

Framework 16.0 Solution Conformance

Salesforce solution for omni-channel service in Communications

Self-Assessment Process Mapping Report

Problem Handling (1.3.7)

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 1.3.7 Problem Handling

1.1 1.3.7.1 Isolate Customer Problem

1.1.1 1.3.7.1.1 Verify Product Configuration

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.1.1 Verify Product Configuration

Brief Description

This process verifies whether the customer is using the purchased product offering correctly. **AM**

Extended description

Not used for this process element.

Mandatory

Verifies whether the customer is using the purchased product offering correctly. **AM**

Salesforce Conformance Description

During the handling of a customer interaction, there are various techniques on the Salesforce platform that can be used to assist the agent in diagnosing the problem and bringing it to resolution –leveraging process flows as scripted guides together with technical integrations and UI mashups.

Providing performance information to agents is vital as a part of diagnosis and problem resolution - which often entails mass amounts of data from network monitors/sensors. Salesforce Thunder is a platform for managing the data feed coming from a connected product such as remote sensors from customer equipment. This is an excellent use case for proactive assurance (i.e. system detects the issue even before the customer calls in) - which is very well suited for an ingestion and CEP engine like Thunder.

1.1.2 1.3.7.1.2 Perform Specific Customer Problem Diagnostics

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.1.2 Perform Specific Customer Problem Diagnostics
Brief Description <p>This process performs diagnostics based on the customer provided information to determine whether the root cause of the customer problem is linked to the underlying services. AM</p>
Extended description <p>Not used for this process element.</p>
Mandatory <p>Performs diagnostics based on the customer provided information to determine whether the root cause of the customer problem is linked to the underlying services. AM</p>
Salesforce Conformance Description <p>With reference to 1.3.7.1.1 above, service agents can be guided through a call resolution script to gather information and provide additional steps dependent upon the answer i.e. using branching logic to identify the root cause. The gathering of information may come from asking the customer a question and recording the response, or calling out to an external application. [REF1.3.7 - 01] Starting at page 25 is a detailed description of how to build a visual flow, including screenshots of the design tools.</p>

1.1.3 1.3.7.1.3 Perform Specific Customer Problem Tests

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.1.3 Perform Specific Customer Problem Tests

Brief Description

This process performs diagnostics based on the customer provided information to determine whether the root cause of the customer problem is linked to the underlying services. **AM**

Extended description

Not used for this process element.

Mandatory

Runs tests against the specific services. **AM**

Salesforce Conformance Description

As for 1.3.7.1.2 above, visual workflow would be used to build the diagnostic process, which might include callouts to external systems to test a specific system. The flow logic would be branched depending on the result received from the test. Salesforce provides a variety of integration methods to support the callout to external systems. The most commonly used methods are Web Services, OData, and UI Mashup.

1.1.4 1.3.7.1.4 Notify T&M Root Cause Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.1.4 Notify T&M Root Cause Customer Problem	
Brief Description	This process notifies the Track & Manage Customer Problem processes when the analysis is complete. AM
Extended description	Not used for this process element.
Mandatory	Notifies the Track & Manage Customer Problem processes when the analysis is complete. AM
Salesforce Conformance Description	<p>The “Track and Manage Customer Problem” processes are centered on the case object in Salesforce. Once the analysis is completed (via a visual workflow, as discussed in 1.3.7.1.2 Perform Specific Customer Problem Diagnostics), a CSP can use any of the following options to notify root cause of customer problem - Field Update, call to an APEX class or associate related object with Case.</p> <p>Additional diagrams were provided as a part of the detailed submission.</p>

1.1.5 1.3.7.1.5 Categorize Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.1.5 Categorize Customer Problem
Brief Description
To be added.
Extended description
Not used for this process element.
Explanatory
Use categorized Impact and Urgency levels to focus on the business critical problems based on the problem prioritization. This process is used to validate and classify the customer problem. Which involves filtering out problems classify them. AM
Mandatory
This process is responsible for categorizing the customer problem according to the type of the problem, impact, and standardized criteria at CRM level. Moreover, this activity will be carried out with appropriate diligence, in order to provide inputs to the "Track & Manage Customer Problem" process. Analyze customer problem, filter out irrelevant and false problems. Determine the problem severity based on its impact and set the appropriate priority. AM
Salesforce Conformance Description
The standard Salesforce case object contains picklist (constrained value) fields to categorize the priority and type of problem. Additional fields can be added easily using the schema builder to enable a case to be categorized however the operator sees fit, including impact assessment.
Based on a user's profile, the ability to set and change the categorization fields can be controlled down to individual field level to ensure that appropriate controls are in place. The assignment of category values can also be automated throughout the case management process.
Salesforce also includes an entitlement management capability that can track key milestones in the resolution of a case and ensure they are in line with the service level agreement for the product type and specific customer.
Additional diagrams were provided as a part of the detailed submission.

1.1.6 1.3.7.1.6 Identify Root Cause / Check for Workarounds

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.1.6 Identify Root Cause / Check for Workarounds
Brief Description To be added.
Extended description Not used for this process element.
Explanatory Investigate the customer problem cause and check for workarounds or temporary fix. AM
Mandatory Verify the configuration of the customer's product. Look for the root cause of the customer problem. If the cause is determined, recommend a workaround or a temporary fix for the problem. AM
Salesforce Conformance Description <p>Salesforce can store (or access in an external system by integration) the customer's install base (configuration parameter) that was captured at point of delivery. This information can be inspected by an agent to determine any issues in configuration parameters that may cause the issue. As a part of this inspection - configuration summary pages can be produced through the use of reports specific to that customer's record. Conformance to additional root cause analysis details can be accessed in 1.3.7.1.2. Within Salesforce, the case object is used to store all information related to the customer issue and would include a summary of the root cause analysis with either free text or structured fields to contain the product type, problem type, specific problem code etc.</p> <p>Salesforce knowledge is a knowledge management system that will automatically recommend relevant articles based on the attributes of a case. Knowledge articles might include suggested work-around or temporary fixes and could include step-by-step instructions for the customer to follow. As a fully integrated component of the Salesforce application, knowledge base articles can be shared with the customer via email, web chat sessions or through the customer community (portal).</p>

Salesforce Customer Community enables the customer of a CSP to collaborate and share experiences with their peers. This includes the ability to ask a question which other community members can respond to and the original requester can then flag the best answer.

