



Setting up Salesforce Voice with Amazon Connect for Superior Support Operations

THE CUSTOMER

The customer is a provider of financial planning & analysis (FP&A) cloud software. Their platform is used around the globe to streamline business-wide planning, budgeting, consolidations, reporting, and visual analytics. Trusted by more than 1000 customers, their platform can accelerate cycle times, increase productivity, and improve accuracy across the end-to-end FP&A process.

THE CONTEXT

The customer was using Zendesk as their CRM and even had a voice channel set up in Zendesk for better support operations. However, they wanted to migrate from Zendesk to Salesforce, as Salesforce better suited their business goals and needs.

THE OBJECTIVE

The customer wanted to migrate from Zendesk Support to Salesforce and set up their Salesforce Service Cloud. Similar to how they were providing phone support to their customers via a voice channel on Zendesk, they were looking to set up a phone support channel that is compatible with Salesforce. They wanted to partner with an organization with extensive expertise in Salesforce that could provide a cost-effective solution and improve customer and agent experience.



Successfully Migrated from Zendesk to Salesforce



Set up Salesforce Service Cloud and Experience Cloud



Enabled Salesforce Cloud Voice With Amazon Connect



Enabled Amazon Transcribe and Call Control



Configured Multi-Lingual Call Center for Multiple Regions

THE SOLUTION

After analyzing the customer's goals, team Grazitti:



Migrated the entire ticketing system from Zendesk to Salesforce without any data loss.



Set up the entire Salesforce Service Cloud and Salesforce Experience Cloud from scratch for better CX.



Integrated their Salesforce Service Cloud with Jira with our in-house connector, Sinergify, to enable their users to create and manage their Jira issues directly from Salesforce.



Enabled Amazon Transcribe to capture call recordings and transcribe human speech-to-text for meeting notes.



Set up assignment rules and omni-channel call routing rules using Queues on Salesforce. Personal ID to each service agent was given for better service operation.



Enabled advanced phone support features on Service Console, like the Call Control tool, which is linked to the Omnichannel widget that provides access to all communication in one place.



Set up Service Cloud Voice with Amazon Connect.



Configured multi-lingual call center for the Japanese region.

THE OUTCOME

With Grazitti's help, the customer was able to successfully migrate from Zendesk to Salesforce without disrupting their daily operations. They witnessed better collaboration between Support and Engineering teams with **Sinergify**. Additionally, with Service Cloud Voice with Amazon Connect, they were able to reduce the manual efforts of agents and deliver better support operations. With the AI capabilities of Amazon Connect, their support supervisors could track real-time conversations between the agents and customers. Additionally, the call routing rules on the Omnichannel widget enabled their support agents to deliver faster responses and a better customer experience.

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SCAN CODE

