

Boost Service Productivity with the Salesforce Console

August 23 2016

The Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters inside it, is positioned in the bottom right corner of the slide.

salesforce

First, some logistics

Questions, answers, and staying in touch.

- How do you ask a question?
Please ask in the Success with Service Cloud Group and use the hashtag **#SalesforceConsoleLIVE**
- Will this be recorded?
Yes!
- Where can you get the presentation?
See the chat widget.
- Where can you go to get more information?
Use the **Success with the Service Cloud** group
<http://bit.ly/ServiceSuccess>

Post your question right here and use the hashtag **#SalesforceConsoleLIVE**



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Today's Speakers



Elio Camey
Principal Success Specialist



Maria Castillo-Jones
Senior Principal Success Specialist

Salesforce Console

Agenda

Overview of the Salesforce Console for Service Cloud

How the Console can fundamentally transform the way you manage Cases

Demo:

- ✓ How easy it is to set up the Console using clicks not code (LIVE Demo)

Audience:

Administrators, Salesforce project managers, data stewards, data architects

A black and white photograph of a man in a suit and tie, looking upwards and to the left with a confused expression. His right hand is raised to his forehead. A thought bubble is positioned above his head on the right side of the image.

What exactly is
the Console?

Case Detail Page View

Characteristics

- Serial user experience
- History in multiple places
- Related information in multiple places
- Actions in multiple places

Customer Service Impact

- Low agent productivity (more clicks)
- Suboptimal customer experience
- More searching/scrolling
- Customization

Case Detail

EditDeleteClose CaseClone

Description Information

Subject

Installation Issue

Description

I'm having issues installing my VX8 Monitor. Can you please send me the installation guide and any tips?

Question

Case Information

Case Owner

Tier 3 Queue [\[Change\]](#)

Case Number

00001626 [\[View Hierarchy\]](#)

Parent Case

Case Origin

Email

KB Article Attached

☐

Account Name

Advanced Interconnections Corp

Contact Name

Mark Metz

Source

Indicator

Status

Waiting on customer

Priority

Medium

Contact Phone

(747) 555-0100

Contact Email

markmetz@example.com

Case Tracking

First Call Response Time (mins)

Business Hours

24x7

DateTime Opened

7/23/2014 11:57 AM

DateTime Closed

Entitlement Information

System Information

EditDeleteClose CaseClone

Case Milestones

Case Milestones Help

No records to display

Articles

Find Articles

Articles Help

Action

Article Title

Modified Date

Created By

Summary

Detach

Headphone Troubleshooting

6/2/2014

Ryan Vaughn

Basic Maintenance and Troubleshooting for your Headphones

Open Activities

New TaskNew Event

Open Activities Help

No records to display

Activity History

Log a CallMail MergeSend an EmailView All

Activity History Help

Action

Subject

Name

Task

Due Date

Assigned To

Last Modified Date/Time

Edit | Del | Make Public

Email: Your Case #00001626 Has Been Closed

Mark Metz

✓

7/24/2014

Ryan Vaughn

7/24/2014 10:23 AM

Edit | Del | Make Public

Email: Proposed Answer for Case: 00001626 [ref: 00Do0Hst_ 500o015exs:ref]

Mark Metz

✓

7/24/2014

Ryan Vaughn

7/24/2014 10:15 AM

Edit | Del | Make Public

Email: Your Case #00001626 Has Been Closed [ref: 00Do0Hst_ 500o015exs:ref]

Mark Metz

✓

7/24/2014

Ryan Vaughn

7/24/2014 9:41 AM

Emails

Send an Email

Emails Help

Action

Status

Subject

Email Address

Message Date

Reply | To All | Del

Sent

Your Case #00001626 Has Been Closed

markmetz@example.com

7/24/2014 10:23 AM

Dear Mark Metz, Thank you for contacting Tex Industries. Since you've ind...

Why Console?

- Contact center environment
- Multi-channel support
- Scalable | Gamification
- Agent focused
- Optimized for speed and clarity
- Because the cool kids are using it!

