

case study -

Large software company optimizes client support processes in Salesforce service cloud

Salesforce

Case Managements

Work Orders

Outlook Service Rocket

Jira

Zoom

Company

A large, software and data management company serving government organizations

Customer since

2019

Goals

- ✓ Adopt the Salesforce Service Cloud for initiating and managing Support Cases and Work Orders
- ✓ Automate manual processes to improve consistency and efficiency
- ✓ Gain visibility across work in progress, and reduce email-based communications and collaboration
- ✓ Simplify workflows through integrations with issue tracking, telephony, video conferencing and scheduling apps

Moving service processes and workflows to the Salesforce Service Cloud

Resolute's client is a privately-held company that provides software and data management, integration and exchange solutions for public safety, law enforcement and other public sector entities of all sizes and tiers.

The company offers two solutions to help ensure officer and citizen safety through better, more cost-effective information management, sharing, integration and analysis:

→ **A real-time data source integration, exchange and sharing platform**

that provides real-time cross-jurisdictional data sharing and exchange for police departments and all other law enforcement, public safety and criminal justice agencies.

→ **A simplifying management solution**

A solution for public safety, regulatory, law enforcement, and homeland security agencies that simplifies records management, computer-aided dispatch, case management, corrections applications and other mission critical functionalities.

With such mission-critical applications, efficient, consistent and error-free processes for initiating service requests and work orders is essential. But legacy technology and a lack of purpose-built solutions were getting in the way.

A long-term client of Resolute Software, the company reached out for help with transitioning the Service team's processes and workflows to the Salesforce Service Cloud. Working with Resolute, the client's team optimized support and installation processes in Salesforce, and integrated systems with Salesforce to support their daily workflows, eliminating costly and error-prone manual tasks.



“Before engaging with Resolute, we were struggling to make our system fit our needs. Now we have a purpose-built solution that provides greater visibility and transparency, and simplifies our processes through automation. As a result, our team, as well as the project managers, have more time to focus on providing exceptional service to our customers.”

- Vice President of Technical Operations

Eliminate manual tasks and streamline workflows through automation

The client's Service organization is responsible for implementing and configuring software for clients. Customers need to be trained on how to use the software, since it's highly customized to the clients' individual needs. Whether it's a technology implementation, service request or training event, everything must be tracked using work orders.

The Service team had been leveraging proprietary software for managing their service and installation work orders and processes, but it fell short of their needs because it wasn't purpose-built for those tasks. Communication around service and support cases involved sending a lot of emails and toggling between disparate systems.



the challenge –

Project managers would use an email template to provide relevant information to the Services team, who would then create a case in the system using a police report.



“We were trying to make our homegrown system fit our needs, but it was mostly manual.”

- VP of Technical Operations

Worse yet, looking for information meant rifling through old emails, which was tedious and time-consuming.



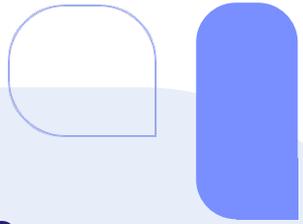
“Whenever we worked on a project or request, there were many manual steps required, and lots of back-and-forth email communications that were hard to track and manage,”

- The client said

Adding that a lack of mobile capabilities in the system made it difficult to follow up on cases after hours.

Automate, optimize, and integrate

To streamline and optimize the Service team's processes, automation was essential. Resolute tackled this challenge by breaking the work into three parts: optimizing support processes using Case Management in Salesforce, optimizing production and installation processes using Work Orders in Salesforce, and integrating key applications as widgets or plugins within the new interface.



Optimizing support processes using Case Management in Salesforce

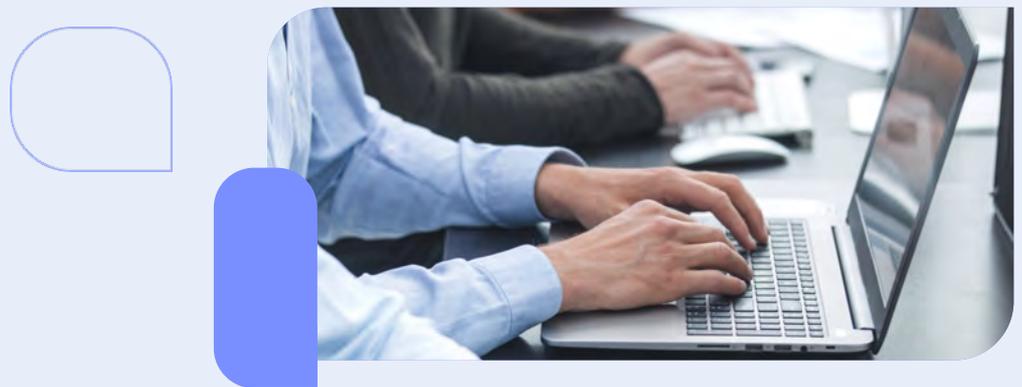
Resolute began by creating Case Workspace in Salesforce and customized the Service Console, to enable the client to access all of the details about a service case in one place.

