

30% Drop in Escalations and 25% Boost in Agent Efficiency

Achieved with a Custom Reporting Framework in Salesforce Service Cloud



Client Overview

 Industry Computer and Network Security	 Region Foster City, CA	 Company Size 1,001-5,000 Employees	 Featured Solution Salesforce Service Cloud; Visualforce and Apex
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About the Client

The customer is a US-based leader in cloud-based security and compliance solutions, serving over 10,000 subscription clients across 130+ countries, including many of the Forbes Global 100 and Fortune 100 companies. Their unified platform helps organizations streamline and automate security and compliance operations, driving greater agility, improved business outcomes, and significant cost savings.

Unoptimized Knowledge Base = Inefficient Service Operations

The customer relied on Salesforce Service Cloud to manage a robust knowledge base for both internal and external users. They faced key limitations that impacted efficiency and content effectiveness:

- **80% of knowledge articles lacked actionable feedback**, creating a data gap restricting continuous content optimization and alignment with real user needs.
- **Agents spent more time on case resolution** due to outdated or fragmented knowledge content that slowed down issue resolution.
- **Native reporting capabilities offered limited visibility into feedback trends**, making it difficult to evaluate content effectiveness or surface high-impact insights.
- **Absence of structured feedback categorization** made it challenging to identify, prioritize, and act on content improvement opportunities at scale.



The Business Impact: Escalating Costs and Delayed Resolutions

The challenges had a measurable impact on the customer's support operations and overall business efficiency.

Case escalations increased by 30%, as users turned to support channels for answers that should have been available via self-service.	Operational costs escalated by 20%, driven by inefficiencies and an increased support workload.	Limited reporting capabilities reduced insight into content performance, slowing down improvement cycles.
Outdated articles and poor findability prolong resolution times, increasing the burden on support teams.	Resource planning and allocation became misaligned, affecting long-term service strategy and responsiveness.	

Optimizing Knowledge Base Reporting with Visualforce & Apex

To address the customer's challenges, we implemented a comprehensive solution tailored to the customer's specific needs.

What Our Certified Experts Executed

- Created a custom reporting framework within Salesforce using Visualforce and Apex to build the UI and backend functionality. This framework allowed for more flexible and detailed reporting than standard Salesforce features.
- Developed reports that provided insights into voting patterns, differentiating between votes from internal users (such as employees) and community users (such as customers).
- **Created four distinct types of reports:**
 - 'Votes Count', which provided a simple tally of votes
 - 'Voting Details', which offered a more granular look at who was voting and how
 - 'Customer Votes Count', which focused specifically on customer feedback
 - 'Customer Voting Details', which provided detailed insights into customer voting patterns.
- Enabled brief Excel reports and email notifications for all four report tiles, allowing users to easily share and review voting data without logging into Salesforce

Driving SLA Success Powered by Smarter Knowledge Base Insights

By gaining deeper visibility into knowledge base article performance, the customer significantly improved operational efficiency. With access to detailed voting insights, support agents could identify and rely on high-performing content, leading to faster case resolution times and improved SLA compliance. As knowledge became more relevant and accurate, case escalations dropped noticeably. The enhanced reporting capabilities also empowered leadership to make informed content strategy and resource planning decisions.



Highlights

<p>20%</p> <p>Increase in SLA Compliance</p>	<p>25%</p> <p>Improvement in Agent Efficiency</p>	<p>30%</p> <p>Reduction in Case Escalations</p>
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Conclusion

"Partnering with Grazitti helped us bring structure to our feedback loops. Their phased rollout approach helped us turn insights into action, enabling our agents to deliver faster, more efficient resolutions."

