
Deflect Retail Banking Cases

Salesforce, Spring '24

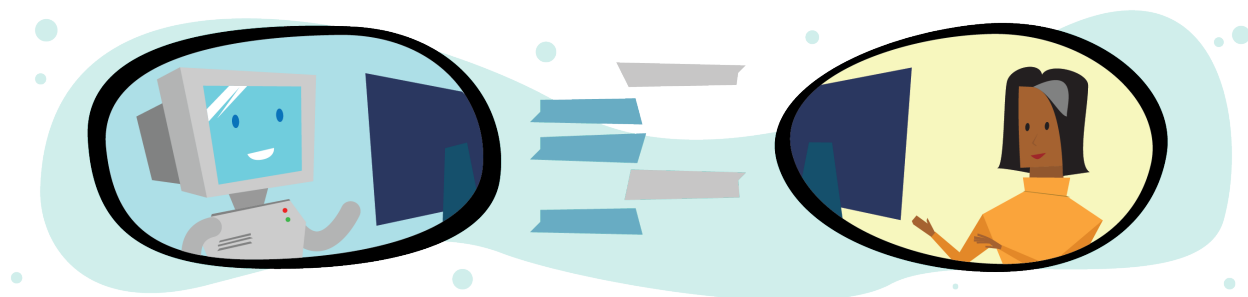


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DEFLECT RETAIL BANKING CASES

Manage a high volume of customer service requests related to retail banking.



Get Started

This kit helps financial institutions handle a high volume of service requests. Salesforce cross cloud tools provide digital channels to manage this anticipated volume. The tools in this solution kit address customer's needs responsively while reducing traffic to call centers and adding visibility to the process.



Explore system architecture related to this solution.

- [Industry Blueprint for Retail Banking](#)
- [Reference Architecture for Retail Banking](#)
- [Solution Architecture for Retail Banking](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)
- [Customer 360 Guide for Retail: Quick Look](#)
- [Customer 360 Guides: Quick Look](#)

This solution kit helps you:

- Drive customers to information and solutions delivered via digital channels.
- Automate simple case requests to offload call center volume.
- Deliver a personalized customer experience when you connect Service Cloud and Marketing Cloud.
- Limit human interactions on cases that require a phone conversation because of sensitive or specific information.
- Track the solution's impact against your call center and financial portfolio.

Required Products

- Marketing Cloud Enterprise 2.0

- Experience Cloud
- Einstein Bots
- Service Cloud

[Workflow](#)

Learn how data flows through the configurations when you deflect retail banking cases.

[Design Considerations](#)

Keep these design considerations in mind when you deflect retail banking cases.

[Configurations](#)

Use these configurations to deflect retail banking cases.

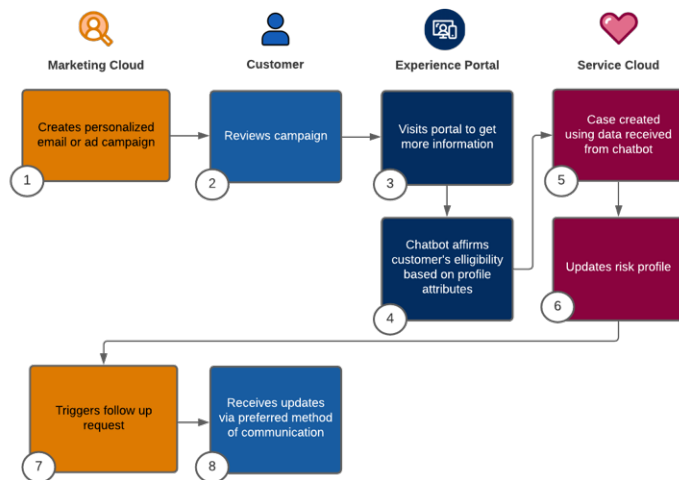
SEE ALSO:

- [Deliver Seamless Journey for Financial Services Customers](#)
- [Coupon Redemption Solution Kit](#)
- [Order on Behalf Of Solution Kit](#)
- [View Order History and Cancel Orders Solution Kit](#)
- [Personalized Marketing Recommendations Solution Kit](#)
- [Transactional Emails Solution Kit](#)

Workflow

Learn how data flows through the configurations when you deflect retail banking cases.

Workflow



This diagram illustrates the retail banking case deflection workflow.

