

Salesforce Service Intelligence

Salesforce Service Intelligence is an intelligent out-of-the-box application built on Salesforce Data Cloud that combines Service Cloud best practices, customized features, pre-built dashboards, and calculated insights to provide service leaders and agents with real-time insights into service performance.

- Prebuilt dashboards for service leaders and agents provide a complete real-time view of key performance metrics to help them make data-driven decision to increase efficiency and optimize the use of time and resources.
- Einstein Conversation Mining uses natural language processing (NLP) to identify the most common types of interactions with customers, key characteristics of those interactions, the average conversation frequency, and time and complexity to resolve to help service teams identify the best opportunities for automation.
- Calculated insights such as the Customer Effort Score inform recommendations of next best actions to take with customers.



FROM THE SUMMIT

Service leaders are challenged by multiple data sources, applications, and systems. Service Intelligence brings data and signals from those sources together in a single view for real-time understanding of service performance trends and issues to help them optimize teams and processes while identifying opportunities for automation.



DEEP DIVE

Even Service Cloud customers with dedicated business analysts are challenged to integrate, normalize, and analyze that data to optimize their service operations. Service Intelligence's prepackaged approach speeds time to value and cuts ongoing technology management costs while driving efficiency and productivity.



LONG VIEW

Most service leaders will continue to have multiple systems and applications to support service interactions for some time to come. Salesforce's play here is to be the platform that brings all that data together, highlighting the value of Data Cloud, Tableau, Einstein, and MuleSoft and driving more rapid adoption and value.



MONEY: Service Intelligence is available for free to Salesforce Unlimited Plus customers; other Service Cloud customers can license it on a per-user basis.



MARKET: With this offering, Salesforce is competing against standalone customer data platforms (CDPs) and prebuilt service-specific analytics and AI packages, differentiating based on its CRM-native approach and prebuilt capabilities.



PEOPLE: Service Intelligence focuses on both service leaders and agents. However, in the short term, the biggest gains are likely to be from broad data-driven changes by leaders in areas like automation rather than individual agent improvements.



TECH: Some may be skeptical of Salesforce's ability to bring data from all these disparate systems together. Successful deployments, particularly those with complex footprints, will highlight the value of Data Cloud beyond just a CDP.