions can be tracked independently in Salesforce, and can be related to any entity - Account, Object, Lead or even a custom object. However, when it comes to customer engagement, they are typically associated with a case (as explained in our response to 1.3.5.1). A CSP can manage interactions with customers using the following capabilities from Salesforce: Milestones and Entitlement Management Process, Escalation Management Process and Workflow Action and Milestone Actions. Please refer to [REF 1.3.5 – 19], [REF 1.3.5 – 20] & [REF 1.3.5 – 21].: **Track customer responses** Customers can connect with a CSP through multiple channels - Digital Channels or in-person (walk in store, field service technician etc.). Responses through digital channel can be automatically included in the Activity History or Case Feed. Activity History for case keeps track of all emails that are sent/received for resolution of a case. Knowledge Article [REF 1.3.5 - 16] explains some crucial steps that a CSP needs to follow to ensure that an incoming email gets added to a case.

CSPs integrate their call centers (such as Avaya, Genesys) with Salesforce with the help of a CTI adapter (either from the CTI vendor or a third party). Most CTI adapters integrated with Salesforce, provide the functionality (with the help CTI toolkit from Salesforce [REF 1.3.5 - 18]) to automatically log every incoming call as a “Call” within the Activity history.

Measure KPIs in order to improve the Interactions efficiency:

Service Cloud comes with standard reports out of the box to manage omni-channel support; a Salesforce user (with the right permissions) can customize existing reports or create new ones). Reports also function as the source for dashboard components, which visually display data in dashboards, which are also shared via folders.

Communications Service Providers using Service Cloud use the platform to measure and track the following (but not limited to) metrics (related to efficiency) through reports that can be generated from data captured in Salesforce:

1. First Call Resolution Rate
2. Case Resolution Time
3. Customer Satisfaction
4. Milestone violation
5. Cases Escalated.

[REF 1.3.5 - 15] provides resources on how a user can create new reports on Salesforce.

1.7 1.3.5.7 Report Customer interaction

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.7 Report Customer interaction
Brief Description Monitor the status of a customer interaction. AM **Extended Description** The purpose of this process is to monitor the status of a customer interaction, provide notifications of any changes and provide management report. These processes record, analyze and assess the customer interaction status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Customer Interaction Management process. These specialized summaries could be specific reports required by specific customers. AM **Salesforce Conformance Description** The Salesforce platform is designed to act as the customer relationship master and will retain a full history of interactions with a customer across any channel. In situations where the real-time interaction is managed by the platform itself, the history is automatically captured. For example, if a telephone call from a customer is routed via CTI (computer-telephony-integration) to an agent, or that same agent is discussing a service case with a customer via a live web chat, an interaction log is automatically created by Salesforce. For other situations, manual logs can be added by the user or the Salesforce API can be used to allow external channel applications to push a record of the interaction into the Salesforce platform. Salesforce provides a number of tools to enable notifications to be generated: Chatter Feed, workflow, streaming API, Entitlements. Salesforce provides a number of pre-built reports and also makes available packages of reports and dashboards on the AppExchange. The latter can be installed by customers and then subsequently tailored to meet their unique needs. [REF 1.3.5 - 12] is a link to a sample set of free dashboards available from the AppExchange.

1.8 1.3.5.8 Authenticate User

LEVEL 3 PROCESS MAPPING DETAILS 1.3.5.8 Authenticate User
Brief Description Authenticate the person involved in the interaction. AM **Extended Description** The purpose of this process is to authenticate the person involved in the interaction from the customer side. In self-service channels the user may need to login in order to authenticate himself, in other channels the user my need to answer identity verification questions. AM **Salesforce Conformance Description** When a customer is attempting to gain direct access to a system (such as a self-service channel), Salesforce Identity will enforce the collection of authentication information such as username & password, and may optionally require a second authentication factor. Alternatively, Salesforce can delegate authentication to a 3rd party identity provider. When a customer is speaking to an employee who needs to verify the customer's identity, Salesforce visual workflows can be used to guide the employee through a series of confirmation steps. Workflows can read information from the customer profile and use this to present a series of questions for the customer to answer [REF 1.3.5 - 11] provides details on how Salesforce Visual Workflow can be implemented.

