



# Focus: Closed-Loop Feedback

# CMI Closed-Loop Platform Options

	Standard	CMI + Salesforce	Enterprise Salesforce
	Slides 3 - 6	Slides 7 - 15	Slides 7 - 15
<b>Dashboard Developer</b>	CMI	CMI	CMI
<b>Hosting</b>	CMI	CMI	Brand
<b>User Email Domains for CLF</b>	White Labeled Domain	Brand Emails OR White Label Domain	Brand Emails
<b>Hierarchy Management</b>	CMI	CMI or Brand	CMI or Brand
<b>Cadence of Data Updates</b>	15 minutes	15 minutes	Brand's discretion
<b>Best Dashboard Pairing Option</b>	Standard Dashboard	CMI + Tableau	Brand's Hosted Tableau
<b>Best Use Case for You</b>	<ul style="list-style-type: none"> <li>✓ Use in pairing with standard dashboards</li> <li>✓ Most cost effective</li> <li>✓ Quickest implementation time</li> </ul>	<ul style="list-style-type: none"> <li>✓ Best in class closed loop system</li> <li>✓ Complex case routing for business rules and service agent skills / roles</li> <li>✓ Case reassignment, escalation, monitoring</li> <li>✓ Records all CLF touchpoints (calls, emails, etc.)</li> <li>✓ Salesforce 24/7/365 end user support</li> <li>✓ Best in case monitoring and alerts to close out cases</li> <li>✓ Einstein autogenerated suggestive text for agents</li> <li>✓ Leverages CMI's best-in-class salesforce pricing</li> </ul>	<ul style="list-style-type: none"> <li>✓ Best in class closed loop system</li> <li>✓ Complex case routing for business rules and service agent skills / roles</li> <li>✓ Case reassignment, escalation, monitoring</li> <li>✓ Records all CLF touchpoints (calls, emails, etc.)</li> <li>✓ Salesforce 24/7/365 end user support</li> <li>✓ Best in case monitoring and alerts to close out cases</li> <li>✓ Einstein autogenerated suggestive text for agents</li> <li>✓ Leverages your company's pricing</li> </ul>

Best-in-class  
solution



# CMI + Salesforce Closed Loop System



Harness the  
Expertise of CMI  
Propelled by  
Salesforce's Case  
Management  
Platform.