Resolute customized data fields to correspond with the existing email templates and added activity buttons that enable users to log calls, schedule events and send emails with a single click. They can log in and see the activity feed and timeline in a single pane of glass. Information from Jira — including related issues and comments — is readily accessible, as well, so the Service team has all the information they need to make informed decisions faster. Additionally, the team can now access Salesforce's collaboration app, Chatter, on their mobile phones to facilitate more efficient, timely collaboration.

Optimizing production and installation processes using work orders in Salesforce

Resolute fully automated the process of submitting work orders by converting all of the email templates into Work Order templates in Salesforce. Based on Work Type selection, a different template with Work Order line items for different tasks is generated automatically.

Project managers can easily enter their information into the Work Order, eliminating error-prone and inefficient back-and-forth email communications.



Integrations with Jira, Zoom and Outlook

Resolute integrated key applications that further streamline and optimize the Service team's ability to work on tickets and work orders.

Working with third-party systems integrator Service Rocket, Resolute implemented an integration with Jira that provides a smooth hand-over of support tickets from the Service team to DevOps and enables the Service team to access development items directly in Salesforce. Service team members can track ticket resolution via Case Management, because the information from Jira automatically syncs with the Cases and Work Orders in Salesforce.



“Prior to the integration, we would create and track Service tickets in Jira, and when the work was finished, it would often just sit there. The implementation team would have to remember to go in and manually check the status.”

- VP of Technical Operations

She added that DevOps would run a report, because the query in Jira was complex, and the Service team would have to call the customer to let them know the issue was resolved.

Now, the client’s team can create new issues in Jira directly from the Case in Salesforce, or associate a new issue with an existing issue. Clicking on the Issue Number in Salesforce opens Jira automatically, and clicking on the Case association in Jira opens the Case in Salesforce. They can also create a Salesforce case from within Jira.

The integration allows the client to use Salesforce as a central place for not only creating Cases and Work Orders, but for associating all of the relevant information and activities in Jira with them. Everything is updated automatically, so there are far **fewer errors and much more efficient collaboration** with DevOps.

solution –

Resolute also integrated Zoom, enabling the Service team to make phone calls to clients directly from within Salesforce. A Zoom Phone widget on every page in Salesforce opens an embedded Zoom Dialer with search capability. Users can search by Client Name and click to dial.

Once the call is complete, another window pops open, reminding the user to log the call and enter notes. The Service team can also schedule an event or meeting directly from within Salesforce and insert the Zoom details and link into the invite. This information is synced with Outlook.

For the Outlook email and calendar integration, Resolute used the Lightning for Outlook plugin. When sending an email or scheduling an event with a client in Outlook, a Salesforce window opens containing all related records for that client — opportunities, Work Orders, and notes. Users can log emails, create new records, or modify existing ones without opening the full Salesforce application.

Finally, Resolute used Einstein Activity Capture, a productivity-boosting tool that syncs events between Salesforce and Outlook. The client's implementation teams can schedule meetings necessary for completing Work Order line items directly from the Work Order, and they reflect automatically on their Outlook calendar. In this way, Project Managers and the Executive team have a complete overview of the entire team's calendar.

Consolidated home page enables easy activity tracking

Resolute created a consolidated homepage, where users can view all of the open support cases, cases that are in the queue, and upcoming events and recent items. The home page features a Launchpad with one-click access to widgets for opening Cases, Work Orders and Accounts. Because it's role-based, users only see information relevant to their role and function.

The integrations make it easy for the client **to pull statistical reports, to track case resolution**. Prior to the integrations, they would have to pull this information from various sources manually, to build an activity report for a customer or share information with upper management. Now it's all accessible with a simple search.

As an essential component of the service provided, Resolute delivered training to the Service organization, to get them up to speed on how to best use the new integrated features and functionality in Salesforce.

Complete visibility across work in progress boosts efficiency, improves customer experience

As a result of Resolute's implementation work, the client's Service organization has gained visibility into the activities, status and progress of their work, while saving time and resources previously wasted on manual processes. In the coming months, Resolute will work with the client to implement a Document Management and eSignature solution, as well as a production management solution and project management solution inside Salesforce, enabling automatic customer notifications upon Work Order completion among other tasks. They'll also help to optimize the Sales Cloud implementation, and continue to refine and improve upon features and functionalities to fit the team's evolving needs.





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- Vice President of Technical Operations

Let's talk about your technology requirements.

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