



# Assess Business Process Maturity for Salesforce Services Cloud

## Get an Action Plan to meet your Business Goals

In today's experience economy, traditional contact centers are focused on transforming to elevate the customer & agent experiences and drive efficiency. Many service leaders are using Salesforce Service cloud capabilities to some extent or are migrating to it. They often struggle to maximize the utilization of service cloud capabilities and drive higher ROI as they fail to optimize the license and usage costs as well as use Salesforce to its full potential.

Service and technology leaders need to assess the maturity of their service-cloud based contact center to understand the areas of improvement and optimization, and how to mature it to the next level.

### Use Our Business Process Maturity Assessment Framework

Movate based on its 18+ years of experience in customer experience management has compiled best practices and created a Business Maturity Assessment Framework for Contact Centers. We use this Framework to assess the various Business Processes objectively across the key User Personas.

## Objectives of Business Process Maturity Assessment

**Movate's business process maturity assessment for service cloud will help you**

- Optimize Salesforce service cloud-based contact center with our objective assessment.
- Elevate your contact center maturity & performance around key areas Agent Experience, Customer Experience, Omni-Channel Support, Self Service Enablement, Intelligent Automation Service Revenue, and Dashboards, KPIs and Reporting
- Get contextual insights and a clear roadmap to achieve business objectives:
  - Improved Customer Experience with enhanced NPS & CSATs
  - Improved Agent Experience with enhanced productivity
  - Improved Revenues & Optimized Costs with enhanced automation & feature adoption

### Create a Business Value Map

Identify your business Goals and KPIs to measure the success

### Align Business Goals/Process with Salesforce Features

Assess which of the Service Cloud features are used and which needs to be used to align with the Business Goals & Processes



### Create a Roadmap for Success

Action plan to achieve Business Goals & maximum ROI from your Salesforce Investment

### Assess The Business Processes Implemented In Salesforce

Identify processes that need to be updated, moved away or introduce new service-oriented ones

## Business Process Assessment Areas



### AGENT EXPERIENCE

Case Management | Agent 360 | Customer 360  
Telephony Integration | Workflow Automation  
Knowledge Base Creation and Sharing



### SERVICE REVENUE

Return Materials Authorization (RMA)  
Asset Management | Warranty Management  
Workflow & Automation



### CUSTOMER EXPERIENCE

Customer Feedback & Surveys  
Customer Retention & Loyalty  
Self Service Enablement



### DASHBOARDS, KPIS AND REPORTING

Persona-based Dashboard | KPIs  
Service Level Contracts



### OMNI-CHANNEL SUPPORT

Customer Service Channels | Support Routing  
Supervisor Console | Support Availability



### SELF SERVICE ENABLEMENT

Customer Service Incident  
Management



### INTELLIGENT AUTOMATION

AI Based Automations

### Targeted User Journeys

Customer Journey | Agent Journey | Supervisor Journey | Leadership Journey

## Maturity Level Assessment of Existing Business Processes

### Improve Maturity of Salesforce Service Cloud Implementation

Movate assessment framework categorizes & defines Service Business Process under four maturity levels – Basic, Emerging, Practicing and Leading. Assessment will be carried out against the business process and how it stacks up with Salesforce Service Cloud features and its implementation.

### Maturity Levels

#### Basic



- ✖ Poor Agent Experience
- ✖ Poor Customer Experience
- ✖ Omni channel Support is not available
- ✖ Service Process KPIs like NPS, CSAT not monitored
- ✖ Process extremely manual
- ✖ Self-service does not exist
- ✖ Intelligent Automation does not exist
- ✖ Low Service Revenue

#### Emerging



- ✖ Agent Experience is moderate
- ✖ Omni channel Support is available but error prone
- ✖ Service Process KPIs like NPS, CSAT monitored at minimal level
- ✖ Basic Self-service, still highly dependent on Agents
- ✖ Intelligent Automation does not exist; Reactive Process
- ✖ Medium Service Revenue

#### Practicing



- ✖ Agent Experience is great
- ✖ Omni channel Support is available
- ✖ Well Defined Insight led Services
- ✖ Standard monitoring of Service Process KPIs like NPS, CSAT
- ✖ Self-service exists
- ✖ Proactive Problem Management
- ✖ Intelligent Automation exists