Service Cloud Console

Modern, Feed-First User Experience

Collaborative User Experience

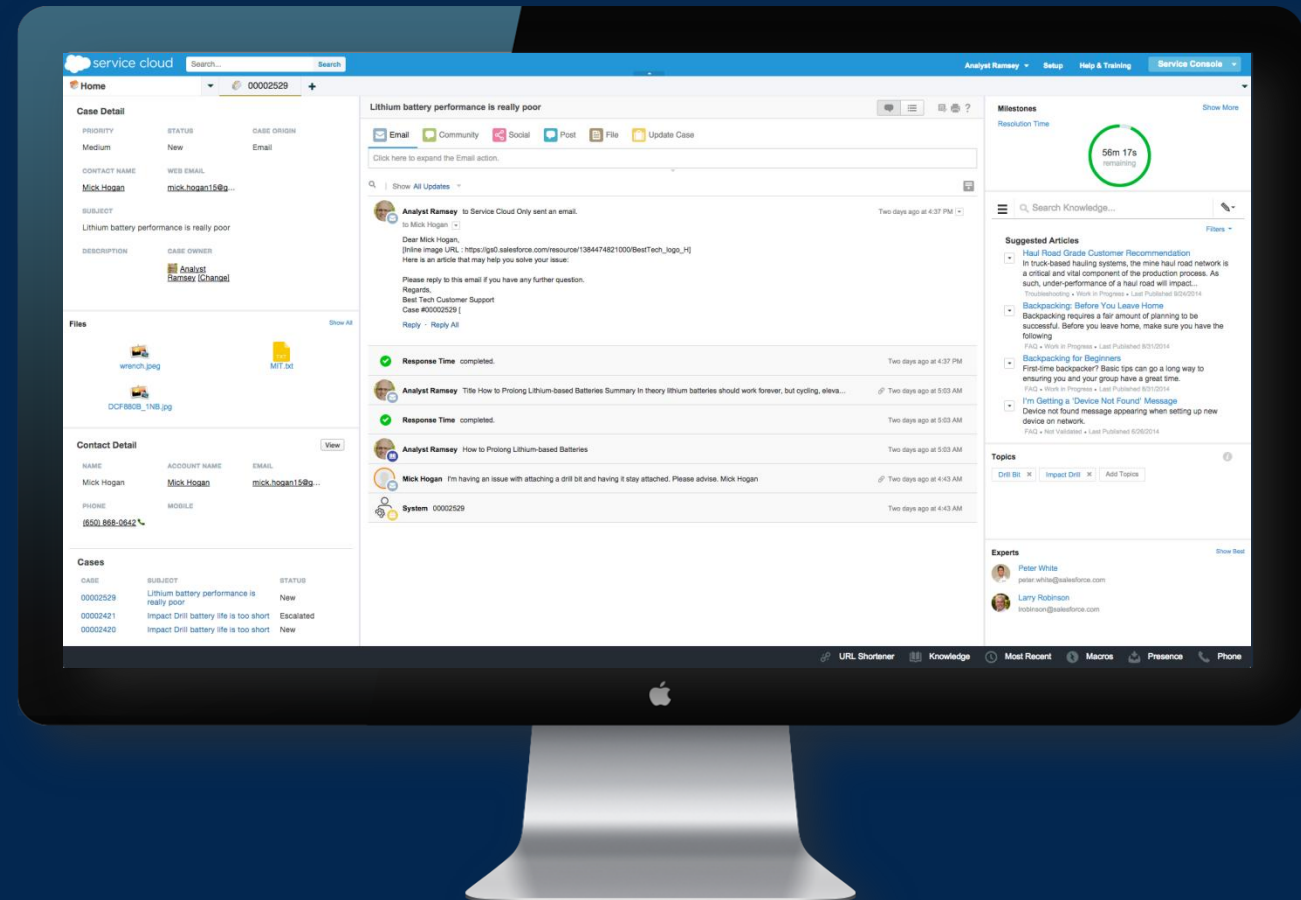
Easily Review, Update, and Close Cases

Single Chronological List of all Case Activity

Out of the Box and Extensible

Elegantly Emphasizes Critical Information

Optimized for Contact Center Agents



Salesforce (Specialist Console) real-world scenario

The screenshot displays the Salesforce Specialist Console interface. The top navigation bar includes the Salesforce logo, a search bar, and user profile information. The left sidebar contains a navigation menu with options like Home, Cases, Contacts, Accounts, Reports, Dashboards, Chatter, Libraries, Files, and Cloud Utilizations. The main content area shows a case record for 'Vendor Case / Admin Minutes' with details such as 'Stage: 3 - Entrance Criteria Confirmed', 'Status: In Progress', and 'Sub-Status: In Progress'. Below the case details is a feed of updates from users like Elio Camey, Ricky Weng, and Mark Christie. The right sidebar features a 'Knowledge' section with suggested articles and a 'Custom Links' section. A 'Followers' list is also visible. A 'Recent Tabs' window is open in the foreground, showing a list of active tabs including 'Calendar for Elio...', 'FY17 Team Acceler...', 'DF16_CSG_Staffing...', 'Knowledge Acceler...', '#ServiceOnSalesfo...', 'Specialist Speake...', 'Laulima FY17', and 'ForcePoint: Internal'.

