



Transforming the tech industry contact center

Deliver intelligent case swarming with Slack, Salesforce Service Cloud and IBM Consulting



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Today's tech support journey is full of friction

Did you know that 83% of customers expect to solve technical issues by talking to one person from a tech company?¹



Or that 79% of service professionals say providing great service is only possible with full customer context?²

Yet service cases are more complex than ever, making it difficult to meet these customer and service agent expectations. Agents struggle to collaborate across technical teams, access internal experts and ramp up new employees. Disconnected tools, teams and workflows contribute to more ticket backlogs and a reduction in customer satisfaction (CSAT) scores.

What effect does this have on someone needing support? Consider this fictional story: Customer Alina has called tech support because of an “Unknown error” message she received when trying to synchronize calendars in scheduling automation software. A chatbot on the scheduling software company’s website told her she would have to call support.

Agent Julius comes on the line after a 10-minute wait. Because he can only troubleshoot if he has an error code, he asks Alina to provide it. When Alina replies that there isn’t one, Julius needs Tier 2 support to help. Time to escalate. He puts Alina on hold while he looks for a technician. Meanwhile, Alina can’t synchronize calendars so that client appointments are visible to all stakeholders. She’s frustrated.

Eventually her issue is resolved, but only after Alina has:

- Repeated the error to multiple agents and specialists
- Waited for several technicians to get in touch
- Tested solutions that didn’t solve the issue
- Wasted a lot of time on the phone and in emails

As Alina’s experience ripples through the software company’s customer base, retention rate is affected. Ticket resolution and other KPIs aren’t met.

In this e-book, we explore how [Slack](#), [Salesforce Service Cloud](#) and [IBM Consulting™](#) are transforming the tech industry’s contact centers to address these and other tech support challenges.



Case swarming: Collaboration instead of escalation

Now consider a better scenario than the first. Customer Alina calls to report that the unknown error during calendar synchronization is preventing the process from running. When the agent, Julius, can't solve the problem because there's no error code:

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He gathers a team of experts in a dedicated Slack channel for collaboration, including one of the solution's software developers.

They work with Julius to go through the code or configuration to reach a resolution.

Julius is Alina's point of contact the whole time, and she's relieved she isn't passed from agent to agent.

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This is an example of swarming, which manually or automatically opens a central Slack channel for communicating, collaborating, sharing knowledge and solving around a customer request, need or issue. Anyone in any line of business, such as HR, sales and operations, in any industry can benefit from swarming.

Alina's story is about using swarming for customer technical support. Known as **case swarming**, it enables agents to tap the expertise of IT, developers and others so they can work together to solve complex problems as soon as they arise. Customers no longer move from one technician to another. Agents and technical specialists share background knowledge and resources with one other to help solve the case collaboratively.

For swarming and case swarming to deliver the best results, you need a centralized, data-driven, AI-powered contact center platform supported by the right technology. In the tech industry, this platform needs to solve often highly complex challenges such as debugging and code review. This is called intelligent case swarming, and it uses AI, cognitive analytics and more to help tech company contact centers with their unique support needs.

IBM Consulting, a Slack-certified consulting partner, has built an intelligent case swarming solution that leverages the technologies your agents rely on to get work done. Before we get into the specifics of the solution, let's look at how this could work at your company.

Intelligent case swarming for the tech industry

Intelligent case swarming enables a tech support agent and other experts across IT to communicate, collaborate and resolve cases efficiently in real time, whether external or internal, offshore or onshore.

The foundation of the solution is **Slack**, which connects humans and systems through a centralized productivity platform. Slack integrates with **Service Cloud** and other technologies to give agents a holistic view of a customer's journey through the support process, whether the agent is in a contact center or working remotely. **Slack channels** break down silos between support and tech experts. **Huddles**, **clips** and **the ability to schedule messages** offer flexible ways to communicate for the swarming team. **Workflow Builder** and **Block Kit** automate the team's workflows.

