![Grazitti Interactive - Marketing for Digital Natives]

Case Study

Unlocking 20% Higher Efficiency and Automation with Custom Agentforce Solutions

Client Overview

Industry
Financial Performance-Software Services

Region
California, USA

Company Size
Medium-Sized Business
500+ Employees

Featured Solution
Salesforce Agentforce

About the Client

The customer is a US-based cloud platform specializing in financial planning and analysis (FP&A), designed to help businesses simplify budgeting, forecasting, and financial reporting. They empower Finance and Accounting teams to plan, close, and report with speed and precision, help Human Resources craft effective people strategies, support Marketing in delivering greater value, and ensure teams across the organization thrive in any environment.

Lack of Case Visibility Leading to Resolution Delays

The customer was using Salesforce Service Cloud for their support operations but encountered a few roadblocks. Case management became challenging due to frequent reassignments and numerous managerial reviews, which added complexity and delays. Additionally, routine tasks required constant manual interventions, hampering overall efficiency.

They also struggled with predicting and managing potential escalations, leading to reactive rather than proactive responses. Support agents found it difficult to access related cases quickly, which further delayed resolutions. Inadequate case summaries limited visibility, making it difficult for the team to get a complete view of each case.

The Impact of Reactive Support on Customer Relationships

The challenges the customer faced had an impact on their business, leading to:

Longer Resolution Times
Inefficiencies in case identification and management increased resolution times, driving up operational costs and lowering customer satisfaction.

Reduced Productivity
Unstreamlined processes caused delays, leading to bottlenecks in support workflows and overall reduced productivity.

Higher Overheads
Frequent reassignments and excessive managerial reviews meant that resources were not used efficiently, resulting in increased overhead costs.

Escalation Issues
The inability to proactively predict and manage escalations caused an increase in escalated cases, straining the support team and damaging customer relationships.

Limited Visibility
Inadequate case summaries made it difficult for leadership to monitor issues effectively, compromising decision-making and strategic planning.

Turning Case Management Challenges into Proactive Solutions with Agentforce Customization

To help the customer overcome their challenges, we implemented a series of customized solutions aimed at streamlining their support operations.

What Our Salesforce Certified Experts Executed

1. Escalation Prediction

Using Salesforce Prompt Builder on Agentforce, we addressed escalation challenges by analyzing real-time interactions. We built predictive prompts to assess escalation likelihood, tone, sentiment, communication gaps, and urgency, enabling proactive responses and reducing the frequency of escalated cases.

2. Get Similar Cases

To speed up case resolution, we created a custom Apex class and configured Prompt Builder to query and display related cases. This allowed support agents to quickly access similar cases, reducing search time and improving resolution efficiency.

3. Case Timeline Summary and Sentiment Analysis

We created custom objects—'Timeline Summary' for a high-level case overview and 'Timeline Details' for granular tracking—and integrated sentiment analysis. Using Prompt Builder and custom Apex code, we ingested case data to provide managers and reassigned agents with clearer insights into case history and customer sentiment for faster, informed decision-making.

4. Sentiment-based Email Auto Draft Response

Created a custom feature that utilizes case data, including case comments and related emails, to identify whether the last email was sent by an agent or a customer, assesses customer sentiment across all communications, and generates an appropriate response—a follow-up if the agent emailed last, or a case update if the customer did.

Automate Tasks, Maximize Efficiency: Agentforce for Seamless Support

Our Salesforce-certified experts enhanced the client's support operations using Agentforce and Salesforce Prompt Builder. We predicted escalations by analyzing tone, sentiment, and urgency, reducing escalated cases and enabling more proactive responses.

By automating previously manual tasks, the client was able to improve operational efficiency, reduce customer escalations through improved visibility, and cut down transfer time significantly.

Highlights

20% Boost in Operational Efficiency

Save 3–4 Minutes Per Email with Smart Automation

15% Fewer Customer Escalations via Real-Time Alerts

10 Minutes Saved Per Case with Quick Timeline Overviews for Transfers

Conclusion

What used to be a repetitive cycle of manual tasks is now handled seamlessly with automation. With delays reduced, our team can focus on faster responses and delivering real value, completely transforming our support operations.