#### Leading



- ✖ Agent Experience is Optimal
- ✖ Omni channel Support is available with Smart Routing
- ✖ KPIs driven process improvement and decision making
- ✖ Self-service exists that has shown significant reduction in ticket creation
- ✖ Intelligent Automation exists with AI related tools
- ✖ All the Service Process are leveraged through the features of Service cloud

#### Ad Hoc and Decentralized

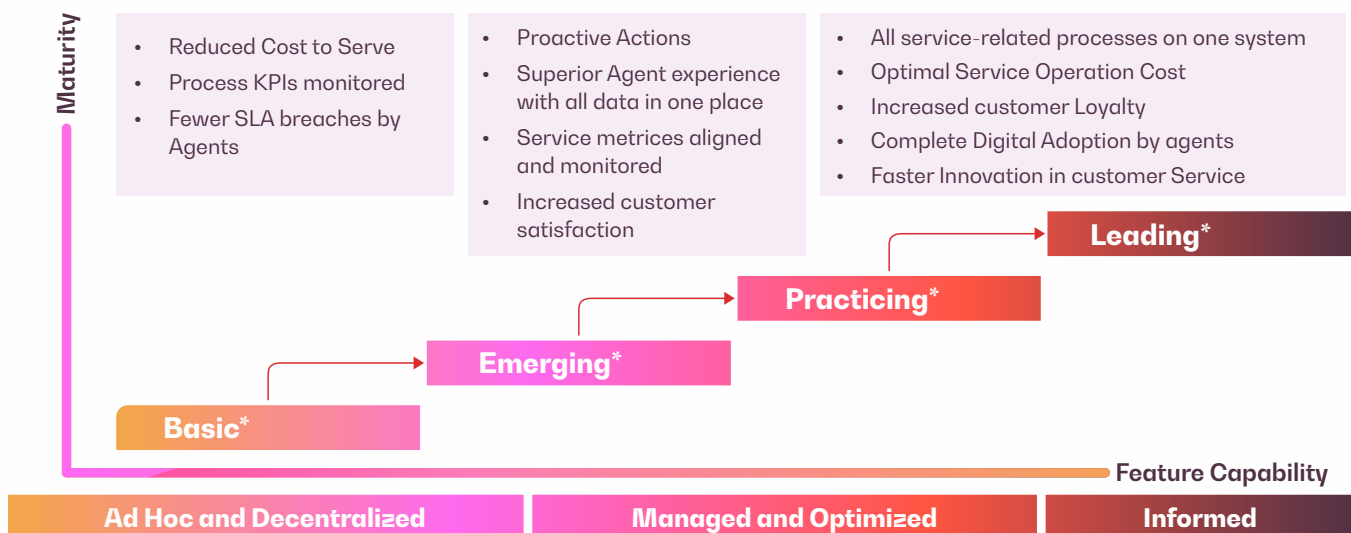
#### Managed and Optimized

#### Informed

## Business Value @ Different Maturity Levels

You can achieve incremental business value as you mature to the next level on business process and service cloud capability implementation across the enterprise.

### Snapshot of Business Value by Maturity level



\* The Maturity levels have been designed and aligned basis Industry & Salesforce standards.

### High level Business Value

Understand if the current implementation is aligned with <b>Business Goals</b>	Get an <b>objective categorization</b> of the Service Processes' implementation based on industry and Salesforce Service Cloud best practices	<b>Identify Gaps</b> between Business Goals and implemented processes and recommendations using service cloud features
Make <b>better investment decision</b>	Clear Understanding of how to <b>move to the next level</b> of maturity	Define a clear <b>roadmap of achieving the next level</b> and <b>maximizing ROI</b> from bringing in the relevant Service Cloud features
		Create <b>shared vision</b> of "future state" in organization

## Our Business Process Maturity Assessment

### Collaborative Approach to Improve the Maturity of Service Cloud

Our certified Salesforce Service Cloud consultants will collaborate with your key stakeholders to conduct an assessment for three weeks or more depending on the complexity of the organization.