To help you get a better idea of how this intelligent case swarming solution works, let's go back to the story of Julius and Alina, and add a self-service portal that uses Service Cloud and Slack technology. When Alina engages with Julius, customer relationship management analytics provides Julius with a view of Alina's journey so far. When Julius can't resolve Alina's problem, he gathers a team to help with the issue by selecting a swarming action through the **Service Cloud for Slack integration**.

Thanks to the collaborative and real-time swarm, Alina experiences very little wait time, and she is delighted that one agent is with her the whole way. The intelligent swarming technology is transcribing everything in real time. This transcription can be added to a searchable, context-rich repository for future reference.

This is just an overview of one scenario. Let's drill down further to see how intelligent case swarming benefits tech support agents, using **IBM** as an example.

How intelligent case swarming benefits tech support agents at IBM

And how your tech company can take advantage of it

When IBM began using intelligent case swarming, it did not take long for agents to see the benefits.



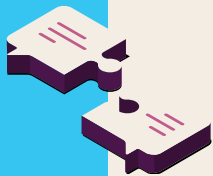
Faster resolution, easier access to information

The benefit IBM agents most easily recognized was how much faster issues were resolved because the process all happens in real time. AI and automation enable agents to connect quicker with SMEs in context of the customer issue and easily add the resolution to their knowledge base.



Improved agent satisfaction and productivity

Because they own the case to resolution and collaborate live with specialists, agents feel more productive. They are also upleveling their skills and knowledge as a result of having visibility into the resolution, as opposed to escalating, where they pass off the issue and then miss how to resolve it. Same-day resolution can increase while case backlogs decrease. Frustration is replaced with a sense of satisfaction fueled by the positive effects of collaboration. Leadership can monitor real-time performance on swarm cases, recognizing high-performing agents and teams, and helping others improve.



Extending these benefits to your tech company

Your agents can really see a boost in productivity if they have the ability to work with others outside your organization when [Slack Connect](#) is part of your intelligent case swarming implementation. Often customer issues can be related to your software's or technology's dependency on applications, connectors or integrations from your partners. In those cases, your agents can use Slack Connect to bring in experts from those partners to help with a resolution. With Slack Connect, you can also invite the customer into the conversation and share error messages and screens on the spot.



The value of intelligent swarming also extends beyond technical support to IBM's business. The following chapter shows you how.

The business value of intelligent case swarming at IBM

And how your tech company can realize similar benefits

IBM's implementation made a significant positive impact on customers and internal KPIs.



Increased customer satisfaction

With intelligent case swarming, IBM customers who experienced little to no friction or wait times when they contacted tech support were more satisfied. IBM says that positive engagement and swift resolution might even prompt it to increase its spend on premium support, upgrades or add-ons. In fact, a report from the Technology and Services Industry Association found that companies using collaborative case swarming had 5.4% higher contract renewal rates.³ And when it used intelligent swarming to resolve cases, in just three months IBM experienced 15% faster time to initial resolution. The company expects this number to go up as more employees get trained on swarming.



Meeting and exceeding KPIs

IBM reports many internal business benefits as well. An intelligent case swarming solution can contribute to meeting KPIs for resolution time, CSAT and the time saved per agent. Customer retention and customer lifetime value numbers are likely to grow too.



How intelligent case swarming can benefit your business

Like IBM, your operations, customer satisfaction and retention, and business processes can also improve. Agents can communicate with experts and tap into an expanded knowledge base and rich case history repository to ramp up faster. Aligning cross-functional teams in Slack channels not only reduces escalation, but it also breaks up siloed groups. Real-time agent performance insights turn pain points into coaching opportunities. Each of these improvements has the potential to prevent high agent attrition rates, which reduces the cost of recruiting new hires to replace those who leave.

Other benefits that reduce costs:

- Eliminating repetitive tasks through automation saves time and money.
- Instant insights into agent performance can identify problem areas, keeping efficiency and productivity high and costs low.
- The collaborative approach to solving issues can lead to product enhancements, improve DevOps and catch problems in code or design before they cause downtime.
- Agents uplevel knowledge quicker as they see a customer ticket from start to finish, as opposed to escalating.



