

Increasing Agent Productivity by 20% through Einstein Case Wrap-Up Implementation for a Finance Company

HIGHLIGHTS



Successful Configuration of Einstein Case Wrap-Up & Reply Recommendations



100% Improvement in Case Wrap-Up Process



20% Increase in Agent Productivity



Better & Accurate Reporting

THE CUSTOMER

The customer is a pioneer in providing free credit scores and ensuring financial progress for more than 10 million members. They enable customers with powerful tools for credit and identity monitoring, credit card recommendations, growing their savings, filing their taxes, and more to make managing finances easy.

THE CONTEXT

The customer was using Salesforce Service Cloud to handle their service operations. Owing to their vast operations, their support teams receive a substantial influx of cases (10,000-12,000) daily from chat, email, web, and phone. This resulted in agents facing challenges in manually updating mandatory fields (10-12) before closing a case. Consequently, valuable time is lost and overall agent productivity is diminished.

THE OBJECTIVE

The customer wanted to ensure accurate reporting, accelerated case closure, and higher agent productivity. They wanted to automate the process of updating multiple mandatory fields before closing a case. They wanted a Salesforce partner with extensive knowledge and expertise who could help them eliminate the guesswork involved in filling out case fields, enabling agents to efficiently, accurately, and consistently resolve cases.

THE SOLUTION

After analyzing the customer's requirements, team Grazitti:

- Reviewed their data requirements, set up **Chat** for **Einstein Case Wrap-Up**, and activated the **Einstein Classification** apps.
- Configured a classification model by selecting the app type, choosing case fields to predict, and providing closed cases. We used 400 closed cases from the past 6 months on MS Training to customize and build a prediction model for Einstein to analyze their closed-case data.
- Identified and configured field prediction settings, including when Einstein recommends, selects, or saves field values.
- Granted agents the access to the field recommendations component and activated their model to enable predictions for them.
- Additionally, set up **Einstein Reply Recommendations** for their team to fast-track their response time.

THE OUTCOME

With Grazitti's assistance in configuring the Einstein Case Wrap-Up feature, the customer was able to unlock valuable insights with historical data analysis.

They witnessed:

- 100% improvement in the case wrap-up process, leading to substantial time savings for agents.
- Accurate and precise reports derived from the closed cases that played a pivotal role in enhancing knowledge base content, refining agent training programs, and streamlining the hiring process
- Faster and more accurate response to customer inquiries using **Einstein Reply Recommendations**.
- 20% increase in agent productivity and overall operational efficiency since redundant manual efforts and errors in updating case closure fields were eliminated.