	WEEK 1	WEEK 2	WEEK 3	WEEK 4
STEPS	<b>Kick-off &amp; Workshops to Understand Current Business Process</b>	<b>Salesforce Service Cloud Ecosystem Assessment</b>	<b>Analysis &amp; Documentation</b>	<b>Final Assessment Report Review &amp; Sign off from Client</b>
ACTIVITIES	<ul style="list-style-type: none"> <li>Kick-off and Executive Vision Setting</li> <li>Identification of key stakeholders &amp; schedule sessions</li> <li>Understand current challenges faced by Business &amp; IT</li> <li>Understand the service processes implemented on Service Cloud</li> <li>Understand the technical process supporting the business process in Service Cloud</li> </ul>	<ul style="list-style-type: none"> <li>Review the production instance for Salesforce</li> <li>Review the available technical &amp; functional documents</li> <li>Review the system architecture</li> <li>Align discussion &amp; review meetings stakeholders</li> <li>Assess using business maturity framework the technical features of Salesforce and how well features are implemented and adopted</li> </ul>	<ul style="list-style-type: none"> <li>Analyze pain points, gaps &amp; document the observations and current state of the Org.</li> <li>Document Strengths, Gaps &amp; Improvements areas</li> <li>Build an assessment report &amp; interim plan with recommendations on maturity improvement, process improvement &amp; feature utilization</li> </ul>	<ul style="list-style-type: none"> <li>Build an assessment report &amp; interim plan with               <ul style="list-style-type: none"> <li>Recommendations</li> <li>Maturity improvement</li> <li>Process improvement</li> <li>Feature utilization</li> </ul> </li> <li>Readout of the assessment report to the stakeholders</li> <li>Validate, align with Stakeholder &amp; sign off</li> </ul>
TEAM	1 Salesforce Technical Architect & 1 Functional Consultant			



## Illustrative Deliverables

You will get an assessment report with a clear understanding of how your current Service Cloud implementation holds against your business needs, industry and technology best practice, and the current maturity level as per the maturity framework..

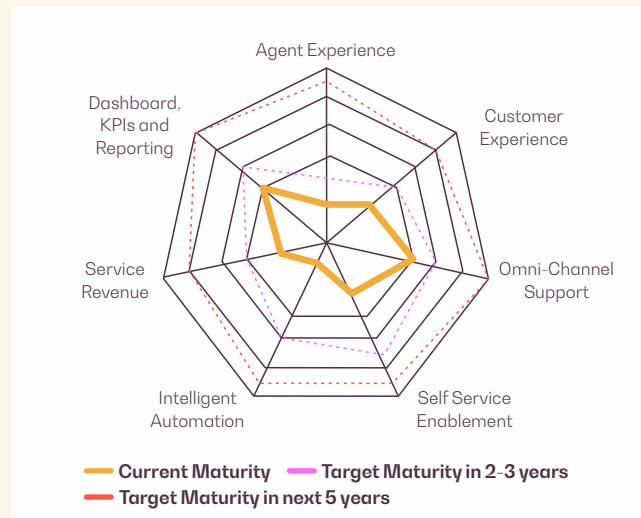
### The assessment report

#### EVALUATES -

- ✦ **Strength – Weakness – Gaps in the current implementations**
- ✦ **Process that are high effort and error prone**
- ✦ **Automation scope and Optimization possibilities in business capabilities and industry best practices**

#### RECOMMENDS -

- ✦ **Maturity ranking improvement activities**
- ✦ **Process improvement plan**
- ✦ **Features to be better utilized/adopted**
- ✦ **High level roadmap plan of the recommendations**



Reach out to us to schedule an assessment

## About Movate

Movate, formerly CSS Corp, is a digital technology and customer experience services company committed to disrupting the industry with boundless agility, human-centered innovation, and relentless focus on driving client outcomes. It helps ambitious, growth-oriented companies across industries stay ahead of the curve by leveraging its diverse talent of over 11,000+ full-time Movators across 20 global locations and a gig network of thousands of technology experts across 60 countries, speaking over 100 languages. Movate has emerged as one of the most awarded and analyst-accredited companies in its revenue range.