1. Marketing Cloud creates a personalized email or ad campaign based on the customer’s profile.
2. The customer opens the email or campaign communication.

3. The customer is directed to the Experience Cloud portal for more information.
4. The chatbot affirms the customer's eligibility based on profile attributes.
5. A case is created using the information the chatbot received.
6. Marketing Cloud updates the customer's risk profile.
7. Marketing Cloud automatically triggers a follow-up request for the customer.
8. The customer receives updates via their preferred method of communication.

Related Content



Take the next steps in this implementation.

- [Design Considerations](#)
- [Configurations](#)

Design Considerations

Keep these design considerations in mind when you deflect retail banking cases.

Key Considerations

Understand your choices when deflecting retail bank cases.

Use Einstein Bots vs Web-to-Case

To ease your service agent's loads, consider Einstein Bots. Bots can answer questions, handle intake, and capture requests that don't require a person to respond. That frees your agents to handle more complex issues. Bots also can gather prechat information to save your agents time. Use bots as a way to help deflect large volumes of cases. You can use Web-to-Case or existing process automation as an alternative to bots.

Weigh Pros and Cons of an Experience Cloud Portal Versus an Existing Website

Experience Cloud portals provide an easy way to extend information that already resides in your CRM directly to customers. Your current website and CRM practices can seem to adequately expose cases and any customer details that you're tracking without taking on the task of building a portal. And Your customers can also employ an existing website for capabilities such as single sign-on. However, after you integrate its Experience Cloud portals integrated with your CRM, Experience Cloud portals offer you solution that requires little development. The portals tie directly into your service platform and reduce traffic to your call center for high-volume requests.

Secure Your Experience Cloud Site

For public, unauthenticated portals, follow the [best practices guidelines](#) on securing your Experience Cloud site.

Secure Confidential Data

Use Salesforce [Shield and platform encryption](#) for your highly confidential data.

Performance and Scalability Considerations

The performance and scalability of your case deflection solution are crucial to its success.

Consider these attributes that enhance performance.

- Make user creation and registration lightweight and asynchronous. Consider performing operations in batches.
- Understand the performance implications of concurrency on landing pages. Perform robust performance testing to examine the effects of custom components on a single page and the total registered users. Avoid hitting limits for Experience Cloud portals.
- Consider the design complexity of landing pages. Analyze the number of custom components on a single page and the complexity of the sharing sets in your Salesforce environment.
- Improve performance by setting up a Salesforce Experience Cloud Content Delivery Network (CDN).
- Enable Event Monitoring and set up dashboards to watch front-end and back-end performance.
- Review the Concurrency Limits Module and volume-sensitive Governor Limits doc.

Scaling under load is key to success. Work with your account team and CSM to determine the best approach if you expect new users to be registered or created at high volumes in a short time. Consider these resources for more on scaling limitations and guardrails.



- [Flow Limits and Considerations](#)
- [Experience Cloud Sites Usage Allocation](#)

Recommended AppExchange Apps

Incorporating eSignature capability is a timesaving way to advance necessary document processing.

The DocuSign eSignature for Salesforce app is a powerful, convenient, and legal way to remotely register customer sign-off on necessary documents.

Related Content

	Review earlier steps in this solution. <ul style="list-style-type: none"> • Workflow
	Take the next steps in this implementation. <ul style="list-style-type: none"> • Configurations

Configurations

Use these configurations to deflect retail banking cases.

The Deflect Case Volume solution configures cross-cloud Salesforce products to work together. The key components are Marketing Cloud, Customer Portals, Einstein Bots, and Service Cloud. Salesforce administrators can build dashboards to track and analyze the solution.

Step 1: Configure the Campaign in Marketing Cloud

Find customers who are most likely to qualify for a request and target them with an email campaign. The email contains links to a self-service customer portal.

Use Marketing Cloud to create a profile of at-risk customers. Then configure and launch an email campaign to invite customers to get started on their requests via the portal.

- [Setup Marketing Cloud Connect](#)

- Build and configure the email campaign to target customers' profiles most likely to be at risk.
- Set up mass emails to [throttle](#) down in anticipation of heavy response rate.
- Drive recipients to the customer authentication portal via a link in the email.

Step 2: Set Up a Customer Portal in Experience Cloud

Create a Knowledge Base (KB) with informative articles on case processing. Assign KB owners and create a process to update articles as new laws and best practices emerge. Create a channel menu and an Einstein Bot to deflect call traffic and link to the KB.

