

SPRINKLR SALESFORCE INTEGRATION

Linking social to CRM contacts and cases

THE PROBLEM

CRM systems, like Salesforce, contain a great deal of critical data ranging from customer profiles, customer support cases, and sales opportunities - all of which drive business results. Many companies use Salesforce, for example, for case management to centrally manage customer support inquiries. However, many customers express their support issues via social media, which requires immediate customer engagement. If Salesforce case and profile information are not available at the point of these conversations, inefficiencies arise and customer relationships suffer. CRM data is simply not as useful when siloed from customer interactions.

THE SOLUTION

An integration between Sprinklr and Salesforce enriches social data with business context. Sprinklr companies are able to create Salesforce cases, associate cases, and create contacts or accounts - all within the Sprinklr platform. This enables teams to manage support and contact management in the same place they engage in customer conversations. Since Sprinklr users can also leverage unified profiles within the platform, **customers receive more personalized responses and faster resolutions.**

"Enrich social data with
a business context"



CONTACT, ACCOUNT, AND LEAD CREATION FOR CUSTOMER PROFILE MANAGEMENT

Moderation teams can expedite and personalize interactions with the right customers. Upon identifying key customers, such as influencers advocating for the brand, or detractors raising a support issue; users can add them as Salesforce contacts or accounts within Sprinklr. Alternatively, users can link a customer profile with a contact, account, or lead, already present in Salesforce to prevent duplication.

CASE CREATION AND MANAGEMENT FOR CUSTOMER CARE

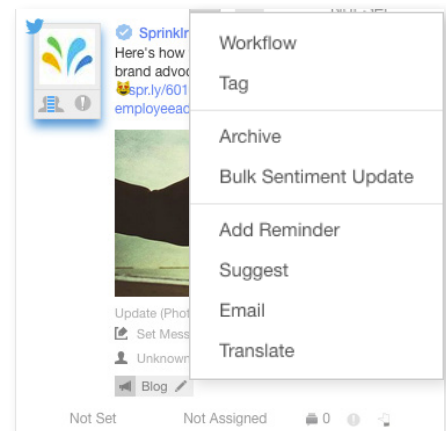
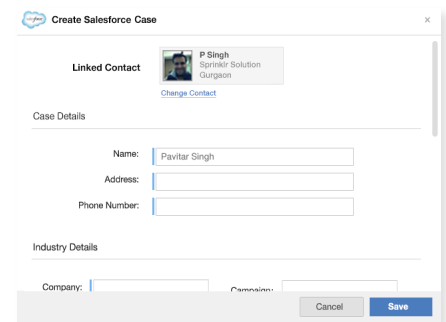
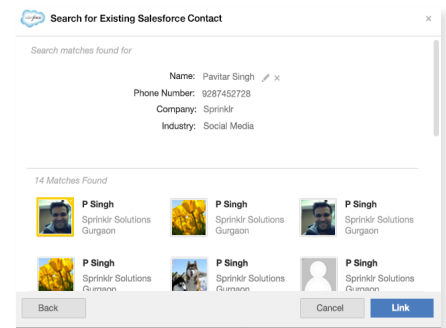
Customer support issues can be centrally managed with Salesforce but become closer to the customer conversations within Sprinklr. Users have immediate visibility to the progression and status changes of cases, and the opportunity to make updates along the way. This is accomplished by users creating a new Salesforce case when a support case surfaces on social media, or by linking to an existing Salesforce case.

CONVERSATION MANAGEMENT FOR MODERATION

Sprinklr's integrated Case Management capabilities give brands a way to easily assign, track, and understand conversations. Unified social profiles and threaded conversations allow for greater context, adding depth and a greater level of personalization to every interaction. With Case Management, teams create "cases" to compile related conversations into a single view. Monitoring dashboards help prioritize, understand, and route open cases. Community managers then leverage profile and/or associated case information when replying. The response will then reflect the prior message history, case status, and profile information from Salesforce (such as email address and mailing address) combined with data from Sprinklr (such as social network user name and number of followers, etc.) for greater accuracy and personalization.

Sprinklr offers these benefits with its Salesforce integration today. Additionally, Sprinklr can go beyond the existing integration and provide custom development to support expanded or unique use cases for utilizing Salesforce.

The following case study shows how a global consumer packaged goods (CPG) company utilized Sprinklr's custom development team to integrate Salesforce into their optimized customer care process.



CASE STUDY

SALESFORCE

How a global consumer packaged goods (CPG) company uses Sprinklr with SFDC to build customer relationships and improve experiences.

THE PROBLEM

A large CPG company had a sophisticated challenge in front of them: align a global organization currently operating in silos across multiple business functions spanning hundreds of brands and thousands of individuals with a single social system of record. It would need to integrate with existing legacy systems and enable their teams to better manage consumer experiences.

Traditionally, each brand within the CPG conglomerate operated within its own silo as it related to social media; separate from the other brands and separate from Customer Care.

When a message was directed at the brand that required the attention of Customer Care, the Community Managers would direct the consumer to call an 800-number. This is because there was no mechanism to move the messages easily across the organization to the Customer Care team. In addition, it was important that all customer service inquiries were logged in their customer care system of record, Salesforce, against a specific consumer.

For a brand looking to manage each experience with a consumer, internal reports showed that 80% of messages directed at the brand were customer service-related issues. Upon being directed to an 800-number, less than 20% actually called the number. This left a large number of less than satisfied consumers.

Servicing consumers quickly, meaningfully, and directly (most often via social media) is critical to the consumer's experience. Furthermore, there is significant cost reduction by interacting with consumers on social channels versus a phone call or email.



"There was no mechanism to move the messages easily across the organization to the Customer Care team"

THE SOLUTION

In order for the CPG's Customer Care reps to effectively engage on social media, it was important that they tie their interactions back to a specific user and append data to the customer profile.

Sprinklr's integration with Salesforce started with identifying the taxonomy and fields to be passed from Sprinklr to Salesforce. Enabling a 360 degree profile of the consumer.

Research showed that nearly all of the Direct Messages and Wall Posts for each of the CPG's brands were Customer Care-related issues. Sprinklr's rules engine automatically routed these support posts to the 200+ person Customer Care team. These agents picked up each message quickly and after a Customer Care agent interacted with a consumer, the agent would search the Salesforce instance (in Sprinklr) based on the unique identifiers they captured. Data points were then appended to the customer record, enabling a social system of record that provided a universal profile of the customer within the Salesforce instance.

For example, Customer Care agents monitored their social channels for messages, interacted, and engaged directly with consumers. As part of the resolution process, Customer Care agents offered coupons to the consumer following a service issue. This coupon acceptance data was appended to the customer record for future tracking and data mining.

THE RESULT

The CPG was able to positively impact customer interactions and issue resolution. Additionally efficiencies were gained across each brand:

- Reduction in cost to service the customer (social media vs phone/email)
- 360 degree view of the customer – personalizing messages across teams, incorporating social media data into the record, then mining data to target effectively
- Efficiency for Community Managers to spend more time on engagement

Sprinklr's comprehensive platform, with best of breed capabilities, enabled the CPG's portfolio of brands, global regions and functional organizations to break down silos and facilitate communication across the organization. This CPG could better manage delightful experiences and stronger relationships with their consumers.



Note: Sprinklr integrations are provided in compliance with social network and data provider terms of service.

As such, some data may not be transferred. Please speak with your Sprinklr representative for details.

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