1.9 1.3.5.9 Customer Interface Management

1.9.1 1.3.5.9.1 Manage Request (including Self Request)

LEVEL 4 PROCESS MAPPING DETAILS 1.3.5.9.1 Manage Request (including Self Request)
Brief Description Manage all requests (inbound and outbound) made by potential and existing customers **AM** **Extended Description** The purpose of this process is to manage all requests (inbound and outbound) made by potential and existing customers. It receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request; it manages the status of the request and is able to provide status information at any moment in which the request is active; it formally closes the request when all related activities have been terminated. **AM** **Salesforce Conformance Description** All requests made by potential and existing customers are handled through Salesforce Service Cloud, which enables organizations to provide world-class customer service across every channel. With Service Cloud, prospects or customers can choose how they communicate with Service Agents, whether it's by web, chat, email, phone, or social media [REF 1.3.5 - 01]. Customer requests are generally managed through a Case, which is a description of a customer's problem, question or feedback. Cases are the objects used to track and solve customers' issues [REF 1.3.5 - 02]. Customer requests and Cases can be created and managed in various ways using Customer Community, Web-2-Case, Email-2-Case and programmatically. Please refer to [REF 1.3.5 -02], [REF 1.3.5 – 30], [REF 1.3.5 – 31], [[REF 1.3.5 – 32], [REF 1.3.5 – 33], [REF 1.3.5 – 34] and [REF 1.3.5 – 03] for additional details. Incoming Cases can be automatically routed and assigned to one person, groups of people, or even queues leveraging the Salesforce Omni-Channel capability. With *Salesforce Omni-Channel*, a CSP can set the priority of work items to make sure that critical assignments get taken care of quickly. CSP's Service Manager can manage agents' capacity and availability for work to ensure that they're given only the number of assignments that they can handle, define which agents can work on different types of Best of all, agents no longer have to pick

and choose work items manually from a queue, and managers no longer have to triage or dispatch work to agents. Work is served to the most qualified available agent in real time. See [REF 1.3.5 - 29] for more details.

As the case progresses through different stages, customer can be kept informed in several ways (based on Service Provider policies, business practices and/or customer preferences). Customers can check status of the case autonomously through the Case Feed, within Customer Community, or can receive notifications via email, SMS, push on mobile apps when the status changes: notifications can be implemented leveraging the Salesforce automation capabilities like Lightning Process Builder [REF 1.3.5 - 35]. More generally, it is possible to query the Case at any time and manage its status through the Case API's.

When all the activities related to Case are completed and the Customer is satisfied with answers received, the Case can be closed by Customer, using a self-service tool like Communities, or Service Agent. Additionally, the Case closure can be automated using Process Builder, based on specific conditions defined by Service Provider.

1.9.2 1.3.5.9.2 Analyze & Report on Customer

LEVEL 4 PROCESS MAPPING DETAILS 1.3.5.9.2 Analyze & Report on Customer
Brief Description Perform all necessary analysis on closed requests and on customer contacts and generate related reports **AM** **Extended Description** The purpose of this process is to perform all necessary analysis on closed (completed or unfulfilled) requests and on customer contacts and it generates related reports, to be utilized for process improvement activities, proactive problems prevention, up-sell opportunities definition, etc. **AM** **Salesforce Conformance Description** Salesforce includes a reporting engine, designed to allow users to easily create the reports they need. Users create reports using a step-by-step wizard, can schedule when they run, who they're sent to, and can even export report results to Excel if desired. CSP can also use other reports that are related to Average Handle Time, Open Cases by Priority, etc. A dashboard is a visual display of key metrics and trends for records in your Salesforce organization. Predefined Dashboards are designed for Service Executives and for Agents as well. There're sample Service Cloud reports and dashboards included with Salesforce, that can be used as-is or customized for specific needs. See [REF 1.3.5 - 04] for a description of available reports and dashboards. Additionally, pre-built reports and dashboard for Service are also available on Salesforce AppExchange from Salesforce Labs (for free) [REF 1.3.5 - 05]. Additional diagrams were provided as a part of detailed submission. In addition to standard reports available on Service Cloud, a CSP can also use Wave for Service (built on Wave Analytics) which provides pre-packaged dashboards (populated with Service Cloud data), delivering a complete view of critical KPIs for service managers and agents directly to any device. Service leaders get instant insight into net promoter scores, case volume, team performance and trends across all channels. Every service agent gets a 360-degree customer view and deeper

understanding of case context, so they can deliver the right service on the right channel at the right time.

