TECH mahindra

CASE STUDY

Transforming Agent Experiences and Efficiency using Salesforce Einstein AI

Overview

With the growing need for tailored and rapid service, enhancing operational efficiency and customer experience has become a critical priority for the financial services industry. Our client, a leading global financial services firm, recently partnered with Tech Mahindra to enhance their service cloud using Salesforce's Einstein AI. This implementation aimed to address operational inefficiencies, improve case management, and elevate customer service quality for the client's customers. Our implementation led to a 20% to 40% reduction in case resolution time and a nearly 30% increase in agent productivity.

Client Background and Challenge

The client, a leading global financial services corporation, faced several operational challenges affecting efficiency and customer service quality. On average, 4,000 cases were created or updated daily, with 80% arriving over email in raw format. This required assistance for classification and assignment, leading to the following challenges:

- **High Case Age and Client Wait Time:** The manual routing and processing led to high case age and increawaiting longer for updates. Additionally, this manual handling sometimes caused cases to be closed with incorrect articles, further increasing customer dissatisfaction.

- **Data Inaccuracy and Time-Consuming Routing Process:** Accurate data classification for billing and sed customer wait times. Cases often remained in the queue for extended periods, resulting in clients case routing posed a problem. This led to inefficiencies and potential errors in customer service processes.

- **Agent Performance:** There was a need to improve the performance and accuracy of customer service agents to meet the growing demands of global operations.

Our Approach and Solution

To address the client's operational challenges, Tech Mahindra implemented the following Salesforce's Einstein AI modules within six months in the client's service cloud:

Case Classification: This feature ensured higher accuracy of case routing and billing by automatically populating essential fields such as product classification and required skills. It ensured the cases were directed to the appropriate agents automatically.

Next Best Actions: By providing agents with strategic recommendations for actions on cases, this tool facilitated more informed and effective decision-making, enhancing overall case handling.

Reply Recommendations: Agents received AI-driven suggestions for chat responses, enabling them to resolve cases more quickly and efficiently, thereby improving customer service responsiveness.

Article Recommendation: This feature automated the creation of suggestion records, reducing the manual workload for business users and ensuring that relevant information was easily accessible.

Business and Community Impact

Reduced Case Age: With instant assignment of cases (which previously took 2 days) and other agent support solutions the average case resolution time was reduced by 20% to 40% across all categories of cases.

Improved Agent Productivity: With automatic data entry population and AI-driven recommendations, agents could handle cases more efficiently and accurately. This minimized manual data entry, enabling agents to focus on resolving more cases, and increasing their productivity by almost 30%.

Scalability: Building on the success of these solutions, the client is in the process of implementing additional modules such as the Einstein Bot, Conversation Mining, and Case Wrap-up. These enhancements aim to further improve customer service and agent efficiency, demonstrating the solution's ability to scale and integrate new functionalities seamlessly.

About Tech Mahindra

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