[REF1.3.7 - 02] Starting page 7 “Build your knowledge base” provides a comprehensive description of the features and setup of Salesforce knowledge.

Additional diagrams were provided as a part of the detailed submission.

1.1.7 1.3.7.1.7 Obtain permanent fix or workarounds

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.1.7 Obtain permanent fix or workarounds
Brief Description To be added.
Extended description Not used for this process element.
Explanatory To provide either a temporary fix or workaround to the problem.
Mandatory Check for permanent fixes for the customer and if not available look for possible workarounds as remedy for the problem. AM
Salesforce Conformance Description As with 1.3.7.1.6, Salesforce Knowledge base would be used to recommend articles that contain possible workarounds. Users with appropriate permissions are able to create and publish new articles to the knowledge base.

1.1.8 1.3.7.1.8 Create customer problem restoration plan

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.1.8 Create customer problem restoration plan	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	Create a plan for restoration AM
Mandatory	The primary aim is to put a plan to restore the 'normal service' to the customer as quickly as possible. That should include anything that is needed to allow the customer to return to the normal working, in order to minimize business impact. AM
Salesforce Conformance Description	Salesforce Case object is the central point to collect data relating to the customer service issue. The case management process within Salesforce entails several steps that can be deployed by a CSP to restore normal service to the customer as quickly as possible. Once a case is assigned to a user (or a queue), checks can also be built to ensure subsequent steps - such as Identify Solution, Communication of Solution, Rework/Reassign/Escalate Case (if applicable) are completed within established guidelines.

1.1.9 1.3.7.1.9 Create customer problem restoration plan

We are missing the mapping for process element '1.3.7.1.9 - Create Known record'

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.1.9 Create Known record	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	<p>When a root cause and permanent fix or workaround are identified for a customer problem. A record is created to identify the problem along with any associated root-cause, fix and workarounds.</p> <p>AM</p>
Optional	<p>An incident count that can be useful to determine the frequency with which problems are likely to recur and influence priorities. AM</p>
Salesforce Conformance Description	<p>Salesforce provides Case Object for managing customer problems and incidents. A case is created [REF1.3.7 - 42] when a new problem is reported (with status as new). Once a permanent or workaround solution is identified, Salesforce recommends updating the case record with a different status (e.g. closed), and updating other fields or related objects. CSP can also use standard case fields such as Reason [REF1.3.7 - 18] or any other custom field to capture the root-cause of the problem.</p> <p>An administrator can configure any of the two methods to display a count on the total number of cases that are open (or any criteria) either through a Dashboard or with the help of custom VisualForce component</p> <p>Please refer to [REF1.3.7 – 51], [REF1.3.7 – 19], [REF1.3.7 – 21], [REF1.3.7 – 25] for additional details.</p>

1.2 1.3.7.2 Report Customer Problem

1.2.1 1.3.7.2.1 Monitor Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.2.1 Monitor Customer Problem	
Brief Description	This process is responsible for continuously monitoring the status of customer problem reports. AM
Extended description	Not used for this process element.
Mandatory	Continuously monitors the status of customer problem reports. AM
Salesforce Conformance Description	<p>Case is the core business entity maintained in Salesforce to track customer issues and questions, and Case status field acts as a key tracking field for tracking and monitoring cases in real time.</p> <p>A CSP can monitor the customer a case record in the following ways: Workflow Rules, Escalation Rules, collaboration tool on Case record and Salesforce Reports.</p> <p>Please refer to [REF1.3.7 – 24], [REF1.3.7 – 48] for additional details.</p>

1.2.2 1.3.7.2.2 Distribute Customer Problem Notifications

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.2.2 Distribute Customer Problem Notifications
Brief Description <p>This process makes the necessary reports about the problem that occurred, the root cause and the activities carried out for recovery of normal operation. AM</p>
Extended description <p>Not used for this process element.</p>
Mandatory <p>Makes the necessary reports about the problem that occurred, the root cause and the activities carried out for recovery of normal operation. AM</p>
Salesforce Conformance Description <p>Case is the core business entity maintained in Salesforce to track customer issues and questions. Salesforce captures all transactions including a significant amount of data and detail in a case record. Details of customer problem can be entered in standard field of Case object (such as Reason, as mentioned in list of Case standard fields in [REF1.3.7 - 18]) or as data in a custom object by itself.</p> <p>Salesforce provides two ways of recording tasks that are carried out to for resolution – through the use of Case Feed and Interaction Log. Please refer to [REF1.3.7 -19], [REF1.3.7 -20], [REF1.3.7 -21] for additional details.</p> <p>Additional diagrams were provided as a part of the detailed submission.</p>

1.2.3 1.3.7.2.3 Distribute Customer Problem Management Reports & Summaries

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.2.3 Distribute Customer Problem Management Reports & Summaries

Brief Description

This process records, analyzes and assesses the Customer Problem Management status changes to provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Customer Problem Management process. These specialized summaries could be specific reports required by specific audiences. AM

Extended description

Not used for this process element.