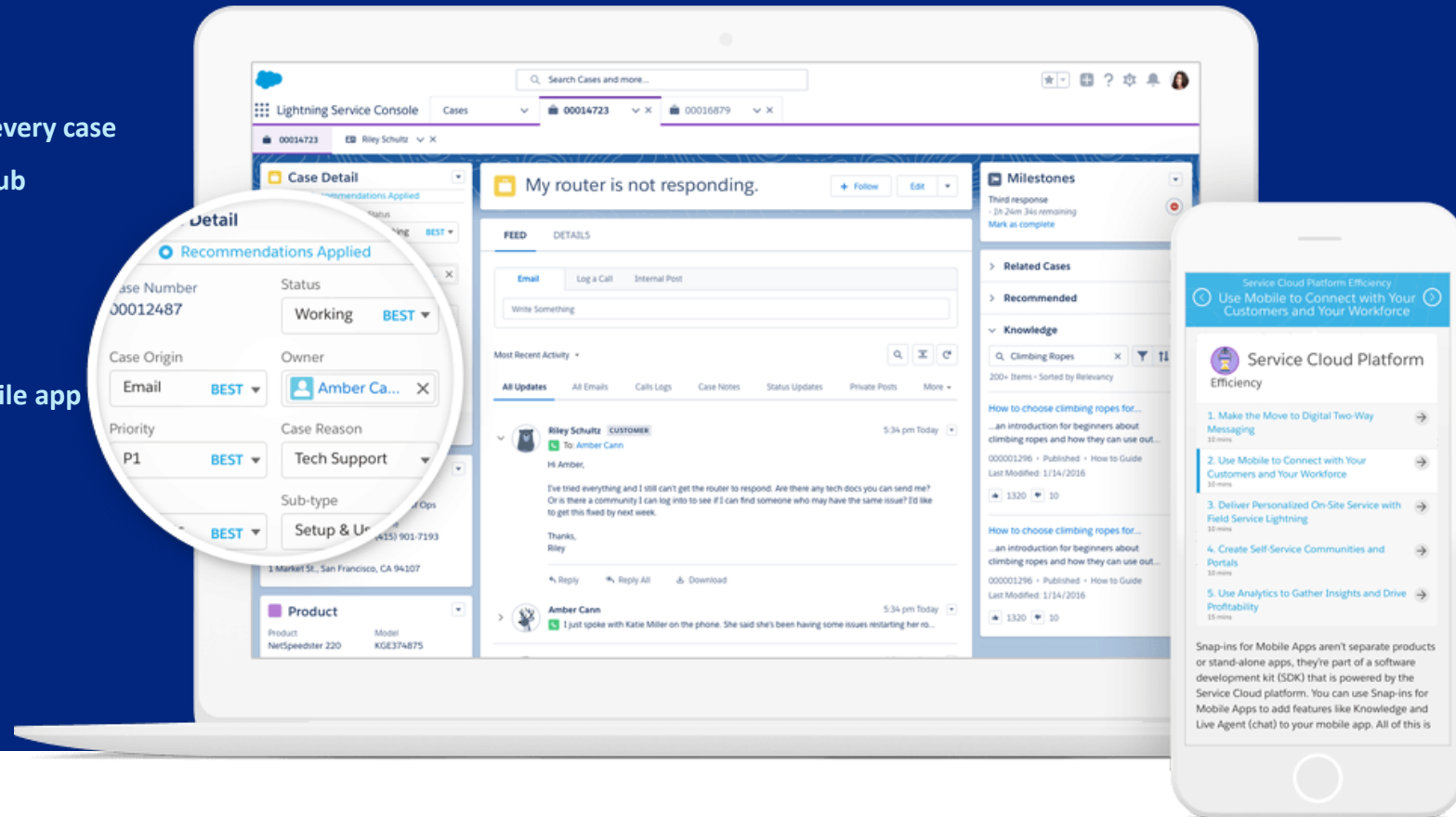
cm<sup>i</sup> +

salesforce

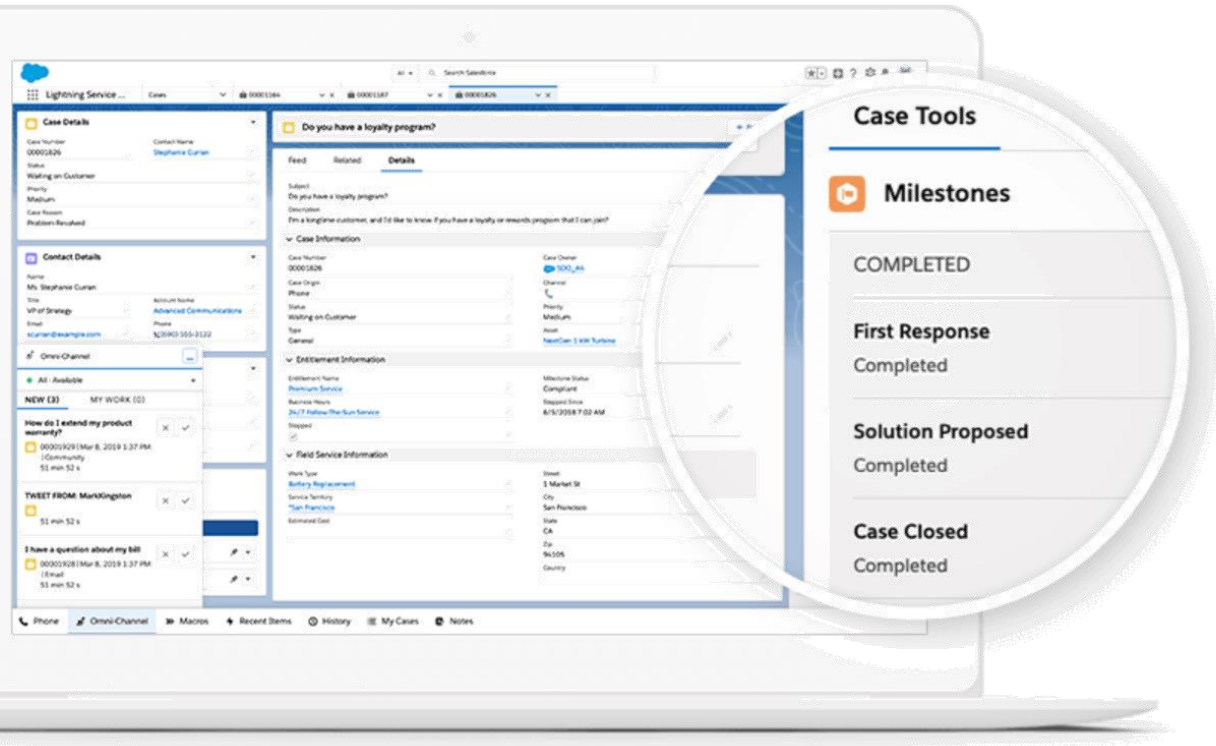
# Deliver a Best-in-class Experience

CMI's substantial knowledge and CX skills are used to implement & administer the world's most comprehensive CLF solution.

