

Case Study

# Driving 20% Faster Case Closures With Einstein-Powered Chat, Wrap-Up, and KBA Automation



<b>Overview</b>	Context	Challenges	Solutions	Business Outcome	Conclusion
-----------------	---------	------------	-----------	------------------	------------

## Client Overview

 <p><b>Industry</b> Software Development</p>	 <p><b>Region</b> USA</p>	 <p><b>Company Size</b> 201-500 Employees</p>	 <p><b>Featured Solution</b> End-to-End Case Automation Using Einstein</p>
---	--	--	---

## About the Client

A recognized leader in Financial Planning & Analysis (FP&A) cloud solutions, the company empowers organizations to navigate complex financial landscapes with precision and agility. Their cutting-edge platform, trusted by 1,000+ enterprises worldwide, streamlines planning, budgeting, forecasting, and reporting—driving faster, data-backed decision-making.

## Support Ops Were Functional, But Far from Scalable

Despite having Salesforce Service Cloud, Experience Cloud, Voice, Data, and Sales Cloud in place, the customer's support function was hitting a ceiling. Key workflows were still heavily manual and placed too much reliance on individual agent effort.

- Agents had to manually search for answers during live chats, slowing down resolution.
- Every case required manual summaries and documentation, increasing average handling time.
- Post-resolution knowledge wasn't captured fast enough, leading to repetitive issue handling and limited knowledge reuse.
- The absence of proactive insights meant high-risk cases often escalated unnoticed.

In short, the tools were there, but the experience was not intelligent, consistent, or scalable.



## High Time-to-Resolution, Overworked Agents, and Bottlenecks to Scale

Without automation in place, the customer faced several challenges as their end-to-end flow could take over 30 minutes per interaction, resulting in an inability to scale support with growing customer demands.

### Lower Agent Efficiency

Agents spent over 50% of their time on non-resolution tasks like summarizing chats and searching internal documentation.

### Delayed Customer Responses

Manual KB searches slowed chat responses, leading to longer wait times and lower CSAT.

### Limited Scalability

With each interaction requiring manual effort, support volumes couldn't grow without additional hiring.

### Underutilized Knowledge Base

Valuable insights were lost or delayed due to the time it took to write and publish post-resolution articles.

## Intelligent Automation with Minimal Disruption

With deep Salesforce AI expertise and a focus on operational scale, we reimagined the customer's support workflows, without requiring a disruptive overhaul of their existing Salesforce stack. Our goal was simple: turn their manual support processes into an intelligent, AI-assisted engine that could scale.

**We implemented a tightly integrated set of Einstein AI capabilities that tackled inefficiencies across the support lifecycle:**

### 1. Einstein Service Replies (for Chat)

During live chats, Einstein surfaces context-aware responses sourced from the knowledge base. Agents simply review and send, enabling faster, more consistent replies.

### 2. Einstein Work Summaries

After every interaction, Einstein automatically populates the case subject, description, and closure summary. It also generates email summaries and voice call notes, eliminating manual wrap-up and ensuring quality documentation.

### 3. Case Timeline

We enabled a chronological view of every case interaction, giving agents a clear, timestamped summary of events, improving handoffs and reducing rework.

### 4. Draft Knowledge Base Articles

Post-resolution, Einstein drafts a KBA directly from the case transcript. Agents only need to review and publish, dramatically improving knowledge reuse and reducing article creation lag.

### 5. Similar Cases (via Salesforce Data Cloud)

Using Salesforce Data Cloud, we reduced turnaround on recurring issues, so agents could instantly view similar past cases and resolutions, improving first-contact resolution.

### 6. Escalation Prediction (Prompt Builder)

Using customer sentiment analysis across emails and comments, we created a predictive model to flag cases likely to escalate.

## Key Outcomes: Time Savings, Scale, and Higher-Value Support

Agents now save 10–15 minutes per case across the full support lifecycle, from chat response to case closure and knowledge article creation. With ~650 chats handled last year, this translates to 6,500–9,750 minutes saved, equivalent to 108–162 hours annually. That's nearly a month of support capacity gained without increasing headcount. With routine tasks automated, agents focus more on complex, high-priority cases, boosting service quality and job satisfaction.



## Highlights

 <p>10-15 Minutes Saved Per Case</p>	 <p>650 Chats Handled Annually, Resulting in 108-162 Hours Saved</p>	 <p>100% Automation of Draft KBAs and Wrap-Up Summaries</p>	 <p>5% Increase in CSAT</p>
---	---	--	--

## Conclusion

By strategically embedding Einstein AI into the existing Salesforce environment, we delivered intelligent automation with minimal disruption. The customer now enjoys a streamlined support lifecycle that saves time, boosts agent productivity, scales effortlessly, and enhances knowledge reuse.