The goal of this step is to create a self-service digital portal. The portal informs customers as they create case requests.

- Build out a Knowledge Base (KB) with articles that inform customers about COVID-19 topics with a focus on potential implementations and the latest updates.
- Identify key personnel to update KB articles as changes in government mandates arise. Build out a review and approval process to expedite those updates.
- To drive customers to digital channels, implement a [channel menu](#).
- Consider [audience-targeted](#) content based on the customer profile in the Experience Cloud site.
- To handle basic call deflection and link to knowledge base articles, implement an Einstein Bot.

Step 3: Define Process Automation with an Einstein Bot

Gather existing customer and desired case data, and request customer buy-in on a preferred communication protocol to track progress. Create a bot to update records across Salesforce Service Cloud.

This task assures that customer-provided data and case requests are processed and obtain buy-in from customer on how best to update them.

- Gather data from the customer regarding the case request.
- Create an Einstein Bot that updates existing CRM platforms (Salesforce Service Cloud) with immediate short-term extensions to other back-end processing systems.
- Validate that follow-ups to customers use their preferred contact methods and that customers have given consent to be contacted.
- Incorporate email follow-ups and confirmation with optional e-signature integration that confirm case requests.
- Identify the desired means of communication for future contact such as phone, email, or SMS.

Step 4: Configure Service Cloud to Manage Requests

Create a case management process to handle a range of high-volume case request scenarios. Set up an internal Knowledge Base to inform decision-makers of the latest government and institutional mandates.

- Establish criteria for customers at further risk of default that divert them to the best available courses of action.
- Establish key milestones and escalation paths based on corporate standards and mandated government guidelines.
- Create custom record types, case routing, and management processes for case requests.
- Identify key document requirements and internal processes and procedures for verification.
- Create an internal KB containing article updates to CARES Act requirements.
- Link existing available information to case records.
- Create processes and workflows that support case processing.

Step 5: Configure Journey Builder in Marketing Cloud

Use Salesforce Marketing Cloud and Journey Builder to automate updates and notifications as customer cases are processed.

This key component task automates much of the case management, including issuing updates to customers. It does so by establishing a process that is standardized yet responds to customer-specific concerns.

- Configure the entry event for Journey Interaction based on the customer profile in the case.
- To automate updates on cases and create tasks or any other follow-up actions for case servicing specialists, use Journey Builder activities.
- Automate notification messages based on updates to case stages or customer-required steps. See Service Cloud case management.
- Include notifications that reflect the preference options offered to the customer in the bot and stored within the case data.

Step 6: Use Dashboards to Track and Analyze the Solution

Create dashboards that follow key metrics. The dashboards provide insights into how well the solution is meeting expectations. Dashboard reports can also indicate areas of improvement.

This key component task provides visibility to the success and impact of case deflections.

Identify and build dashboards that capture and display performance data for tracking the initiative, including:

- Call volume and throughput.
- Financial portfolio impacts.
- Current stage and process metrics.
- Call resolution metrics.
- Compliance documentation updates to customer facing and internal KBs.

Related Content



Review earlier steps in this solution.

- [Workflow](#)

- [Design Considerations](#)

SEE ALSO:

[Public Customer Community](#)
[Einstein Chatbot](#)
[Omni Channel Routing](#)
[Set Up Queus](#)
[Set-Up and Manage Salesforce Communities](#)
[Salesforce CMS](#)
[Manage Your Community's Pages and Their Properties in Experience Builder](#)
[Admin Beginner](#)
[Service Cloud Basics](#)
[Service Cloud for Lighting Experience](#)
[Omni-Channel Readiness and Digital Engagement](#)
[Service Cloud Agent Productivity](#)
[Einstein Bot Basics](#)
[Getting Started: Platform: Application Security](#)
[Insights: Service Cloud: Dashboards Fast Start](#)
[How To: Service Cloud: Automate your Case Management](#)
[How To: Service Cloud: Design your Lightning Console](#)
[How To: Service Cloud: Automate Work Distribution with Omni-Channel](#)
[Getting Started: Service Cloud: Digital Engagement](#)
[Getting Started: Service Cloud: Einstein Bots](#)
[Getting Started: Community Cloud: Customer Community Fast Start](#)
[How to: Community Cloud: Build a Customer Community](#)
[How to: Community Cloud: Create a Public Knowledge Base](#)