- Personalize every customer conversation
- Always respond with the right level of service
- Easily track, manage, and resolve issues with a unified view of every case
- Unlock all your data into one complete view using CMI's data hub
- Use service insights to create more personalized marketing
- Identify opportunities and issues from any location or device
- Solve cases faster with insights from self-service communities
- Resolve issues out in the field faster with our cutting-edge mobile app
- Easily set up workflows using our guided experiences
- Maximize productivity by customizing the agent console
- Always be ready for any customer service surge
- Scale up your support operations faster with AI
- Exert total control over security, compliance, and monitoring



# Ensure Consistent & Accurate Support Every Time



## Route the right case to the right agent, every time.

Increase first-contact resolution by automatically routing cases to the best agent or team for the job based on their skill set and availability.



## Guide agents by automating processes.

Automatically surface next steps and actions to agents right in their workspace based on what the customers need. Ensure compliance by specifying a sequence of steps that are required to resolve a case, including whom to ask and what to do at each point of the process.



## See the full context of all cases.

See every customer interaction in a chronological timeline, regardless of channel. Every voicemail, email update, knowledge article, or anything else about a case appears in our flexible news feed.



## Know what to focus on and when.

Get customer activity updates and alerts when action is needed and ensure you're always responding with the right level of service with entitlements and SLAs.

# Omni-Routing of Cases

Deliver more efficient support by routing cases to the right agent using Omni-Channel Routing.

- 1. Route cases through best-in-case logic and AI intelligently.**  
Automatically route cases, leads, or other work to the most appropriate, available employee (considers PTO). Distribute work based on skill set, availability, or workload. Always be sure high-priority work gets the immediate attention it needs.
- 2. Supercharge each case manager's efficiency.**  
Push cases and conversations from any channel directly into the agent workspace — even IoT signals. Give case managers one place to talk to customers no matter what channel they use, whether it's messaging, chat, social, email, or voice.
- 3. Help case leaders manage their entire team.**  
Give your managers a bird's-eye view of their case teams and let them monitor conversations between agents and customers and send helpful messages. Give your case leaders the ability to raise flags on conversations when they require assistance.