Navigation Menu:

- Home
- Cases
- Contacts
- Accounts
- Reports
- Dashboards
- Chatter
- Libraries
- Files
- Cloud Utilizations

Case Details:

- Account: Vendor Case / Admin Minutes
- Stage: 3 - Entrance Criteria Confirmed
- Status: In Progress
- Sub-Status: In Progress
- Overall Notes: This will be with the points that become available on 7/15/16
- Subject: Svc Cloud Case Feed Design ADR
- Description: Accelerator for Svc Cloud Case Feed Design
- Case Origin: Success Services Delivery
- Case Reason: Accelerator Delivery
- Contact Name: [Redacted]
- Delivery Timezone: (GMT-05:00) Eastern Standard Time
- Delivery Language: English
- Location: United States

Feed Updates:

- Elio Camey** @Anna Krevets @Kendra Weyhrauch During the ADR Kick-O... August 8, 2016 at 5:23 PM
- Elio Camey** 2-DISCOVER-DQ-EXT-Console for Service-template.docx August 8, 2016 at 5:20 PM
- Elio Camey** 1-START-FCD-Console for Service_Template.pptx August 8, 2016 at 5:20 PM
- Elio Camey** Salesforce Case Feed Accelerator First Call (USPS) Thu, Augu... July 28, 2016 at 9:24 AM
- Elio Camey** to salesforce.com Only changed Status from New to In Progr... July 28, 2016 at 9:10 AM
- Ricky Weng** @Elio Camey - Coming your way. Please reach out to @Rob... July 21, 2016 at 3:05 PM
- Ricky Weng** changed Case Owner from Ricky Weng to Elio Camey. July 21, 2016 at 3:04 PM
- Mark Christie** changed Case Owner from Chauncey Canfield to Ricky We... July 21, 2016 at 2:45 PM
- Mark Christie** to salesforce.com Only changed Status from On Hold to N... July 21, 2016 at 2:45 PM
- Mark Christie** @Ricky Weng - Matt Bugna is transitioning out of the spec... July 20, 2016 at 3:58 PM
- Mark Christie** changed Case Owner from Matt Bugna to Chauncey Canfi... July 20, 2016 at 3:32 PM

Knowledge Section:

- Search Knowledge...
- Sort by: Published Date
- Filters
- Suggested Articles:
 - BEST PRACTICES: How to request an Accelerator** (4 stars)
Instructions on how to log an Accelerator engagement request
000220872 • Knowledge Base • Validated External
Last Published 7/25/2016
 - BEST PRACTICES: Salesforce Accelerators Overview** (4 stars)
Brief description of current Salesforce Accelerators with a link to the public web page.
000220229 • Knowledge Base • Validated External
Last Published 7/25/2016
 - Accelerator - Service Cloud Console Design**

Custom Links:

- Internal Accelerator Feedback

Files:

- 2-DISCOVER-... (DOC)
- 1-START-FCD-... (PPT)

Followers:

