Analyzing the Role of Sales force Experience Cloud in Enhancing Customer Satisfaction through Customer Service Travel Portal

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ABSTRACT

In this work, Enhancing Customer Satisfaction is carried out through Customer Service Portal, an experience cloud site. Salesforce's customer service template provides an efficient way to create a customer service experience site that is specifically built to solve the queries of travellers. This site consists of knowledge articles on bookings, check in/checkout policies, customer services, discounts, invoices, and policies. Additionally, the site has a case creation feature that allows customers to create cases, which are automatically assigned to the service team of the business. This research paper explores the development, implementation, and evaluation of a customer service experience site created through Salesforce's customer service template. The paper provides a detailed description of the site's functionality, including the case creation feature, which streamlines the communication process between customers and the service team. The paper includes a literature review, which highlights the importance of customer service in the travel industry, and the potential benefits of using a customer service experience site. The research paper includes a methodology section, which outlines the process of developing and implementing the site. The paper also includes an evaluation and system analysis section, which assesses the effectiveness and efficiency of the site.

Key words: Customer service, Salesforce, Experience site, Knowledge articles, Case creation, Travel industry.

INTRODUCTION

Effective customer service involves listening to customers, understanding their needs and preferences, and providing prompt and personalized assistance. It is a critical component of building and maintaining strong relationships with customers and can help to improve customer loyalty, retention, and satisfaction. Salesforce [1] is one such powerful platform organizations that deliver exceptional customer experiences and build strong automation rules to streamline their processes and ensure that cases are handled quickly and effectively. Flows in Salesforce are a powerful tool for automating business relationships. Salesforce allows customer service teams to create flows and processes custom for customer service that provides a wide range of tools and features to help and guiding users through complex tasks. They are designed to help organizations build and automate workflows that involve multiple steps, decisions, and user interactions. Flows can be used to automate a wide variety of business processes, including lead qualification, opportunity management, case resolution, and more.

They can also be used to create custom user interfaces and automate complex processes that involve multiple objects, such as creating related records, updating fields, and sending notifications. Salesforce provides a knowledge base that allows customer service teams to store and access information on common customer issues. Knowledge articles are resources within Salesforce that provide a centralized location for storing and sharing information related to a company's products, services, or processes. They can be used to document common issues, best practices, procedures, and other information that is valuable for employees, customers, or partner. Knowledge articles can be created and managed by authorized users within the Salesforce platform, and can be organized into categories and subcategories for easy access and searchability. They can also be shared with internal teams, external partners, or customers through a variety of channels, including self-service portals, email, or social media. Knowledge articles are designed to be easily updated and maintained, and can be enhanced with multimedia content such as images, videos, or links to external resources. They can also be linked to other Salesforce objects such as cases, leads, or opportunities, providing a seamless integration between knowledge management and other key business processes. Knowledge articles can help organizations improve their customer service and support, increase employee productivity and efficiency, and drive overall business success by providing accurate, up-to-date, and easily accessible information and this can help to improve response times, accuracy, and consistency in customer service interactions. Salesforce provides powerful analytics and reporting tools that allow customer service teams

to track and measure key metrics such as customer satisfaction, response time, and resolution rates. This can help teams to identify areas for improvement and continuously improve their performance. Overall, Salesforce is good for customer service because it provides a range of tools and features that can help customer service teams to work more efficiently and effectively, deliver exceptional customer experiences, and build strong customer relationships.

This customer service portal is designed based on a use case where a travel company wants to improves the customer relationships and decrease service costs by letting customers work in the portal, post questions to the community, search for and view common issues and resolutions, knowledge guides, collaborate, and can also create cases.

The travel sector is extremely competitive, and like other industries, offering top-notch customer service is crucial for any firm to succeed. Travelers expect high-quality service from the moment they start planning their trip to the time they return home [2]. The emergence of technology has made it easier for customers to access information and communicate with service providers. One such technology is Salesforce Experience Cloud [3], which enables businesses to build customer service portals that provide customers with access to knowledge articles, support resources, and case creation functionality. Customer service is a key factor in attracting and retaining customers. Providing timely and accurate information, addressing customer concerns, and resolving issues quickly are essential for building trust and loyalty with customers. In recent years, technology has played a significant role in enhancing customer service in the travel industry. Customer service portals, which provide customers with self-service options and easy access to information, have become increasingly popular. Salesforce Experience Site is a platform that enables businesses to create customized portals for their customers [4]. This research paper describes the development and implementation of a customer service portal using Salesforce Experience Site for solving the queries of customers.

LITERATURE REVIEW

The use of customer service experience sites is becoming increasingly popular among businesses to provide efficient and effective customer service. The related research work done in Automation, databases, Knowledge based systems gives the insight that how using salesforce the customers can get better service management [5]. On the other hand, this research paper focuses on the development or the implementation of an experience site for travellers using Salesforce's customer service template. The site aims to provide solutions to travellers' queries and concerns and focusses on how the customers can

make use of knowledge base and a case creation feature.