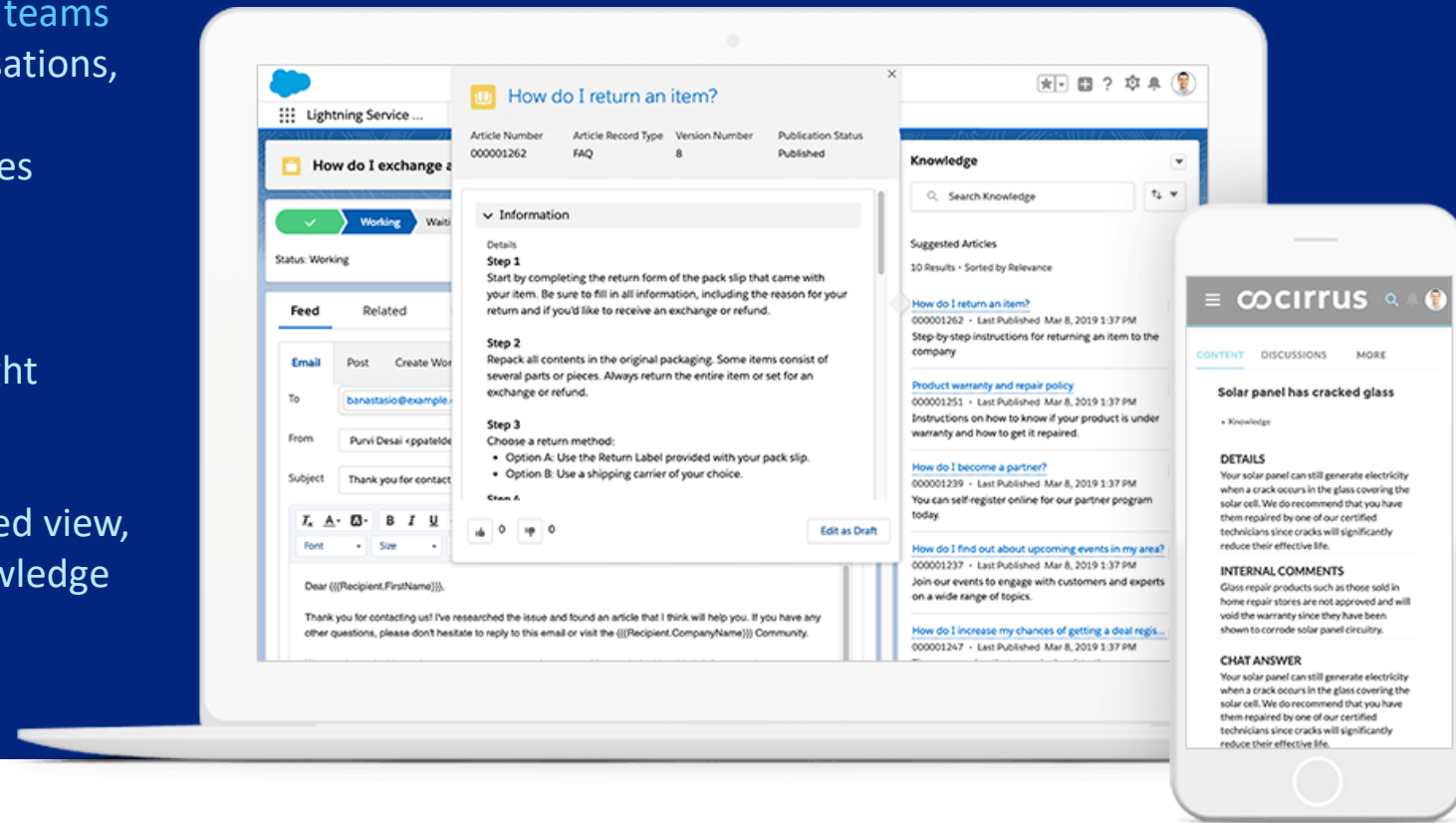
# Tools to Support Case Managers

**Templated scripts and Einstein AI support** help service teams

- improve productivity / streamline customer conversations,
- capture all needed information,
- reduce case management training time and resources
- promote a consistent customer experience,
- and reduce errors.

**Workflows enable agents to quickly navigate** to the right script at the right time.

**Integrate multiple information sources** into a centralized view, chat, customer self-help portals and communities, knowledge base, and more.