- No followers

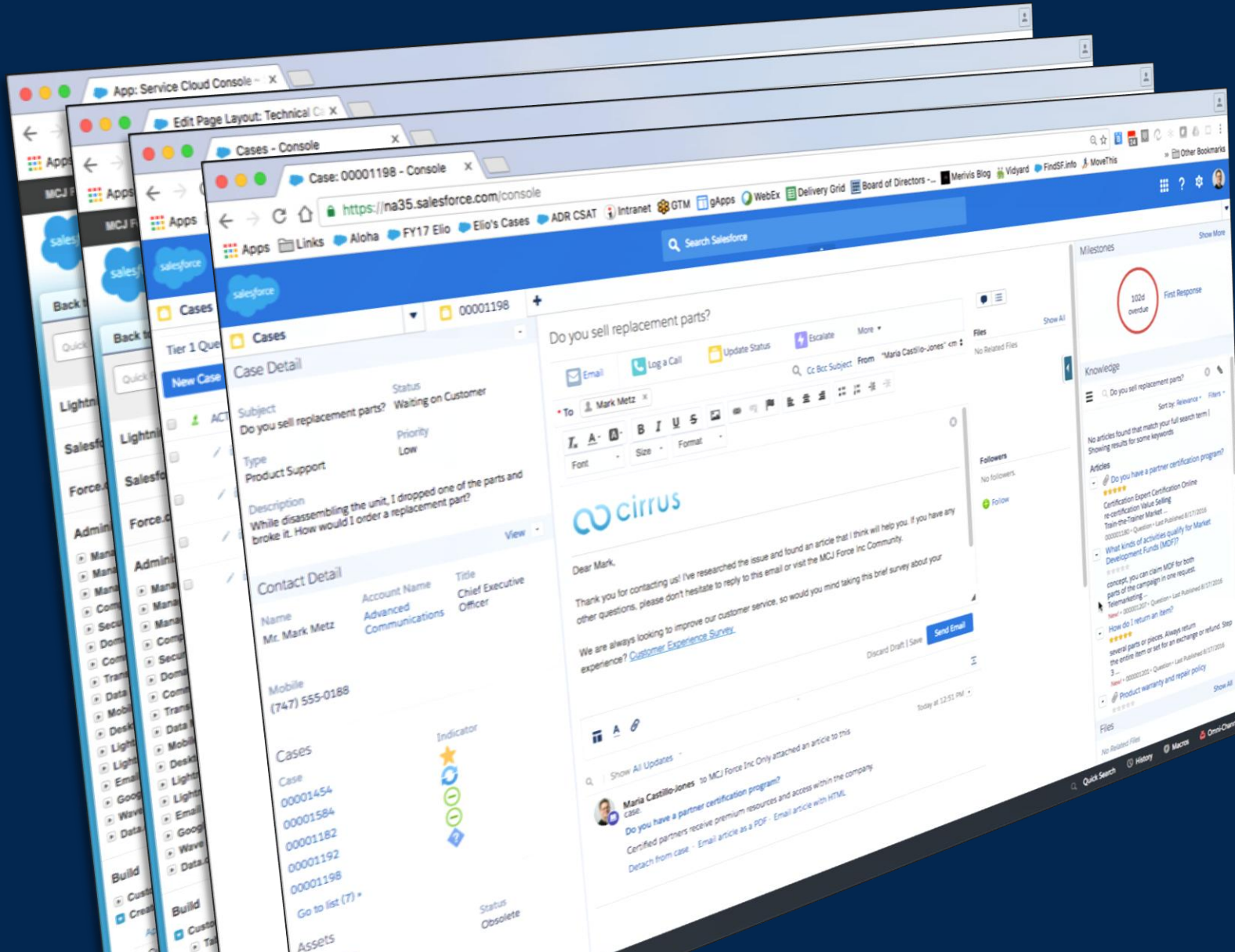
Recent Tabs:

- Calendar for Elio...
- FY17 Team Acceler...
- DF16_CSG_Staffing...
- Knowledge Acceler...
- #ServiceOnSalesfo...
- Specialist Speake...
- Laulima FY17
- ForcePoint: Internal

Bottom Bar:

- History
- Knowledge
- Macros

Building Blocks of the Console



The Console App

The Page Layout

Console List View

Single Case View

- Case feed configuration
- Case and related objects display
- Knowledge & milestones display
- Case quick actions
- Highlights panel



Demo

Pro Tips & Tricks

Declarative Setup

- ✓ No Code = 100% chance to take benefit of upcoming features
- ✓ Aligned with Service Cloud Product Roadmap
- ✓ It's fast and easy


Console Components

- ✓ Related Lists appear in same order as on the page layout
- ✓ It's easy to add custom objects or existing VF page(s)
- ✓ Navigate through multiple objects, Chatter Groups, Dashboards in Console

Case Feed

- ✓ Use Quick Actions to help agents complete common tasks
- ✓ Feed Filter in the Middle vs. on the Left frees up real estate
- ✓ Feed Filter top choice is the default





Q&A



Resources

Service Cloud Console Accelerators

*“**Accelerators** are quick, focused work sessions that solve specific Salesforce challenges”*



Service Cloud Console Design

Increase agent efficiency and productivity

Our specialists will help create a customized Service Cloud console interface, so your agents can quickly access key data and case resolution tools.

