

Exploring the Functionality of Omnichannel in Salesforce Service Cloud to Improve Agent Efficiency

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Abstract

Omnichannel in Salesforce Service Cloud revolutionizes how customer service agents manage multiple communication channels by providing a unified interface. In industries with diverse channels, agents face difficulties juggling between phone calls, emails, chats, and other contact methods, often leaving customers waiting for long periods. Omnichannel ensures better distribution of cases based on agent availability, skills, and workload, enabling faster response times and improved customer satisfaction. This paper explores Omnichannel's capabilities, the configurations needed for implementation, and how its integration with Knowledge Articles and other tools enhances agent efficiency. The paper also discusses key performance indicators (KPIs) to track success.

Keywords: Omnichannel, Salesforce, Service Cloud, Agent Efficiency, Case Assignment, Customer Service, CTI, Email-to-Case, KPIs, Knowledge Base

Introduction

In today's fast-paced digital environment, businesses must manage multiple customer service channels such as email, online chat, and phone. The challenge often arises when agents struggle to respond to cases across these channels efficiently, especially when workloads are unevenly distributed.

Salesforce Service Cloud offers **Omnichannel**, a feature that automatically routes cases, chats, and other requests to the most suitable agents based on availability, skills, and defined rules. This not only reduces customer wait times but also optimizes agent performance. Through Omnichannel, supervisors can track agent performance and make data-driven decisions, ensuring optimal staffing and resource allocation.

Problem Statement

Many companies face challenges in managing cases across multiple communication channels. For example, agents may be busy with phone calls when chat requests come in, resulting in delays. Similarly, some agents may be overloaded with work while others remain idle, causing inefficiencies in workload distribution.

Moreover, agents often have to manually search for solutions or articles within Salesforce, further increasing response times. Without a unified system, businesses cannot easily monitor agent performance across multiple channels, which affects decision-making regarding agent availability and staffing.

Solution

1. Omnichannel Configuration in Salesforce

Omnichannel helps companies overcome these issues by automatically routing cases to agents based on:

- **Availability:** Agents who are free are assigned new cases, ensuring even distribution.
- **Skills:** Assignments are based on agent-specific skills, ensuring that cases are handled by the most qualified individual.
- **Workload:** An agent's current workload is considered before assigning new cases, ensuring they are not overwhelmed.

Below is the architecture of how Omnichannel works:

- **Email-to-Case:** Cases created through email are queued and routed to available agents.
- **Chat-to-Case:** Incoming online chat requests are automatically assigned to free agents.
- **CTI (Phone-to-Case):** Calls routed through CTI are logged as cases and assigned based on availability and skill level.

The following steps outline the basic configuration changes to implement Omnichannel in Salesforce Service Cloud:

2. Configuration Changes in Salesforce

To set up Omnichannel, the following steps are required:

Step 1: Enable Omnichannel in Salesforce Service Cloud

- Navigate to **Setup** → Search for "Omnichannel" → Enable.

Step 2: Define Agent Skills and Routing Rules

- Create skill profiles for agents (e.g., technical support, billing support, etc.).
- Define routing rules that allocate cases based on skill and availability.

json

```
{
  "rules": [
    {
      "skill": "Technical Support",
      "availability": true,
      "currentLoad": 3,
      "maxCapacity": 5,
      "routeTo": "Agent A"
    },
    {
      "skill": "Billing Support",
      "availability": false,
      "routeTo": "Agent B"
    }
  ]
}
```

Step 3: Configure Presence Status

- Set up agent availability statuses such as **Available**, **Away**, and **Busy**, allowing Omnichannel to route cases only when agents are marked as "Available."

Step 4: Create Queues and Assign Skills

- Create queues for each type of service (e.g., **Technical Support**, **Customer Service**) and assign agents based on their skill sets.

Step 5: Integrate Knowledge Articles

- Link Knowledge Articles with Omnichannel so that agents are automatically presented with relevant content when handling a case.