Salesforce is one of the leading providers of customer service experience sites, offering pre-built templates and components that can be customized to meet the needs of different businesses. In this literature review, we will examine the existing research on customer service experience sites, focusing on the benefits of using Sales force customer service templates.

According to a study by Forrester Research [6], 72% of customers expect a company's website to have a self-service option for handling their queries and issues. This highlights the importance of having a customer service experience site that provides users with access to knowledge articles and a case creation process. By providing self-service options, businesses can reduce the workload on their service teams, allowing them to focus on more complex queries and issues.

Salesforce customer service templates provide businesses with pre-built components and configurations, allowing them to create a customer service experience site quickly and easily. This reduces the time and cost associated with building a custom site from scratch. Additionally, Salesforce provides ongoing support and updates for their templates, ensuring that businesses always have access to the latest features and capabilities. In a study by Nucleus Research, it was found that businesses that use Salesforce customer service templates can achieve a return on investment (ROI) of up to 500% [7]. This is due to the efficiency and effectiveness of the customer service experience site, which reduces the workload on service teams and increases customer satisfaction.

One of the key benefits of using a Salesforce customer service template is the integration with other Salesforce systems, such as the account and contact management systems. This ensures that customer data is accurate and consistent across all systems, reducing the risk of errors and improving the overall customer experience.

Another benefit of using a Salesforce customer service template is the ability to customize the site to meet the specific needs of the business. This includes customizing the user interface, creating custom pages for different types of content, and configuring the case creation process. This allows businesses to provide a personalized customer service experience that meets the unique needs of their customers.

Some of the key points include:

A. Travel Industry and Customer Service
The travel industry is a highly competitive sector that requires businesses to provide excellent customer

service to maintain customer loyalty and satisfaction. In a similar study by Ali and Park (2016) [8], the authors noted that customer service is a critical factor in the travel industry, and businesses that provide excellent customer service tend to have higher customer satisfaction levels. Another important aspect of customer service in the travel industry is personalization. Customers today expect personalized experiences and tailored recommendations based on their preferences and past behaviour. Travel companies that can leverage data and technology to provide personalized recommendations and offers are more likely to create a positive customer experience and drive customer loyalty. Overall, customer service is a critical component of the travel industry, and companies that prioritize it are more likely to succeed in an increasingly competitive marketplace. By providing exceptional customer service, travel companies can differentiate themselves from their competitors, build strong relationships with customers, and ultimately drive business growth.

B. Customer Service Portals and Customer Satisfaction

A customer service portal is a digital platform that provides customers with access to information, support resources, and case creation functionality. Several studies have shown that customer service portals have a positive impact on customer satisfaction. For instance, a study by Xi and Hu (2018) [9] found that customers who used a customer service portal had higher satisfaction levels than those who used traditional customer service channels. Similarly, a study by Yoon and Chung (2015) [10] showed that customer service portals have a positive impact on customer loyalty and retention. The customer service portal also provides a range of tools to help organizations manage customer support cases more efficiently. For example, customers can submit support requests directly through the portal, and these requests can be automatically routed to the appropriate support team for resolution. The portal can also provide customers with real- time updates on the status of their support cases, and allow them to communicate directly with the support team through a chat or messaging feature.

C. Salesforce Experience Site

Salesforce Experience Site is a platform that enables businesses to build customized websites and portals that are integrated with Salesforce CRM. The platform provides businesses with tools for building customer service portals that provide customers with access to support resources and case creation functionality. Salesforce Experience Site also enables businesses to personalize customer experiences and improve service delivery.

Experience Sites also provide a range of features to help organizations engage with their users, such as personalized content recommendations, targeted promotions, and social media integration. They can also be integrated with other Salesforce tools such as Marketing Cloud and Sales Cloud, which can help organizations to deliver a more seamless and personalized customer experience across all touchpoints.

Overall, the literature suggests that using a Salesforce customer service template to create a customer service experience site can provide numerous benefits for businesses. These benefits include reduced workload on service teams, increased customer satisfaction, a positive ROI, and the ability to provide a personalized customer service experience.

METHODS PROPOSED

The development and implementation of the customer service experience site through Salesforce's customer service template involved the following steps:

1. Creation of Contact: The first step is to create a contact associated with an account and assigning the user with the profile such that they can have the access of the portal. In this method the user will have access to all the features like knowledge articles, posting their queries or creating cases.
2. Enabling guest user: In the Public Access Settings we can edit the Guest User Profile section and click on enabled to allow guest users to access the site. In this portal using audience assignment feature the guest users are restricted to create cases and only have access to knowledge articles.
3. Creation of knowledge articles: Based on the identified requirements, a set of knowledge articles were created that covered various topics such as bookings, check in/check out policies, customer services, discounts, invoices, and policies [11].
4. Development of the customer service experience site: The site was developed using Salesforce's customer service template. The site was designed to be user-friendly and easy to navigate, with a clear focus on solving the queries of travellers.
5. Integration of case creation feature: The case creation feature was integrated into the site using Salesforce's flow builder. The feature allowed customers to create cases, which were automatically assigned to the service team of the business [12].
6. Testing of the site: The site was tested by creating a contact associated with an account and enabling the contact as a customer user. The site was then tested for various scenarios, such as creating cases, accessing knowledge articles, and navigating the site.

