



# SALESFORCE SERVICE INTELLIGENCE

A VALOIR REPORT

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Multiple channels, data sources, applications, and processes have made delivering customer service more complex, and service teams need to make sense of the flood of data to personalize and optimize customer interactions. Salesforce Service Intelligence is an intelligent out-of-the-box application that combines dashboards and templates leveraging Service Cloud Einstein, Einstein artificial intelligence (AI), Einstein Conversation Mining, Tableau, and Data Cloud to provide a single source of insight for data-driven service optimization. In Valoir's initial look at Service Intelligence, we found it had the potential to empower agents, deliver greater automation, and give service leaders the insights needed to optimize service operations, driving increased efficiency and productivity, better technology management, and improved customer experiences.

Customer service teams face many challenges in their mission to deliver a personalized, differentiated customer experience:

- The rise and growth of new channels has increased the number of applications and systems housing customer interaction data as well as the volume of data.
- Although bots and self service have automated some customer interactions, customers who do interact with agents expect a higher level of knowledge and personalization – often requiring agents to swivel between applications, systems, and data sources.
- Despite increased volumes and demand, service teams are under pressure to reduce costs and increase efficiency while improving customer satisfaction.

For many organizations, these challenges mean service leaders are focused on the day-to-day challenges of meeting service level agreements (SLAs) and customer demands, and simply don't have the resources to make strategic investments in integrating data sources, analyzing signals, and making data-driven decision that drive automation, efficiency, and improved customer satisfaction.

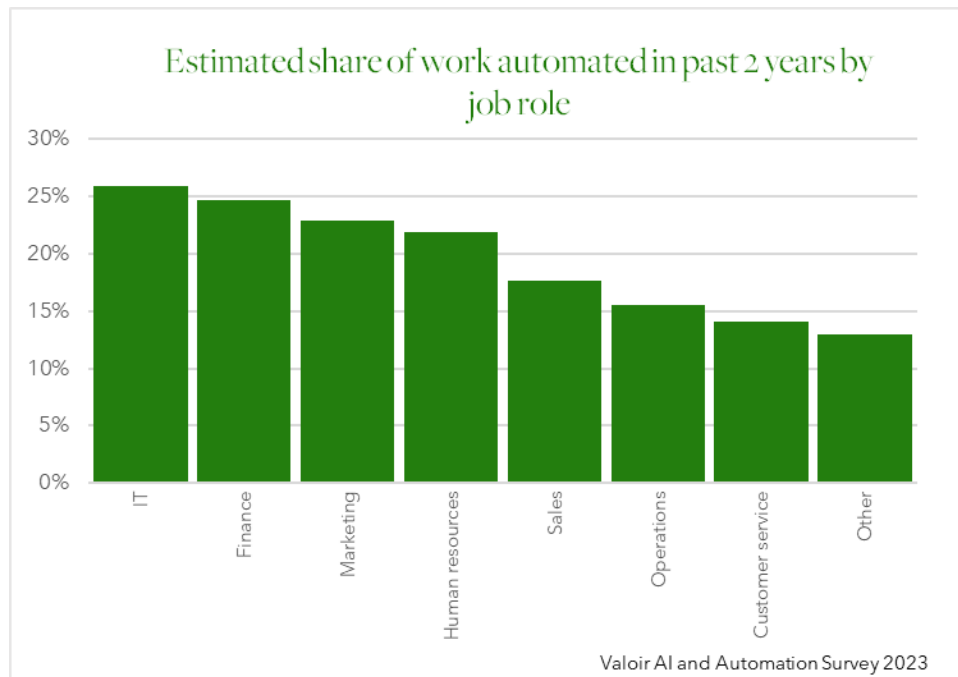
In fact, in Valoir's recent global study *Assessing the value of AI and automation*, we found that customer services organizations lagged far behind other departments in automating manual processes. While IT, finance, marketing, and human resources had automated more than 20 percent of work in the past two years, customer service teams had automated only 14 percent of work – despite the high potential for automation.