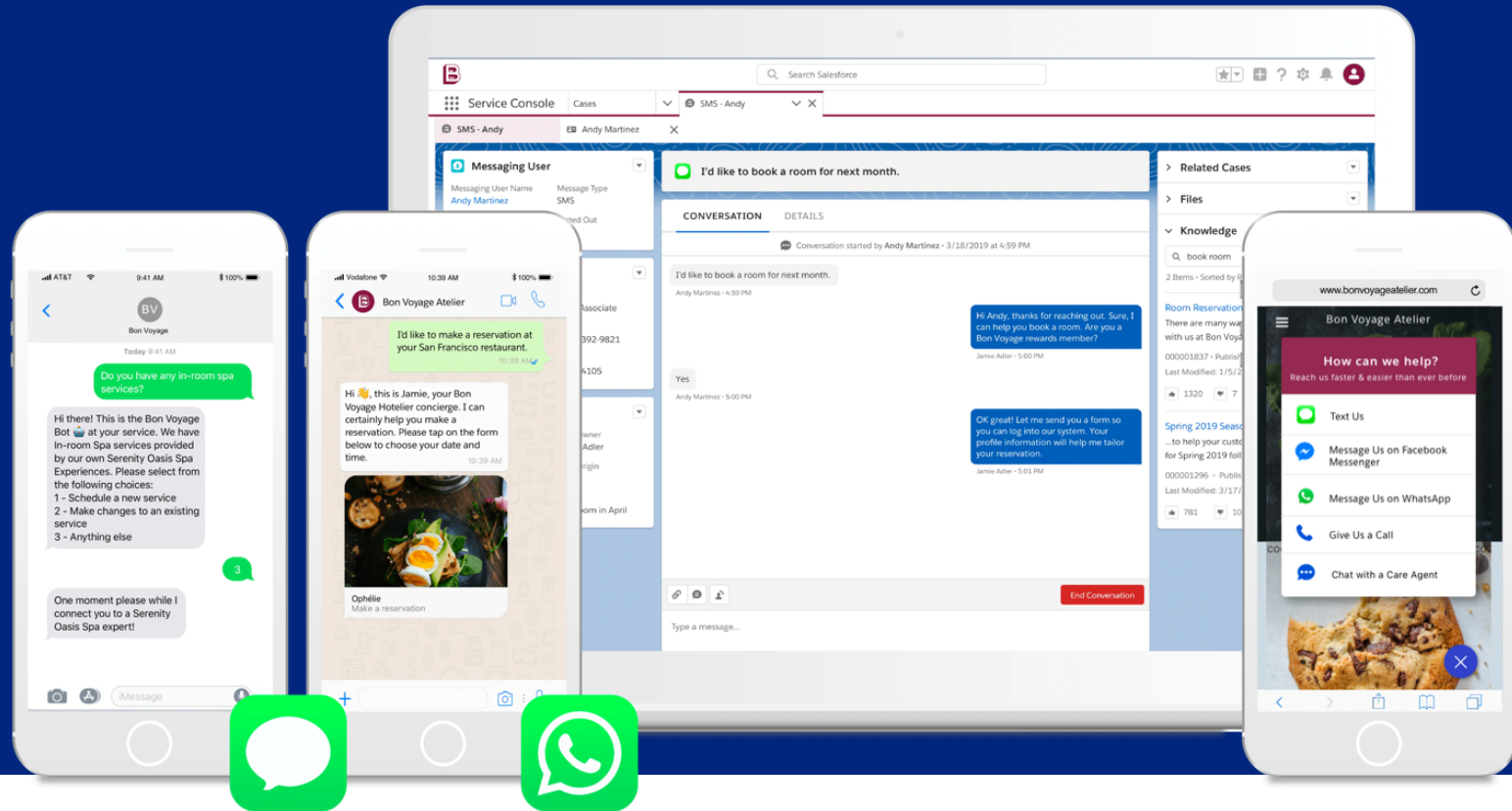
# Deliver Personalized Communications

## Give customers help anytime from any messaging app.

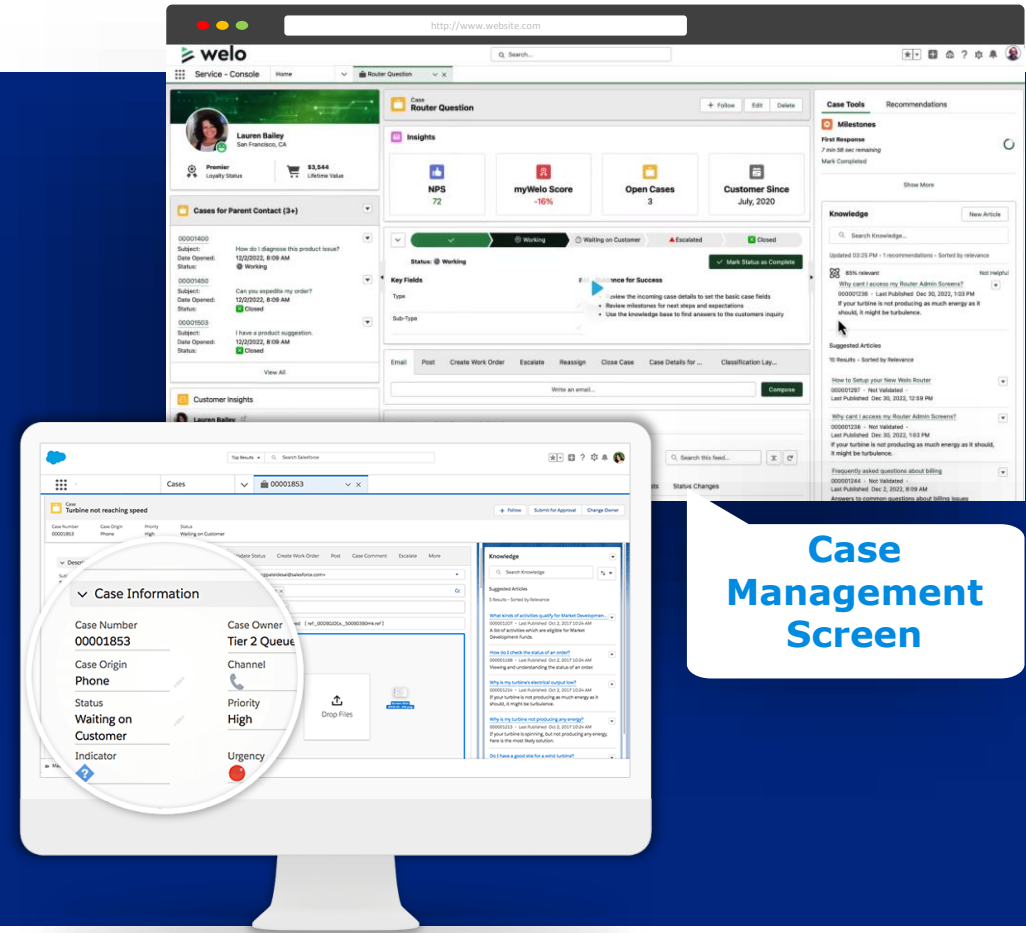
Easily connect to your case managers and customers at any time through our chat functionality. Use your customers' preferred messaging apps, like SMS, WhatsApp and Facebook Messenger. Soon, functionality will expand to WeChat. Plus, you can add chatbots to SMS and WhatsApp chats to automate routine asks.

## Empower case managers with conversational messaging from one place.

Be there for customers the way a good friend is — with mobile messaging. Case managers can send messages while having instant access to the information they need to address customers — all within the Service Cloud Console.