Salesforce Conformance Description

CSP Managers have all the tools they need to identify service trends and more proactively adapt service processes with Salesforce Reports & Dashboards. Salesforce Reports & Dashboards is a real-time, robust reporting and analytics engine that enables deep analysis of all Salesforce data. A list of standard reports and their purpose can be obtained from [REF1.3.7 - 44].

[REF1.3.7 - 22] provides resources on how a user can create new reports on Salesforce.

Call center managers get a single, real-time view of the key service metrics with standard reports and dashboards feature, which includes measurements of response times (per channel), first-contact resolution rates, and more. CSP's Call center managers using Service Cloud use the Salesforce 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: My Calls Today, My Calls This Week and My Team's Calls This Week.

Salesforce Dashboards are built on reports and give you the ability to create dashboards based on the date that's visible with the reports. Salesforce offers customers a predefined set of service dashboards that can be downloaded for free via AppExchange [REF1.3.7 - 45].

Additional diagrams were provided as a part of the detailed submission.

1.2.4 1.3.7.2.4 Notify Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.2.4 Notify Customer Problem

Brief Description

This process is responsible for managing notifications to processes and other parties registered to receive notifications of any status changes on customer problem reports. Notification lists are managed and maintained by the Support Problem Handling processes. AM

Extended description

Not used for this process element.

Mandatory

Manages notifications to processes and other parties registered to receive notifications of any status changes on customer problem reports. Notification lists are managed and maintained by the Support Problem Handling processes. AM

Interactions

Managing notifications to processes and other parties registered to receive notifications of any status changes. AM

Salesforce Conformance Description

CSPs normally capture and store customer notification preferences in Contact object (as explained in our conformance response to L4 Process: 1.3.1.3.9 Manage Problem Handling Notification, Customer Support and Readiness (1.3.1). If a CSP chooses to use Marketing List for sending mass notifications, Audience Builder App from Marketing Cloud can be used to prepare notification lists for different segments [REF1.3.7 - 46].

Salesforce Platform provides CSPs multiple options to build a Notification Framework to send notifications to parties registered to receive notifications:

1. Standard Email Notification
2. Notifications in Customer Community
3. Salesforce LiveMessage
4. Custom APEX program to send notifications
5. CSP can also use Heroku to send mass notifications

6. CSP can also leverage Notification capabilities of Marketing Cloud to send mass notifications (Email/SMS)

We have explained how each of these methods can be executed in our conformance report for Customer Interaction Management 1.3.5 (Section 1.5 Process 1.3.5.5 Notify Customer).

1.2.5 1.3.7.2.5 Issue Customer Problem Management Summaries

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.2.5 Issue Customer Problem Management Summaries
Brief Description <p>This process issues specialized summaries of the efficiency and effectiveness of the overall Customer Problem resolution process. These specialized summaries could be specific reports required by specific audiences. AM</p>
Extended description <p>Not used for this process element.</p>
Mandatory <p>Issue specialized summaries of the efficiency and effectiveness of the overall S/P problem resolution process. These specialized summaries could be specific reports required by specific audiences. AM</p>
Salesforce Conformance Description <p>Salesforce helps ensure that valuable data gathered from customer interactions result in continuous improvements in the quality of products and services offered by a CSP. As explained in our response to 1.3.7.2.3 (Distribute Customer Problem Management Reports & Summaries), customer service managers can use Salesforce Reports and Dashboards to identify common issues and capture product defect data, enhancement requests, and other insights in order to provide valuable feedback to your product teams and management about how to improve your business (see Figure 06). Also as discussed in our conformance mapping for 1.3.1.3.10 (Undertake Problem Handling Trend Analysis), trend analysis can be enabled for Case. Finally, Wave Analytics can be used for massive volumes of snapshots across cases, their activities, interactions, and related data to provide deep analysis of process efficiency.</p> <p>As the reporting and dashboarding engine is part of our platform this functionality could be easily extended to supplier or partners. If a CSP partner has their own Salesforce instance, Salesforce to Salesforce connection can be used to create data sharing relationships [REF1.3.7 - 47].</p> <p>Additional diagrams were provided as a part of the detailed submission.</p>

1.2.6 1.3.7.2.6 Generate Customer Problem Management Reports

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.2.6 Generate Customer Problem Management Reports	
Brief Description	<p>This process generates Customer Problem management reports that provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Customer Problem Management process. These specialized summaries could be specific reports required by specific audiences. AM</p>
Extended description	<p>Not used for this process element.</p>
Mandatory	<p>This process generates Customer Problem management reports that provide management reports and any specialized summaries of the efficiency and effectiveness of the overall Customer Problem Management process. These specialized summaries could be specific reports required by specific audiences. AM</p>
Salesforce Conformance Description	<p>Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. Salesforce Reports and Dashboards provide insights on key metrics that can be used to track and monitor efficiency and effectiveness of overall case management process.</p> <p>[REF1.3.7 - 23] provides additional details on how a standard Salesforce report can be customized.</p> <p>Salesforce Support Reports can be used to track number of metrics to track effectiveness and efficiency of a call center in the following categories (but not limited to): Customer Information, KPI's, Rep/Agent Performance.</p> <p>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.</p>

1.3 1.3.7.3 Track & Manage Customer Problem

1.3.1 1.3.7.3.1 Coordinate Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.3.1 Coordinate Customer Problem

Brief Description

This process coordinates all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence. It schedules, assigns and coordinates any recovery activities, and any repair and restoration activities delegated to other processes. It undertakes necessary tracking of the execution progress, modifies information in an existing Customer Problem Report based on assignments, and modifies the Customer Problem Report status. AM

Extended description

Not used for this process element.