According to service leaders, the main reason for this gap is not a lack of data, but too much data. With multiple applications and systems housing customer-related data, even those organizations with dedicated business analysts are challenged to integrate, normalize, and analyze that data on an



Lack of visibility into data has hindered service organizations' ability to take advantage of automation.

ongoing basis to make intelligent decisions about automation, workforce and channel optimization, and allocation of resources.



Even with devoted analyst resources, few service leaders are able to understand customer interaction trends in real time and use that data to predict and act on those trends, analyze the data at scale to make more strategic product and service strategy decisions, or have a real-time view of individual agent key performance indicators (KPIs) and metrics to know where to focus their time and training and build more automation.

To address these challenges, Salesforce developed Salesforce Service Intelligence.

## Salesforce Service Intelligence

Salesforce Service Intelligence is a prepackaged application built on Data Cloud that combines Service Cloud best practices, customized features, pre-built dashboards, and calculated insights to provide service leaders and agents with real-time insights into service performance and customer trends. Components of Service Intelligence include:

- Service Cloud Einstein. Service Cloud Einstein extends the capabilities of Service Cloud with conversational artificial intelligence (AI), analytics, and automation for service.
- CRM Analytics (CRMA) Plus. A native analytics platform for Salesforce which includes data management, data visualization, and AI-powered predictive capabilities in the flow of work in Salesforce, CRMA Plus powers the out-of-the-box Service Intelligence

dashboards. CRMA Plus can also be used by customers to build their own custom dashboards and predictions.

- Einstein Conversation Mining. Conversation Mining uses natural language processing (NLP) to identify the most common types of interactions with customers and their key characteristics, average conversation frequency, and time and complexity to resolve to help service teams identify the best opportunities for automation.
- Tableau. Tableau provides deep data exploration capabilities that allow Service Intelligence users to dig further into their data to identify trends and further optimize service operations. It is natively integrated with Salesforce so Tableau visualizations can be published back into Service Intelligence as needed.
- Data Cloud credits. Data Cloud is consumption based; Data Cloud credits included in Service Intelligence enable users to connect to Salesforce and other customer data sources and analyze that data in Tableau.

Service Intelligence is part of Salesforce Unlimited Plus and is available for other customers on a per-user monthly license basis.

## Key benefit areas

Valoir identified four main areas where organizations can benefit from Service Intelligence: increased efficiency, increased productivity, improved technology management, and improved customer experience.

### INCREASED EFFICIENCY

Valoir found that the insights delivered by Service Intelligence can enable service leaders to more quickly identify and act on opportunities to improve efficiency in three main areas:

- Automating frequent manual workflows. With Einstein Conversation Mining, for example, managers can quickly identify the most common types of e-mail and chat interactions with customers and the number and type of steps required to resolve the customer issue. Einstein bots can be used to create workflows that accelerate the resolution of common customer issues and reduce the burden on agents.
- Pinpointing common areas of friction. With dashboards that help leaders view agent performance metrics such as speed to answer, they can identify coaching and training opportunities or the need for enhanced knowledge articles that will help agents reduce time to resolution and reduce escalations. Einstein Next Best Action and Article Recommendation can accelerate delivery of resolution for both agent-assisted and self-service interactions.
- Optimizing work. Dashboards give both agents and service leaders a holistic view of the KPIs they need to measure business success to stay on top of performance and prioritize teams' and individuals' time. The omni-channel dashboard, for example, helps managers

track routing efficiency and agent performance across channels and see how effectively they are optimizing resources.

## INCREASED PRODUCTIVITY

In addition to driving increases in efficiency across systems and processes, Valoir found that Service Intelligence can increase the individual productivity of managers and agents by providing them with role-specific insights in the flow of work, and increase administrator and business analyst productivity as well.

For managers, rather than having to ask a business analyst to develop backward-looking reports on specific metrics, they can rely on prebuilt dashboards that provide an immediate snapshot of agent performance. They can quickly see performance by queue and channel and reduce the time spent understanding asset utilization, escalation, and other trends that negatively impact service delivery. In the area of escalation management, for example, they can rely on Einstein Conversation Mining to rapidly understand trends based on an analysis of all cases, not just a sampling of cases they have the time to manually review. Managers can also set specific KPIs for monitoring and receive alerts based on predefined thresholds.