Enhancing Efficiency with Knowledge Article Integration

One of the key challenges agents face is spending too much time searching for relevant information. By integrating **Knowledge Articles** into the Omnichannel flow, agents can instantly access the information they need.

When a case is routed, Omnichannel can pull keywords from the customer's inquiry to automatically display relevant articles in the agent's console, improving first-contact resolution rates and decreasing time-to-close.

MuleSoft Integration for Omnichannel (Optional)

To enhance the system's functionality, you could use **MuleSoft** to integrate Salesforce with other systems, such as external knowledge bases or CRMs. For example, if customer information resides in a separate database, MuleSoft can pull this data in real time to provide agents with comprehensive insights.

Here's a code snippet for MuleSoft flow to sync external data with Salesforce:

xml

```
<flow name="GetCustomerDataFromExternalSystem">
  <http:listener config-ref="HTTP_Listener" path="/getCustomerData" allowed-methods="GET"/>
  <db:select config-ref="Database_Config" doc:name="Retrieve Customer Data">
  <db:sql>SELECT * FROM Customer WHERE ID = :id</db:sql>
  </db:select>
  <set-payload value="#[payload]" />
  <salesforce:update-s-object config-ref="Salesforce_Config" type="Case" />
</flow>
```

Flow of Omnichannel

The below flow illustrates how Omnichannel assigns cases based on agent availability, skills, and workload:

- **Email-to-Case** → Queue → Omnichannel Routing → Agent
- **Chat-to-Case** → Queue → Omnichannel Routing → Agent
- **Phone-to-Case (CTI)** → Queue → Omnichannel Routing → Agent

Key Performance Indicators (KPIs)

To ensure that the Omnichannel implementation is successful, certain KPIs should be tracked:

- **First Contact Resolution (FCR)**: Measure the percentage of cases resolved without escalation. Higher FCR indicates that Omnichannel is successfully routing cases to the right agents.
- **Average Wait Time**: Track how long customers wait before being connected with an agent. A lower

wait time reflects efficient routing and better workload distribution.

- **Agent Utilization Rate:** Measure how effectively agents are being utilized. This metric tracks how busy agents are and helps identify if additional staffing is needed.
- **Case Resolution Time:** The time it takes to resolve a case from creation to closure. This KPI measures the overall efficiency of the case handling process.
- **Agent Satisfaction:** Survey agents to assess their satisfaction with the Omnichannel system, including how manageable their workloads are and how easily they can access knowledge articles.
- **Customer Satisfaction (CSAT):** Use customer feedback surveys to measure how satisfied customers are with the resolution of their cases. Faster case resolution and reduced wait times should positively affect CSAT scores.

Benefits of Omnichannel in Salesforce

1. **Improved Agent Efficiency:** By ensuring that cases are routed based on agent skills, availability, and workload, Omnichannel prevents overload and ensures that customer issues are addressed promptly.
2. **Better Customer Satisfaction:** Customers no longer have to wait long periods for service, as cases are routed to the most suitable agent.
3. **Optimized Resource Allocation:** Supervisors can easily monitor agent workloads and adjust resources based on demand.
4. **Integration with Knowledge Articles:** Agents are presented with relevant articles automatically, reducing the time spent searching for solutions and improving first-contact resolution.
5. **Scalability:** As the business grows, Omnichannel can scale by adjusting routing rules, adding more queues, and configuring additional agent skills.

Conclusion

Salesforce Omnichannel offers a robust solution to the challenges faced by customer service teams in managing multiple communication channels. By automatically routing cases based on skills, availability, and workload, Omnichannel ensures that customer issues are resolved more quickly and efficiently. Additionally, integration with Knowledge Articles and other Salesforce features enhances agent productivity. With the right configuration and continuous monitoring using KPIs, businesses can significantly improve both agent efficiency and customer satisfaction.

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