Mandatory

Coordinates all the actions necessary in order to guarantee that all tasks are finished at the appropriate time and in the appropriate sequence. It schedules, assigns and coordinates any recovery activities, and any repair and restoration activities delegated to other processes. It undertakes necessary tracking of the execution progress, modifies information in an existing Customer Problem Report based on assignments, and modifies the Customer Problem Report status. AM

Salesforce Conformance Description

The track and manage customer problem processes are centered on the case object in Salesforce. A CSP can coordinate all necessary actions with a combination of tools available on Service Cloud platform - process builder [REF1.3.7 - 06], workflows [REF1.3.7 - 13], validations [REF1.3.7 - 14] and Apex class [REF1.3.7 - 15] - scheduling activities and assigning them to specific support team. Process flows can be setup to modify cases and update statuses based on specific events. Field updates and specific events - either resulting from a manual action or from an automated action - can automatically trigger other actions A CSP can set up Escalation Rules in Service Cloud, in order to guarantee that all tasks are finished at the appropriate time.

Please refer to [REF 1.3.7 -24] and [REF 1.3.7 – 16] for additional details.

1.3.2 1.3.7.3.2 Cancel Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS

1.3.7.3.2 Cancel Customer Problem

Brief Description

This process cancels a Customer Problem Report when the specific trouble was related to an incorrect customer problem report. AM

Extended description

Not used for this process element.

Mandatory

Cancels a Customer Problem Report when the specific trouble was related to an incorrect customer problem report. AM

Salesforce Conformance Description

A customer problem can be uniquely identified with case object fields - standard (type, subtypes, description) or any custom field. These fields get created through process 1.3.7.5. Validity of a customer problem can be verified by examining these fields. A CSP can also choose to close such cases citing the appropriate reason code (as duplicate, incorrect creation). Case Closure procedure is explained in [REF1.3.7 - 25].

1.3.3 1.3.7.3.3 Escalate/End Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.3.3 Escalate/End Customer Problem
Brief Description Initiate escalation of customer problem reports as necessary. AM
Extended description Not used for this process element.
Mandatory Ensure that escalation is being invoked as required for any open customer problem reports in jeopardy AM
Salesforce Conformance Description Escalation of a case can be initiated manually by an operator or through an automatic process based on specific conditions referring to statuses or entitlements. As explained in our response in 1.3.7.3.1, a CSP can set up Escalation Rules in Service Cloud, in order to guarantee that all tasks are finished at the appropriate time. Escalation rule specifies what recovery actions need to be taken when cases are not resolved within a designated length of time such as reassigning of the case to a different user (or queue), notification to different people about the escalation. The escalation process can be supported with the use of the Entitlement object. Entitlement information can be used to trigger specific actions and escalate to different tiers of support; more detailed information on Entitlement at [REF1.3.7 - 17]. Additional diagrams were provided as a part of the detailed submission.

1.3.4 1.3.7.3.4 Monitor Customer Problem Jeopardy Status

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.3.4 Monitor Customer Problem Jeopardy Status
Brief Description Monitoring the jeopardy status of open customer problem reports. A
Extended description Not used for this process element.
Mandatory Ensure that any open customer problem reports in jeopardy are identified and reported. A
Salesforce Conformance Description As in process 1.3.7.3.3, Entitlements information can be used to trigger specific actions and define escalation processes to different tiers of support. Entitlements are associated with standard support processes composed of specific steps, often time dependent; each of these time-dependent steps is represented with a dedicated object called Milestone. More detailed information on Milestones at [REF1.3.7 - 33]. Additional diagrams were provided as a part of the detailed submission.

1.3.5 1.3.7.3.5 Prioritize Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.3.5 Prioritize Customer Problem	
Brief Description	To be added.
Explanatory	<p>This process is responsible for assigning the prioritization to customer problem in order to establish an order for handling it. Associate Impact and Urgency levels to a problem; to enable focusing on the business critical problems based on the problem prioritization. AM</p>
Mandatory	<p>The prioritization is assigned (usually automatically) according to criteria, such as, categorization, customers affected and SLAs. Record and prioritize the Problem with appropriate diligence, in order to facilitate a swift and effective resolution and avoid ambiguities. AM</p>
Salesforce Conformance Description	<p>A CSP can prioritize incoming cases in an automated fashion with the help of assignment rules (that are established during system setup). Assignment rules (as explained in [REF1.3.7 - 26]) contain entries and formulas that define the conditions it must meet for prioritization or assignment. Based on the values in these standard fields, case can be assigned to a specific agent or queue.</p> <p>Service Cloud’s Omni-Channel capability is a comprehensive customer service solution that lets a call center route any type of incoming work item (e.g. cases, chats) to the most qualified, available agents in the organization. Omni-Channel supports prioritization of cases based on different parameters (which are set during routing configuration). As explained in [REF1.3.7 - 49], a CSP can set the routing priority for high severity cases to 1 and the priority for less critical cases to 2, high severity cases are routed and assigned to agents before less critical ones.</p> <p>More details on how an Entitlement Process is used can be found at [REF1.3.7 - 34]. Additional diagrams were provided as a part of the detailed submission.</p>

1.3.6 1.3.7.3.6 Escalate Customer Problem to support team

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.3.6 Escalate Customer Problem to support team	
Brief Description	To be added.
Explanatory	<p>This process provides the escalations between support levels and actors when a customer problem cannot be solved by the current assigned group. Therefore, the escalation can be carried out between supports levels at CRM level, or, it can be escalated to others actors, such as, service provider or third-parties. It is essential the ability to rapidly escalate customer problems according to clear and agreed rules. The support of a higher level specialist is needed to resolve the problem.</p> <p>AM</p>
Mandatory	<p>Escalate the customer problem, to involve the appropriate support team, with all related customer and problem information to a higher level support. AM</p>
Salesforce Conformance Description	<p>A CSP can automate the process for escalating cases that remain open beyond a specified period of time by creating an escalation rule that specifies what actions to take when cases are not resolved within a designated length of time or the complexity of the case requires the intervention of different departments or third party actors. Detailed process of escalation rules setup is explained in Chapter Setting Case Escalation Rules in [REF1.3.7 - 24]and [REF1.3.7 – 27]</p> <p>A CSP can also assign cases to third party users who are members of a Partner Community and have access to the Account and Case information; and from a Partner Community a case handled by third party partners can be escalated to a CSP queue.</p>