1.9.3 1.3.5.9.3 Mediate & Orchestrate Customer Interactions

LEVEL 4 PROCESS MAPPING DETAILS 1.3.5.9.3 Mediate & Orchestrate Customer Interactions
Brief Description Ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers **A** **Extended Description** The purpose of the Mediate & Orchestrate Customer Interactions is to ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers. Increasingly transactions with external parties (e.g. customers using RosettaNet or Web Services standards) will need to conform to message and data formats defined by third parties or third party organizations. Based on the specific transaction type and involved external party, this conformance will require the identification of the necessary data formats to be sent externally, and conversion of externally received messages into the required internal enterprise formats. In addition, interactions with external parties may require that messages and transactions need to be undertaken with defined and agreed orchestration for message exchange. The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s. **A** **Salesforce Conformance Description** Salesforce platform provides the ability to interact with third parties using various standard API's: ● REST, to implement synchronous calls, exchanging either XML or JSON formats ● SOAP, to implement synchronous calls, exchanging XML formats Both, REST and SOAP API's are configured out of the box to suit the basic CRUD (create, read, update and delete) operations of data management on Salesforce Objects. When it comes to SOAP, Salesforce provides two SOAP API WSDLs for two different use cases. The enterprise WSDL is optimized for a single Salesforce org. It's strongly typed, and it reflects CSP's org's specific configuration, meaning that two enterprise WSDL files generated from two different orgs contain different information. The partner WSDL is optimized for use with many Salesforce orgs. It's loosely typed, and it doesn't change based on an org's specific configuration. See [REF 1.3.5 - 28] and [REF 1.3.5 – 06] for details about SOAP/REST API. Additional figures were submitted as part of detailed submission.

Use of these API's provides the ability to define custom logic and includes automatic argument/object mapping. If needed, an orchestration logic can be implemented within Salesforce leveraging the code capabilities provided by Apex. For more details, see [REF 1.3.5 - 07]

2 Salesforce Products

Salesforce products referenced in this Document:

1. Salesforce Service Cloud
2. Salesforce Community Cloud
3. Salesforce Marketing Cloud
4. Salesforce Analytics Cloud

3 Supporting Evidence References (Works Cited)

[REF 1.3.5 - 01]	Documentation: Service Cloud
[REF 1.3.5 - 02]	Documentation: Cases
[REF 1.3.5 - 03]	Case API's
[REF 1.3.5 - 04]	Customer Service Dashboards
[REF 1.3.5 - 05]	Service & Support Dashboards
[REF 1.3.5 - 06]	Apex Overview
[REF 1.3.5 - 07]	Technical Library: Salesforce Platform API's
[REF 1.3.5 - 08]	Documentation - Workflow
[REF 1.3.5 - 09]	APEX Developer Guide - Triggers
[REF 1.3.5 - 10]	SOAP API Developer Guide - ActivityHistory
[REF 1.3.5 - 11]	Implementation Guide - Salesforce Visual Workflow
[REF 1.3.5 - 12]	AppExchange dashboards - Dashboards
[REF 1.3.5 - 13]	Documentation - Set Up Interaction Logs for a Salesforce Console
[REF 1.3.5 - 14]	Documentation - Work on Open Activities and View Activity History in Salesforce Classic
[REF 1.3.5 - 15]	Salesforce Help : Reports and Dashboards
[REF 1.3.5 - 16]	Knowledge Article: Why are Emails not being added to a case when customer responds?
[REF 1.3.5 - 17]	Documentation: Social Customer Service
[REF 1.3.5 - 18]	Developer Document - CTI Toolkit
[REF 1.3.5 - 19]	Admin Guide: Entitlement Management

[REF 1.3.5 - 20]	Implementation Guide - Case Management
[REF 1.3.5 - 21]	Release Notes: Milestone Actions
[REF 1.3.5 - 22]	Data Model: Task and Event Object
[REF 1.3.5 - 23]	Release Notes: Private Messages in Communities
[REF 1.3.5 - 24]	Documentation: Case Feed and Related Lists
[REF 1.3.5 - 25]	Documentation: Activity Reports
[REF 1.3.5 - 26]	Knowledge Article: Salesforce LiveMessage Services Trust and Compliance Documentation
[REF 1.3.5 - 27]	REST API Developer Guide: Introducing Force.com REST API
[REF 1.3.5 - 28]	REST API Developer Guide: Introducing SOAP API
[REF 1.3.5 - 29]	Omni-Channel: Administrator's guide
[REF 1.3.5 - 30]	Documentation: Salesforce Communities
[REF 1.3.5 - 31]	Documentation: Knowledge Base
[REF 1.3.5 - 32]	Documentation: Community Case Feed
[REF 1.3.5 - 33]	Knowledge Article: Web to Case
[REF 1.3.5 - 34]	Documentation: Email to Case
[REF 1.3.5 - 35]	Documentation: Process Builder