# A System Built for Case Managers

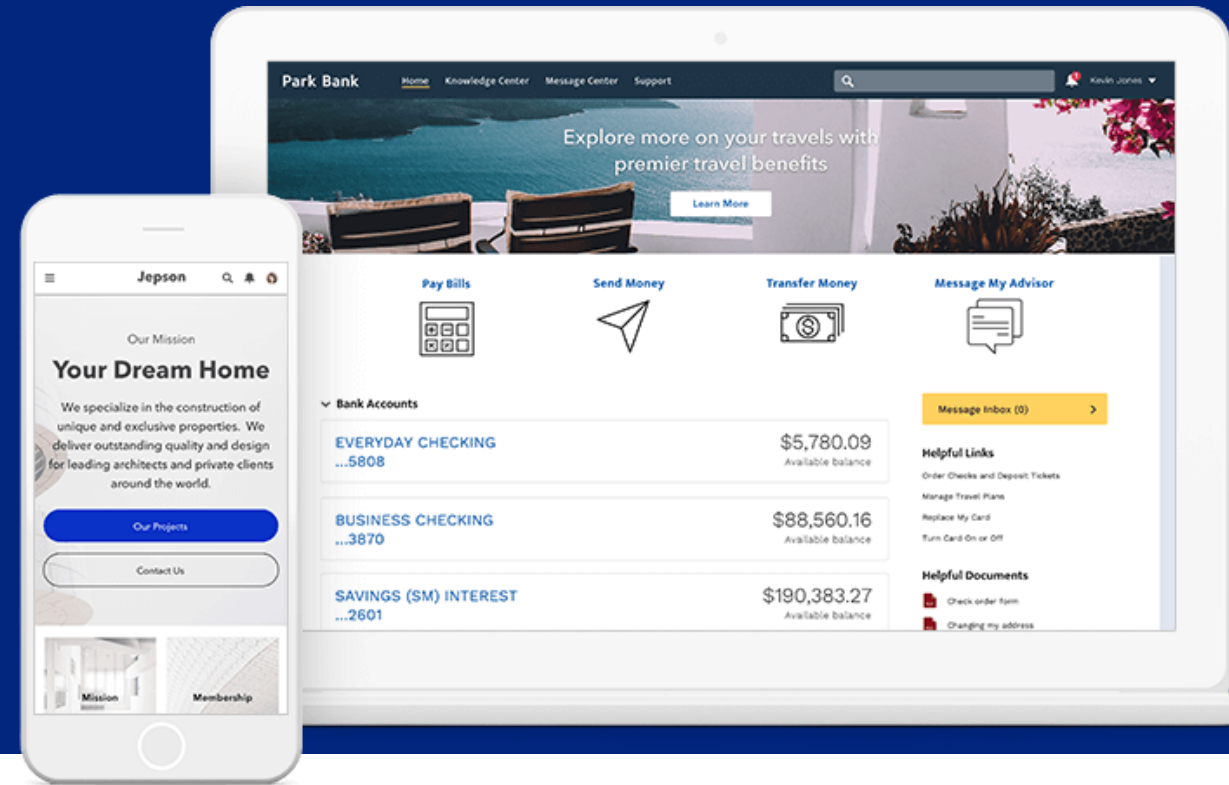


Case Management Screen

Case manager's customizable homepage  
Details their cases and metrics at-a-glance

# Self-Service Customer Help Center

- ✓ Develop a customer landing page for all cases
- ✓ Scale support with service embedded directly into your portal. Allowing customers to self help and close their own cases.
- ✓ Allow for customers to check their case status and message their case advisor.
- ✓ Deliver a personalized customer experience using automation and chatbots.