[Learn More](#)



Case Feed for Console

Increase agent productivity and customer satisfaction

Our Service Cloud experts will help configure Salesforce Console so your agents can update case records more efficiently and find historical records more quickly.

[Learn More](#)



Service Cloud Macro Design

Slash case resolution times with macros

Our experts will help define macros that enable agents to streamline repetitive tasks and minimize data entry errors.

[Learn More](#)

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Getting Started with Service Cloud

EVERYTHING YOU NEED TO GET UP AND RUNNING WITH SALESFORCE

FUNDAMENTALS

Your Success Community

Ask questions, get answers, and stay up to date.

► [SUCCESS WITH SERVICE CLOUD](#)

Trailhead

Learn the basics around Service Cloud.

► [GETTING STARTED WITH SERVICE CLOUD](#)

CREATE

Trailhead

Learn key aspects of Service Cloud, including automating case management and configuring the Salesforce Console.

- [KEEP CUSTOMERS HAPPY WITH SERVICE CLOUD](#)
- [SERVICE CONSOLE CUSTOMIZATION](#)
- [CASE FEED](#)

Help & Training

Review these resource guides for details and tips.

- [CASE MANAGEMENT IMPLEMENTATION GUIDE](#)
- [CONSOLE IMPLEMENTATION GUIDE](#)

PREPARE

Help & Training

Review documentation on key components of Service Cloud.

► [SERVICE CLOUD DOCUMENTATION](#)

Circles of Success

Join an interactive discussion with other Service Cloud customers to share best practices.

► [GETTING STARTED WITH SERVICE CLOUD](#)

DEPLOY

Circles of Success

Join an interactive discussion with other Service Cloud customers to share best practices.

- [3 WAYS TO IMPROVE CUSTOMER SERVICE](#)
- [IMPROVE CUSTOMER SERVICE WITH REPORTS & DASHBOARDS](#)

Videos

As part of our Getting Started series, learn tips on how to drive end-user adoption through training, support and motivation techniques.

► [DEPLOY AND EMPOWER YOUR END USERS](#)

[Getting Started with Service Cloud](#): The central hub of resources, including videos, documentation, and small discussion groups

Join the Success with Service Cloud Community

Ask Questions. Get Answers. Share Experiences.

Join Now




[Success with the Service Cloud](#): Get connected to the Service Cloud community. This is a forum to ask questions, get answers, and share experiences.

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Learn more about Salesforce Console





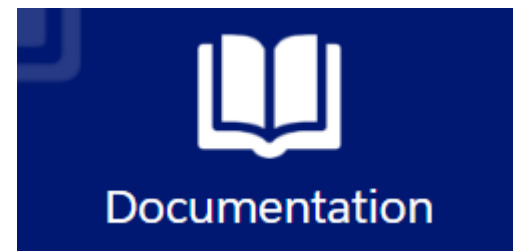
1 hr 35 mins

4 UNITS ▾

Service Console Customization

Customize the Service Console to increase agent productivity and make your customers love you.

Beginner | Admin



Help & Training

[Set Up a Salesforce Console for Service](#)

[Salesforce Console Implementation Guide](#)

[Service Console Customization](#) (Module)

[Service Cloud Basics: Configuring a Salesforce Console](#)



Release Readiness & Feature Adoption

GROW AND MAXIMIZE YOUR SALESFORCE ROI

Webinar - New Releases: Mastering Your Readiness Strategy

Winter '17 is on the way. Are you prepared? How do you manage your release planning? Would you benefit from some best practices on the topic? Why not join us as we have a discussion with **Chris Edwards** and **Michael Gill**, Salesforce MVPs and the authors of <http://www.salesforceweek.ly/> about how to manage new releases.



Chris Edwards
MVP /
SalesforceWeek.ly



Michael Gill
MVP /
SalesforceWeek.ly

REGISTER



Date: Wednesday, September 7
Time: 9AM PDT/12PM EDT/5PM BST

Subscribe to the weekly updates by visiting our [Release Readiness & Feature Adoption](#) group and clicking  [Join](#)



[Community Events Calendar](#)



thank you