1.4 1.3.7.4 Close Customer Problem Report

1.4.1 1.3.7.4.1 Contact Customer for Feedback

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.4.1 Contact Customer for Feedback
Brief Description <p>This process is responsible for contacting the customer to inquire about the customer's satisfaction with resolution of the problem. AM</p>
Extended description <p>Not used for this process element.</p>
Mandatory <p>Contacts the customer (where appropriate) to inquire about the customer's satisfaction with resolution of the problem. AM</p>
Salesforce Conformance Description <p>A CSP can use the following tools to contact a customer with an inquiry on customer satisfaction: automated process flow to start feedback process, initiate a workflow in an external system through integration and feedback forms that can be built into the Salesforce platform or can be provided by other applications.</p> <p>Please refer to [REF 1.3.7 – 28] and [REF 1.3.7 – 29] for additional details.</p>

1.4.2 1.3.7.4.2 Complete and Validate Customer Problem Report

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.4.2 Complete and Validate Customer Problem Report	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	<p>This process is used to validate the customer problem report. Which involves root-cause analysis to determine the cause of the resolved problem and also document the process that solved this problem. AM</p>
Mandatory	<p>Validate whether or not a resolution has been implemented for the customer problem. And ensure that the solution to a problem affecting the customer has been documented. AM</p>
Interactions	<p>The Complete and Validate Customer Problem Report processes will notify the Update Time to restore Service processes when the analysis is complete. Not Applicable</p>
Salesforce Conformance Description	<p>Service agents can be guided through a call resolution script to gather information and provide additional steps dependent upon the answer i.e. using branching logic to identify the root cause.</p> <p>The gathering of information may come from asking the customer a question and recording the response, or calling out to an external application. The end result of the flow will indicate if the problem is linked to the underlying services or to some other cause. Starting at page 25 [REF1.3.7 - 32] provides a detailed description of how to build a visual flow, including screenshots of the design tools.</p>

If a Customer Services Representatives cannot relate any existing article to the case, he/she can (if they have article creation permission), directly document the problem solving steps in a knowledge article and initiate the article publishing process.

This process can be executed before the Case Closure process (1.3.7.4.4 Finalize Customer Problem Report) in an automated fashion, as a prerequisite to the 1.3.7.4.4 process. As explained in our response in next session, *Update Time to Restore Service Processes* is invoked after Case Closure (1.3.7.4.4 Finalize Customer Problem Report).

Additional diagrams were provided as a part of the detailed submission.

1.4.3 1.3.7.4.3 Update Time to Restore Service

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.4.3 Update Time to Restore Service
Brief Description To be added.
Extended description Not used for this process element.
Mandatory Update the time taken to restore a configuration or Service after a failure; measured from the time the service failed until it was fully restored to its normal functionality. AM
Interactions The Update Time to restore Service process will notify the Finalize Customer Problem Report process when the update is completed. Not Applicable
Salesforce Conformance Description Service Cloud has standard fields to capture a case creation date and case closed date (which are of dateTime format). A CSP can create custom fields that can store different timestamps and formula fields to calculate the age of a case (System Date - Case Creation Date, Case Closed Date and Case Creation Date) etc. Time between start of the incident (reporting of the incident) and the resolution (Closure of the case) will be displayed as a field on the case. In addition, a CSP can enable field history tracking on Case Fields that need to tracked, as explained in [REF1.3.7 - 30]. This process gets automatically initiated upon the close of a case (1.3.7.4.4 Finalize Customer Problem Report) in an automated fashion. Hence the interaction flow (using Salesforce) is from 1.3.7.4.4 to 1.3.7.4.3.

1.4.4 1.3.7.4.4 Finalize Customer Problem Report

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.4.4 Finalize Customer Problem Report
Brief Description Ensure that a problem affecting the customer is solved. AM
Explanatory It is used to close a customer problem report when the problem affecting the customer is solved. AM
Mandatory Change the customer problem report status to cleared. AM
Salesforce Conformance Description <p>The customer problem can be marked as solved by closing the case in Salesforce. This can be done manually or automatically based on a certain other process outcome or trigger. [REF1.3.7 - 25] provides details on how an agent can close a case. Salesforce recommends saving (or initiate creation) of Knowledge Article as a part of Case Closure procedure.</p>

1.4.5 1.3.7.4.5 Communicate Service improvement Opportunity

LEVEL 4 PROCESS MAPPING DETAILS
<p>1.3.7.4.5 Communicate Service improvement Opportunity</p>
<p>Brief Description</p> <p>Identify opportunities for improvement. AM</p>
<p>Explanatory</p> <p>This process should ensure that the momentum for service improvement is qualified and assuring the communication of the applied changes, new processes, product improvement opportunity is known in the organization. AM</p>
<p>Mandatory</p> <p>Register the need for improvements in the service. AM</p>
<p>Salesforce Conformance Description</p> <p>Salesforce Service Cloud provides multiple options to identify and ensure service improvement: flagging a case, case and knowledge feed and rating of knowledge articles, and leveraging customer community. Please refer to [REF 1.3.7 – 31] and [REF 1.3.7 – 36] for additional details.</p> <p>Additional diagrams were provided as a part of the detailed submission.</p>