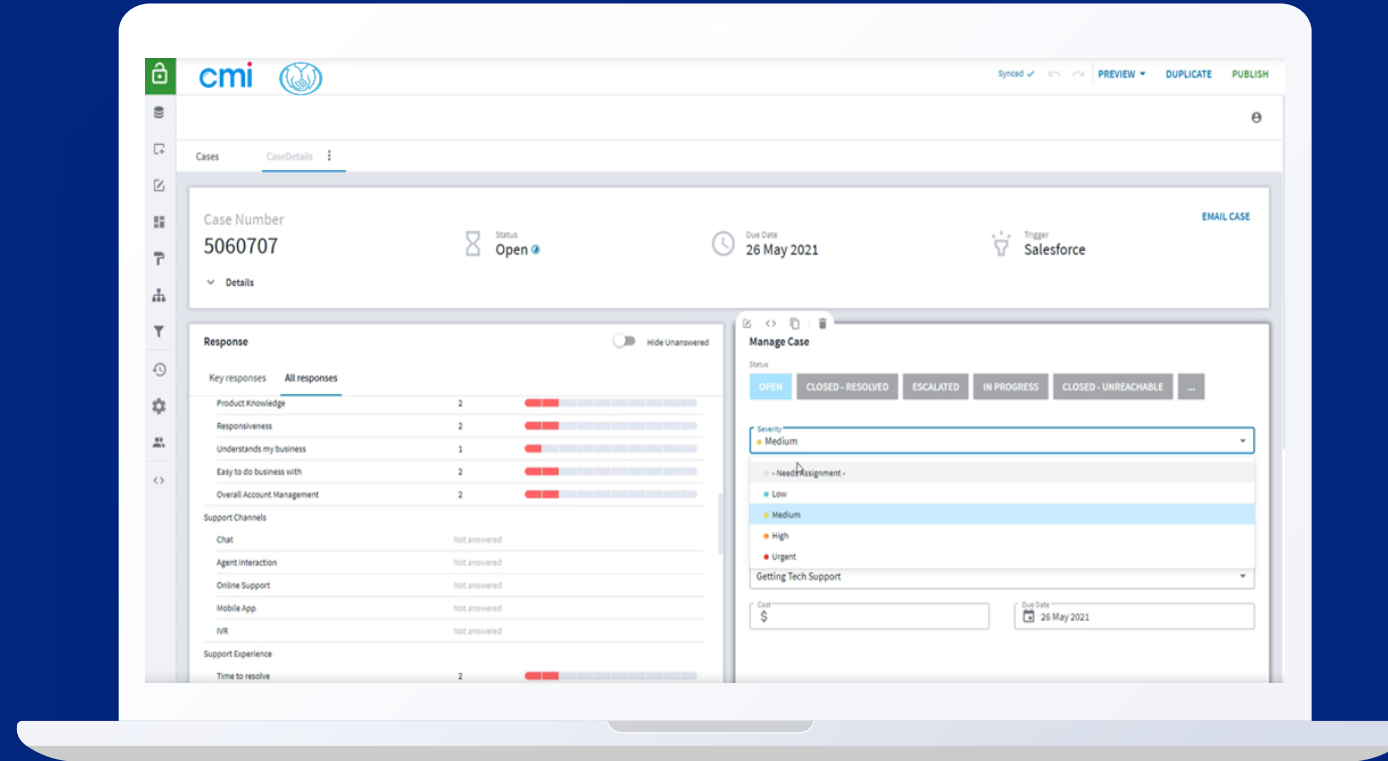


# CMI's Standard Closed Loop System



# Standard Closed-Loop Feedback

- ✓ Whitelisted domain
- ✓ Customizable user roles
- ✓ Predefined workflows empower your staff to take the best course of action
- ✓ Powerful search capabilities
- ✓ Wide range of case filters
- ✓ Easy-to-use email templates with HTML editor enabled
- ✓ Custom alert notifications
- ✓ Easy to setup hierarchies
- ✓ Best pairing option with 'Standard Dashboard'