For service agents, a dashboard that helps them understand their performance against other team members, which cases they should prioritize based on customer value and other factors, and what steps they can take to reduce customer friction can save time while helping them make data-driven decisions. Automated case classification and wrap-up can further reduce the administrative time needed to capture and close a case.

On the administrator and business analyst side, prebuilt dashboards, templates, and data models for service accelerate the time to deployment of new intelligent service capabilities while reducing the expertise needed to successfully deploy and manage them.

Depending on the size and complexity of a service operation and the number of applications and systems containing customer-related data, Valoir conservatively estimates that the prebuilt capabilities of Service Intelligence could enable Service Cloud customers to save from .5 to 1.5 business analysts per year on an ongoing basis while delivering more real-time insights to service leaders and agents.

## IMPROVED TECHNOLOGY MANAGEMENT

Beyond the reduction in time and expertise needed to deploy Service Cloud with the prebuilt templates, dashboards, and integrations provided, Service Intelligence obviously means less need for customization and configuration of Service Cloud, Einstein, and CRM Analytics. On an ongoing basis, fewer custom objects, workflows, and integrations means less complexity to support, fewer dependencies that must be tested to ensure compatibility with new releases and integrations, and a lower ongoing burden on administrators and business analysts.



Service Intelligence can enable customers to save from .5 to 1.5 business analysts on an ongoing basis while delivering greater insights.

For many Service Cloud users, this will also mean more streamlined vendor management, as they will be able to leverage the insights from Service Intelligence rather than stitching together multiple integration, business intelligence, predictive analytics, and AI technologies from different vendors.

## IMPROVED CUSTOMER EXPERIENCE

Ultimately, the goal of more intelligent service is improving customer service and customer satisfaction. Providing service leaders and managers – as well as agents – with a single source of truth and calculated insights such as customer effort scores and propensity to escalate will help them to better understand customer issues before they become problems. Ongoing, consistent measurement of service-level agreement (SLA) adherence, customer satisfaction, and other customer experience metrics can help those leaders focus on strategic customer experience improvements rather than tactical day-to-day operations.

Service Intelligence can also help organizations deliver more proactive service. For example, Einstein Next Best Action can be used combined with the Customer Effort Score to suggest giving a customer a discount when they've had a challenging service interaction, or combined with product insights from Einstein Conversation Miner to recommend scheduling a maintenance check.

## Looking ahead

The first release of Service Intelligence can help new Service Cloud customers accelerate time to value from their Service Cloud instance while driving more data-driven service improvements on an ongoing basis. It can also help existing Service Cloud customers drive more effective service and more productive managers and agents while reducing the burden on business analysts. Salesforce's planned roadmap for Service Intelligence include:

- Einstein Copilot provides a conversational interface that enables service managers to gain further insights on service performance trends and issues without needing to know the source, dashboard, or underlying data needed to deliver the insight.
- Service Cloud Feature ROI provides telemetry data that shows service leaders how agents and customers are using specific Service Cloud capabilities to help them identify further opportunities for automation, training, or other changes in Service Cloud that could help deliver more value.
- Additional calculated insights such as propensity to churn, customer lifetime value, and propensity to escalate will help service managers and agents take more informed, personalized actions with specific customers.

As service leaders continue to be challenged to drive both increased efficiency and improved customer satisfaction, solutions such as Service Intelligence are an important step toward bringing together the data and

insights they need to make intelligent decisions about service automation, resource allocation, and optimization of both agent and customer experiences.

*Valoir is a technology analyst firm providing research and advisory services with a focus on the value technology delivers. With deep expertise in CRM, HCM, customer and employee experience, and enterprise applications, Valoir helps clients understand and maximize the value of technology. For more information, contact Valoir at [www.Valoir.com](http://www.Valoir.com) or 1-617-515-3699.*