1.5 1.3.7.5 Create Customer Problem Report

1.5.1 1.3.7.5.1 Generate Customer Problem Report

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.5.1 Generate Customer Problem Report	
Brief Description	To be added.
Explanatory	This process is used to Create a new customer problem report including all necessary customer information. AM
Mandatory	Capture all the necessary customer information and related problem details and include them in the new Customer Problem Report. AM
Interactions	The Generate Customer Problem Report process will notify the Obtain Configuration Information process when the report creation is complete. AM
Salesforce Conformance Description	<p>Salesforce provides several mechanisms that would enable a Communications Service Provider to create a new customer problem report (through multiple channels). Case is the core business entity maintained in Salesforce to track customer issues and questions (referred to as problem report here). As explained in [REF1.3.7 - 42], a case can be created through one of the following mechanisms: automated fashion (Email2Case or Web2Case, automated script on behalf of an agent), self-service community, by an external system (through integration) and manually (by an agent).</p> <p>Details of the problem can be created in any standard field of the Case object. Salesforce also provides the capability to extend any standard object with custom fields to capture additional details. [REF1.3.7 - 43] is a training module that explains the roles of objects (standard and custom) that is used to store data.</p>

1.5.2 1.3.7.5.2 Obtain Configuration Information

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.5.2 Obtain Configuration Information	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	This process is used to get the service configuration information. AM
Mandatory	Acquisition of configuration information from the ITIL CMS and the placement of the customer problem in a known category and priority. AM
Interactions	The Obtain Configuration Information process will notify the Categorize & Prioritize Customer Problem process when the information is gathered. And will also interact with configuration management. AM
Salesforce Conformance Description	<p>As a requirement of ITIL processes (per ITSM guidelines), an enterprise needs to maintain information about Configuration Items required to deliver an IT service, including relationship between the configuration items. Many enterprises have used Salesforce standard object "Asset" for light configuration management (and using different Case record types to capture and manage Incident, Service Request, Problem and Change). However, we have seen mostly CSPs have used external systems (some available as application on Salesforce App Exchange for ITSM processes). Hence we are stating this requirement as a partial conformance.</p> <p>In an event, when an external system is being used for managing configuration items, Salesforce can play the role of being the customer engagement layer. Additional details on the network incident (stored in external ITSM system) can be acquired through OData integration mechanism. Salesforce supports the OData standard and allows the capability to present the remote data (configuration item, in this case) as a virtual object within the Salesforce platform. [REF1.3.7 - 05] provides additional details on External objects.</p>

Type and Priority are standard fields [REF1.3.7 - 18] in Case object that can be used to capture category and priority of a customer problem. Salesforce exposes all data (fields in objects) via a REST/SOAP API that provides full CRUD (create, retrieve, update, delete) capabilities. External systems can update fields of existing records in Salesforce through different options in *Remote Call-In* Integration pattern, as explained in Chapter 5 of [REF1.3.7 - 40]. These fields can also be edited manually on the Service Cloud console by an agent. As explained in [REF1.3.7 - 41], a CSP can configure a business process/workflow that can get triggered when type or priority fields are changed from null to a definite value. Hence, Salesforce conforms fully to the Interaction Requirement.

1.5.3 1.3.7.5.3 Check for major outage

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.5.3 Check for major outage	
Brief Description	To be added.
Explanatory	Check if the problem is general or specific. AM
Mandatory	Check if the problem is related to major system/service outage and not only to a specific customer or group of customers. AM
Salesforce Conformance Description	CSP can configure Service Cloud so that it notifies customers and agents when a new case is being created in a consistent fashion (independent of which channel was used to create the case): display in Service Cloud Console or access on the fly (by leveraging Salesforce support for External Objects). Please refer to [REF1.3.7 – 39] and [REF 1.3.7 – 05] for additional details.

1.6 1.3.7.6 Correct & Recover Customer Problem

1.6.1 1.3.7.6.1 Manage Product Restoration

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.6.1 Manage Product Restoration	
Brief Description	This process attempts to restore the purchased product offerings to a normal operational state as efficiently as possible AM
Extended description	Not used for this process element.
Mandatory	Attempts to restore the purchased product offerings to a normal operational state as efficiently as possible AM
Salesforce Conformance Description	<p>Salesforce Service Cloud provides a complete, 360-degree view of the Customer, including data about purchased product offerings, usually modeled with Asset object [REF1.3.7 - 03].</p> <p>Actual capability to restore a defective purchased offering to a normal operation state is usually available in the Operations Support Systems (OSS) domain (see [REF1.3.7 - 04] on how Salesforce integrates with BSS/OSS). Salesforce Service Cloud can provide all the integration capabilities to OSS to enable the Agent to work on the defective offering through Salesforce User Interface. A very common technique used by CSP is to use External Objects (Salesforce entities that map data located outside Salesforce) to fetch data from the external system in real time, through integrations based on OData protocol. Please refer to [REF1.3.7 - 05] for more details on how Salesforce supports External Objects. In addition, a CSP can also use “Request and Reply” Integration pattern (Chapter 2, [REF1.3.7 - 35]) provides an example on how Salesforce can display data from an external system via SOAP or REST.</p> <p>Efficiency for CSP can be improved leveraging some automation tools available to agents in Salesforce Service Cloud. Some relevant examples include use of Routing, Milestones and Macros. Please refer to [REF 1.3.7 – 37], [REF 1.3.7 – 33] and [REF 1.3.7 – 38] Additional diagrams were provided as a part of the detailed submission.</p>

