

Alliance Data (90-Minute Timebox)

Salesforce Service Cloud

Support Models

- Cases (support tickets)
 - Limited to specific users
 - Create/View/Edit
- Questions
 - Answered by AD
 - Answered by “The Community”
 - **Searchable**
- Knowledge Articles
 - Enlighten the user about a given topic
- Instructional Guides
 - Explicit instructions or steps to achieve a goal or complete a task related to the product
- Communities
 - Allow discussions between clients
 - Submit ideas or feature requests
 - Allow voting
- Communications
 - Product releases
 - Notes
 - Demos/Videos
 - Upcoming product releases
 - Site down communication
 - Email
 - Status page

Operations

Case/Support Ticket Creation

How your clients enter or create tickets is extremely important. Initially, you may feel obligated to give your clients as many different channels to create a ticket as your team can handle. This is likely not the best strategy in the long run. Keeping support limited to one channel has many benefits.

The main benefit is forcing your client to use one central location for their help/support needs. Other benefits to having one channel, better measurement of data and success metrics. It also allows you to continue to incrementally expand your support platform in the future.

- Support Portal
 - User licenses
- Web-to-case
 - Web form with relevant fields/questions
 - Hosted by SF
 - Hosted by Alliance Data
- Email-to-case
 - Reply via email
- Text-to-case

Case or Ticket Access

- View Ticket
 - Currently open tickets
 - Closed tickets
 - Sorting/filtering
 - Status
 - Date
 - Submitted by user vs organization
 - **Bonus Functionality: making subject/body/comments searchable**
- Editing tickets
 - You'll likely want to limit the editing of tickets once they created
- Visibility
 - Who can see tickets
 - Who can add comments to a ticket

Attachments

- File Types
 - Documents
 - Excel, word, pdf, etc
 - Images
 - Videos
- Upload Size Limits
- Downloadable
 - Once attached, both parties should be able to click-to-download
- Storage limitations
 - Data costs

Objects

- Case
 - Primary object
- Account
- Custom Objects
- Object Limits?
 - The number of objects needed could affect the portal vs community decision as well as costs

Communication

Communication is at the heart of strong client support systems. Communication, however, goes beyond just getting alerted in one way or another. Context, ownership and assignment are all very important nuances of a support case ecosystem.

Ownership

- Case owner
 - The person or team responsible for ensuring the issue is resolved
- Case assignee
 - The current person or team responsible for the next task required
- Client Success Manager

- When a client creates a support ticket, best practices may dictate that the account manager would be notified of all or critical issues

Statuses

- Customer facing
 - Seen by both sides
 - Should communicate progress and give confidence to the user that their issue is in progress and not stuck or forgotten.
- Internal
 - Only seen internally
 - Help teams monitor ticket progress
 - Indicates actions needed

Communication Methods

- Delivery
 - Email
 - Text Messaging
 - App notification
- Events
 - Creation
 - Comments
 - Closing
 - Edits to fields
 - Status changes

Measurement & Analytics

Analytics

- Client usage of support hours/effort
- Average support traffic/time
- Billable support
- Most frequent ticket types

Success

- Time to 1st response
- Time to close
- Segmented by analyst/team
- Resolution frequency
- Feedback surveys

User Stories & Roles

Role: User

Story: As a **User** creating a support ticket, I want to **attach a file** so that **I may provide better context of the issue I am experiencing**

Acceptance Criteria:

1. There needs to be a button on the ticket creation screen allowing user to browse local storage and select a file.
2. Upload limits need to be communicated to the user in an appropriate way
3. Users need to be able to upload common file types, .Doc, .Docx., .Xls, .Xlsx, .jpg, .png, .mov*, .mpg*
4. A confirmation message or alert should let the user know that the file has been attached successfully
5. Users need to be able to cancel or remove an attachment
6. Attachments need to be displayed on the case in their own section with key identifying fields and labels

*Discussion point - viability of video file types, limits, storage

Role: Power User

Story: As a **Power User** I want to **remove a user** so that **prevent logins from past employees**

Acceptance Criteria:

1. Power users needs to be able to see a list of current active users
2. The Power user needs to be able to select one or more active users from the visible list
3. The Power user will then click on a button or select an option to remove the selected users
4. Presenting a warning message will confirm the action is desired and prevent accidental user deactivation
5. A confirmation message that communicates the **successful removal*** of a user will notify the Power User that the task is complete.
6. Upon completion, the process should be easily repeatable.

*Discussion point - remove vs deactivate



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