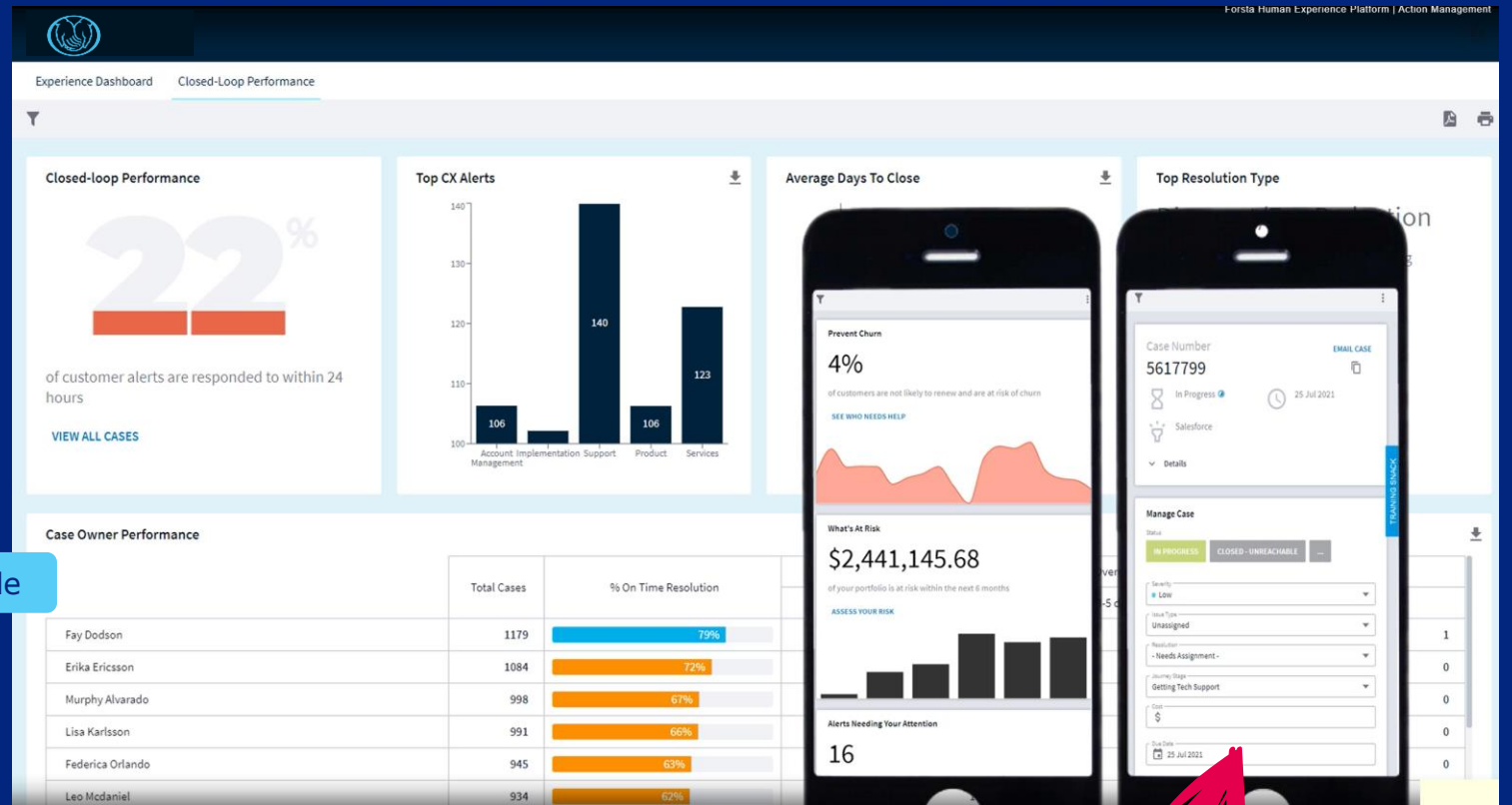
# Desktop and Mobile Optimized

Dashboard interface to keep you up-to-date

At-a-glance case management overview

Reporting optimized for desktop and mobile

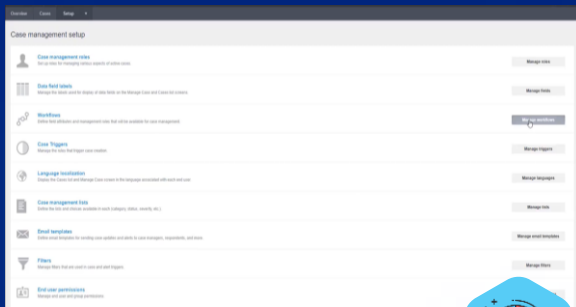
Case management action optimized for desktop and mobile



Mobile-Responsive Design

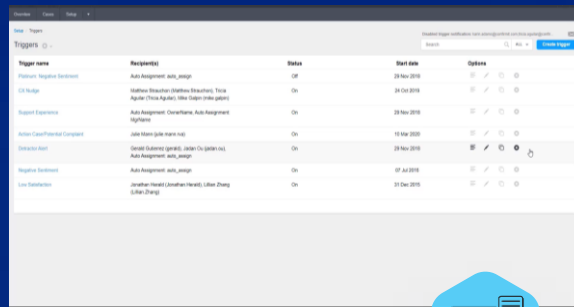
# Easily Adjustable Settings & Triggers

Manage customer cases in an **easy-to-use environment**



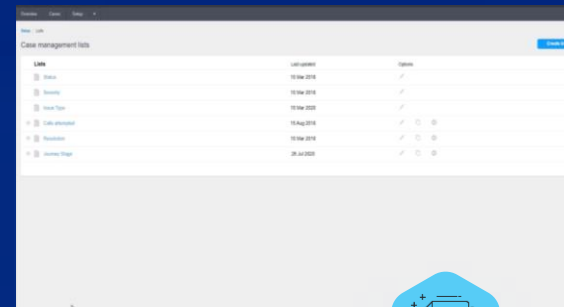
## CLF Setup

Easy to setup and adjust on the fly as business needs changes



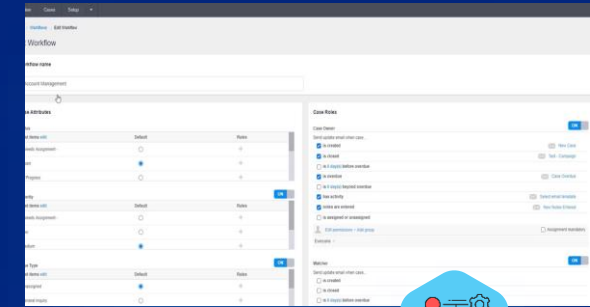
## Alerts

Logic based triggered alerts that can be set within surveys and within the CLF system



## Case Types

Setup as many case types as desired. By delineating the case types, unique workflows can be created as well as predictive analytics.



## Workflows

Highly configurable workflows empower teams and users to act quickly to resolve the case.