1.6.2 1.3.7.6.2 Report Product Restoration Results

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.1.2 Report Product Restoration Results	
Brief Description	<p>This process reports successful restoration of normal operation or an unsuccessful attempt at restoration to Track & Manage Customer Problem through updates to the associated Customer Problem Report. AM</p>
Extended description	<p>Not used for this process element.</p>
Mandatory	<p>Reports successful restoration of normal operation or an unsuccessful attempt at restoration to Track & Manage Customer Problem through updates to the associated Customer Problem Report. AM</p>
Salesforce Conformance Description	<p>The Service Agent can attempt to restore the service normal operation through Salesforce Service Cloud Console using different tools (such as scripts enabled by Visual Flow, lookups in external systems that leverage integration patterns to Operating Support Systems (OSS), as described in process 1.3.7.6.1). As different stakeholders and systems work on a case, the status can be changed (manually or in an automated fashion) through integration.</p> <p>A CSP can communicate to a customer once a case is closed (or even during the case resolution process when a case is open) either manually or through automation capabilities (established through Lightning Process Builder, see [REF1.3.7 - 06]). Our response to L3 process (1.3.5.5 Notify Customer) provides detailed descriptions on how each of the following mechanisms can be adopted by a CSP to communicate with a customer:</p> <ol style="list-style-type: none">1. Standard Email Notification2. Notifications in Customer Community3. Salesforce LiveMessage4. Custom APEX program to send notifications5. Use Heroku to send mass notifications6. Leverage Notification capabilities of Marketing Cloud to send mass notifications (Email/SMS)

1.6.3 1.3.7.6.3 Determine Resolution Feasibility and Justification

LEVEL 4 PROCESS MAPPING DETAILS
<p>1.3.7.6.3 Determine Resolution Feasibility and Justification</p>
<p>Brief Description</p> <p>To be added.</p>
<p>Explanatory</p> <p>This process is used to check if the efforts put to resolve the problem are adequate to the resolution and also acceptable financially and business wise. AM</p>
<p>Mandatory</p> <p>Determine whether the problem can be resolved and what will be required. Identify if what is required to solve the problem is adequate to the problem business and financial impacts on the organization. AM</p>
<p>Salesforce Conformance Description</p> <p>Whilst Salesforce does not provide an out-of-the-box solution for this requirement, the capabilities of the platform can be utilized to build a custom estimation tool using point-and-click configuration.</p> <p>In the simplest case, a CSP can (with the help of custom code) perform calculations on data captured in Case object (based on the type and sub-types of the case, check with historical data for average effort, type of resource that need to be assigned) and determine whether any extra resource or skill would be required to resolve the case.</p>

1.6.4 1.3.7.6.4 Implement Customer Problem Workaround

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.6.4 Implement Customer Problem Workaround	
Brief Description	To be added.
Explanatory	<p>This process is used to execute an identified temporary solution for the customer problem. AM</p>
Mandatory	<p>Implement a temporary solution in parallel to finding a final fix. AM</p>
Interactions	<p>The Implement Customer Problem Workaround process will notify the Test & Validate Implemented Solution process when the implementation is complete.</p>
Salesforce Conformance Description	<p>Salesforce provide capabilities to identify viable workarounds for customer problem. Workarounds can be identified leveraging Salesforce Knowledge, which enables agents to easily find, access, and deliver the right answers to customers. For details about Knowledge see [REF1.3.7 - 08].</p> <p>Salesforce Service Cloud provide all the integration capabilities to OSS to enable the agent to implement the workaround through Salesforce User Interface and proper integration processes, as outlined in process 1.3.7.6.1. We understand that there may be situations when Salesforce can only initiate the execution in an external system.</p>

1.6.5 1.3.7.6.5 Test & Validate Implemented Solution

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.6.5 Test & Validate Implemented Solution	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	<p>This process is used to test an implemented temporary solution for the customer problem.AM</p>
Mandatory	<p>Test a temporary solution in parallel to finding a final fix.AM</p>
Interactions	<p>The Test & Validate Implemented Solution process will notify the Manage Product Restoration process when the test is complete.AM</p>
Salesforce Conformance Description	<p>Salesforce Service Cloud provide all the integration capabilities to OSS to enable the Agent to test and validate temporary fixes to a solution through Salesforce User Interface and proper integration processes, as outlined in process 1.3.7.6.1. External Objects (Salesforce entities that map data located outside Salesforce) can be used to fetch data (e.g. test/validation data) from the external system in real time, through integrations based on OData protocol. Please refer to [REF1.3.7 - 05] for more details on how Salesforce supports External Objects. We understand that there may be situations when Salesforce can only initiate the execution in an external system, and the actual test may be executed in an external system, not within core Salesforce platform.</p>

1.6.6 1.3.7.6.6 Initiate Change Request

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.7.6.6 Initiate Change Request	
Brief Description	To be added.
Extended description	Not used for this process element.
Explanatory	<p>This process is used to initiate a change request to implement a final fix for the customer problem. AM</p>
Mandatory	<p>The problem analysis will initiate a change request to implement a final fix. The request contains:</p> <ul style="list-style-type: none">- Full description of the requested fix and problem.- Financial and business justification.- Management approval. AM
Salesforce Conformance Description	<p>After the proper analysis on customer problem, it is possible to initiate a Change Request to implement a Fix. The change and fix requests can be customized based on specific customer needs using the Salesforce platform tools, so it can be modeled to include all needed description financial fields. To ease the job, a prebuilt “Bug Tracking and Quality Assurance” app is available (free) from Salesforce Labs on Salesforce AppExchange, see [REF1.3.7 - 09]. The fix request can be submitted to Management Approval: the approval process required to process the request can be tailored to Service Provider needs leveraging the Salesforce ‘Approvals’ capability.</p> <p>Salesforce provides the tools to define an approval process, which is an automated process CSP’s can use to approve records. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step.</p> <p>Starting Spring ‘16 Release, Salesforce has also introduced a new standard object - Work Orders which can be triggered to implement the final fix, once it is identified as a resolution to the problem [REF1.3.7 - 50]. Additional diagrams were provided as a part of the detailed submission.</p>