To capitalize on these business benefits, you need an experienced partner that not only uses intelligent case swarming but also contributes to the technology involved.

IBM understands how to use Slack to implement intelligent case swarming

IBM Consulting is an ideal partner for supporting intelligent case swarming with Slack and Service Cloud. IBM's own support agents use Slack swarming capabilities to automatically pull in SMEs to support Service Cloud cases when they do not have the required knowledge. IBM has connected Salesforce clouds, support teams and resolution workflows to eliminate data and people silos, accelerating time to initial resolution.

IBM Consulting realizes that it takes more than technology adoption to transform business processes; your people need to be enabled to change their behaviors and understand why. Its talent transformation and behavior change experts can help accelerate your digital transformation with a people-centric approach.

IBM's story, lessons learned, best practices and Slack expertise can help your technology company provide better and faster tech support. It has executed the largest, most complex Salesforce Customer 360 and Slack implementations, which are currently supporting over 200,000 employees.



Examples of IBM Consulting's leading-edge design accelerators, custom bots, automation workflows, methods, pre-built industry assets and cognitive transformations that support intelligent case swarming include:

- An IT help desk bot powered by IBM Watson[®]
- Predictions of the skill level needed to solve an issue and routing provided by IBM Watson AI and natural language processing (NLP)
- IBM Watson virtual assistants that streamline communication between agents from different departments
- IBM Watson Tone Analyzer to detect case complexity and recommendations for which support team to loop in
- Slack and Service Cloud accelerators that open swarms directly in Slack

By weaving this technology with that of Slack and Salesforce Service Cloud, IBM Consulting can create a customized intelligent swarming solution that helps you solve customer issues rapidly by collaborating, not escalating.

Intelligent case swarming with Slack, Service Cloud and IBM Consulting:

A possible 5-star scenario

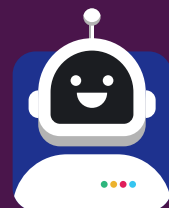


To demonstrate the difference that intelligent swarming from Slack, Service Cloud and IBM Consulting can make to your tech company's IT support center, let's add more details to the Alina (customer) and Julius (agent) story.



After Alina experiences the unknown error:

- She visits your website and engages in a conversation with a bot powered by IBM Watson Chatbot and integrated with Salesforce Service Cloud Voice.
- The bot recognizes that Alina's issue requires interaction with an agent and routes her to Julius—or offers to bring her in on a call.
- Julius already has the history of Alina's chat and any other applicable insights about her case or customer history via Tableau.
- Because Alina has no error code, Julius knows he can't help her by himself.
- Throughout the conversation, IBM Watson AI and NLP technology have been monitoring the discussion. Watson AI assigns a skill level to the issue and identifies experts who can help Julius.



Julius opens a swarm with the experts, and the troubleshooting begins:



A connector to a partner's calendaring app appears to be the issue, but they need screenshots.

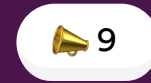
Using Slack Connect, Julius invites Alina into an external swarm. After reviewing her images, they realize that the problem is on the partner's end.

The partner is brought into the swarm, everyone shares knowledge and the connector issue is resolved with some coding work.

At the end of the support session, Alina gives Julius five stars when she is automatically asked to rate her service. She also informs her management that purchasing more of your premium licenses will be beneficial.

Although this scenario is fictional, the descriptions of the integrations are not. They are well within the realm of possibility, and they could alter tech support dramatically in the near future.





Explore swarming for your organization

IBM Consulting understands the path to value with Slack and Salesforce Service Cloud, and how to implement these technologies at scale. In fact, it can help you use intelligent swarming beyond tech support to improve ticketing and overall customer service, reduce incidents, and so much more.

Dive in to learn more:

- [Slack for customer service teams](#)
- [Extend the power of Service Cloud to Slack](#)
- [Slack for tech companies](#)
- [Slack and Salesforce consulting services from IBM Consulting](#)
- [The journey to modernizing your service operations](#)
- [IBM's own transformation with Slack and Salesforce](#)

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