1.6.7 1.3.7.6.7 Review Major Customer Problem

LEVEL 4 PROCESS MAPPING DETAILS
1.3.7.6.7 Review Major Customer Problem
Brief Description To be added.
Extended description Not used for this process element.
Explanatory This process is responsible for assessing problems regarded as having major impacts. AM
Mandatory To review the resolution of customer problems that have been categorized as major impact, in order to prevent recurrence and learn lessons for the future. AM
Salesforce Conformance Description Salesforce provides various means to review and discover patterns in the data – Wave Analytics and Einstein (Artificial Intelligence capability from Salesforce, available from Winter’17 Release). Einstein adds machine & deep learning, predictive analytics and natural language processing to the core Customer Success Platform. These fundamental AI capabilities can be further enhanced by different Salesforce products across the enterprise. Salesforce Intelligence Platform (Einstein) combined with its Analytics Smart Pattern Discovery technology (BeyondCore ¹) examines all possible variable combinations in a dataset and exhaustively finds all of the insights, through a combination of machine learning and regression analysis to define mathematical relationships in the data, pointing out which findings are important for the user to examine for customer problem occurrences, and why they are statistically significant, without requiring the business user to build mathematical models or write algorithms [REF1.3.7 - 12].

¹ Salesforce has recently acquired BeyondCore in 2016 as a new component of Analytics Cloud (for Smart Data Discovery). As new functional capabilities are being integrated within the Salesforce platform, additional details can be obtained from [here](#)

We have provided additional details on the functioning of BeyondCore in our responses to the following processes - 1.3.4.1.2 (Analyze & Manage Customer Risk) and 1.3.4.1.3 (Personalize Customer Profile for Retention & Loyalty).

Additional diagrams were provided as a part of the detailed submission.

2 Salesforce Products

Salesforce products referenced in this Document:

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

3 Supporting Evidence References (Works Cited)

[REF1.3.7 - 01]	Guide: Implementing Salesforce visual workflow
[REF1.3.7 - 02]	Complete guide: Salesforce Knowledge
[REF1.3.7 - 03]	Documentation: What are Assets
[REF1.3.7 - 04]	Article: Reimagining Business Agility with Communications BSS & OSS on the Cloud
[REF1.3.7 - 05]	SOAP API Developer Guide: External Objects
[REF1.3.7 - 06]	Documentation: Lightning Process Builder
[REF1.3.7 - 07]	Blog: The Future of Customer Service is Here: Introducing Service Cloud Einstein
[REF1.3.7 - 08]	Documentation: Salesforce Knowledge
[REF1.3.7 - 09]	AppExchange: Bug Tracking and Quality Assurance
[REF1.3.7 - 10]	Documentation: Approvals
[REF1.3.7 - 11]	Documentation: Explore and Visualize your Data
[REF1.3.7 - 12]	FAQ: What are the four types of analysis and graphs (or "figures") available in BeyondCore?
[REF1.3.7 - 13]	Technical Library: Workflow Rules
[REF1.3.7 - 14]	Documentation: Validation Rules
[REF1.3.7 - 15]	Documentation: Apex Developer Guide
[REF1.3.7 - 16]	Technical Library: Chatter
[REF1.3.7 - 17]	Documentation: Entitlement
[REF1.3.7 - 18]	SOAP API Developer Guide: Case
[REF1.3.7 - 19]	Documentation: Case Feed and Related Lists
[REF1.3.7 - 20]	Documentation - Set Up Interaction Logs for a Salesforce Console

[REF1.3.7 - 21]	Documentation - Work on Open Activities and View Activity History in Salesforce Classic
[REF1.3.7 - 22]	Salesforce Help: Reports and Dashboards
[REF1.3.7 - 23]	Documentation - Customizing Reports
[REF1.3.7 - 24]	Implementation Guide - Case Management
[REF1.3.7 - 25]	Documentation - Close Cases
[REF1.3.7 - 26]	Documentation - Set up Assignment Rules
[REF1.3.7 - 27]	Documentation: Transferring Records
[REF1.3.7 - 28]	Documentation - Workflow
[REF1.3.7 - 29]	APEX Developer Guide - Triggers
[REF1.3.7 - 30]	Documentation - Field History Tracking
[REF1.3.7 - 31]	Documentation: Case Feed Overview
[REF1.3.7 - 32]	Implementation Guide: Visual workflow
[REF1.3.7 - 33]	Documentation: Milestones
[REF1.3.7 - 34]	Documentation: Entitlement Processes
[REF1.3.7 - 35]	Integration Patterns and Practices - Winter 17 Release Document
[REF1.3.7 - 36]	Overview: Using Ideas
[REF1.3.7 - 37]	Documentation: Routing
[REF1.3.7 - 38]	Documentation: Macros
[REF1.3.7 - 39]	Implementation Guide: Salesforce Console
[REF1.3.7 - 40]	Integration Patterns and Practices - Winter 17 Release Document
[REF1.3.7 - 41]	Documentation on Set the Criteria for Your Workflow Rule
[REF1.3.7 - 42]	Documentation on Create Cases
[REF1.3.7 - 43]	Trailhead Module - Understand Custom and Standard objects
[REF1.3.7 - 44]	Knowledge Article - List of Standard Reports and their purpose
[REF1.3.7 - 45]	AppExchange from Salesforce Labs: Service and Support Dashboards

[REF1.3.7 - 46]	Documentation - Audience Builder
[REF1.3.7 - 47]	Technical Library: Introduction to Salesforce to Salesforce
[REF1.3.7 - 48]	Developer Documentation: Chatter REST API (Follow a Record)
[REF1.3.7 - 49]	Winter Release: Omni-Channel for Administrators
[REF1.3.7 - 50]	Spring '16 Release Notes: Introducing Work Order
[REF1.3.7 - 51]	Developer Documentation: Visualforce Developer Guide