7. Evaluation and system analysis: The site was evaluated for its effectiveness and efficiency in solving customer queries and improving service efficiency. System analysis was performed to identify any potential issues or bottlenecks in the system.
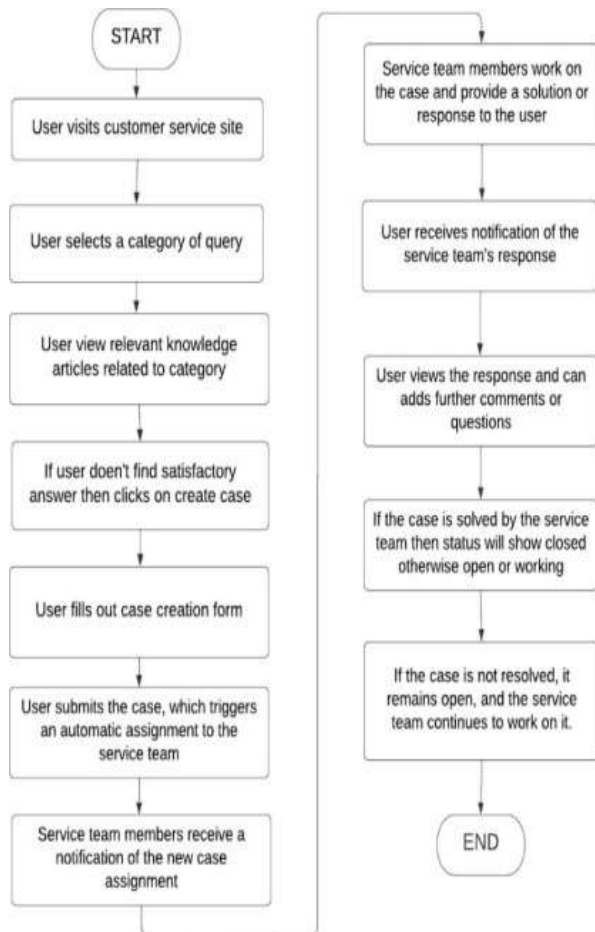
The site when tested proved to be working in an effective manner in solving customer queries. The flowchart depicted in Fig. 1 illustrate the steps involved in the customer service process, from the customer creating a case to the service team receiving the case, to the resolution of the case. The structural chart shows the interface for guest and login user in the portal is depicted in Fig. 2.
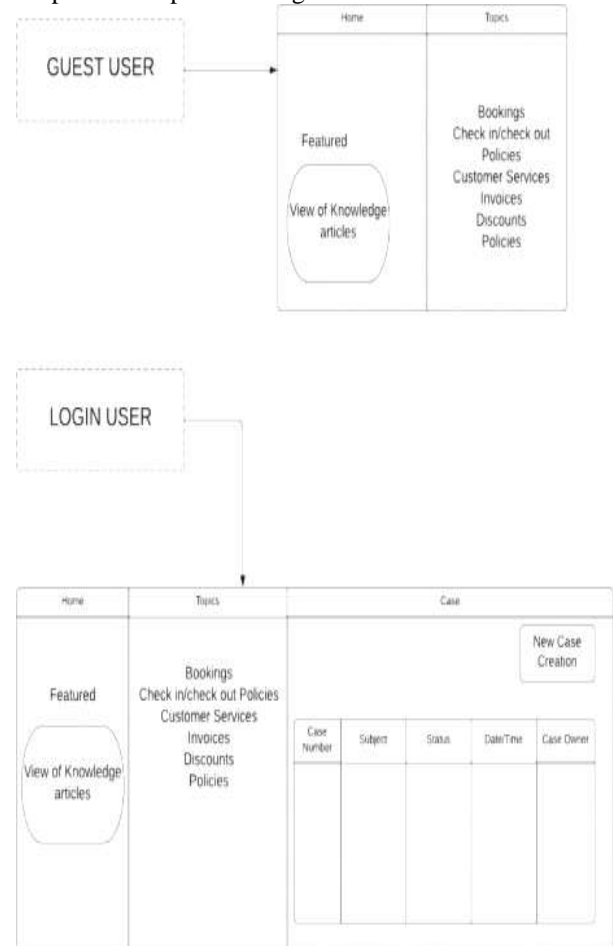

Fig. 1: Flowchart to Depict the Steps Involved In the Customer Service Process

Fig. 2: Structural chart to depict the interface for guest and login user in the porta

EVALUATION AND SYSTEM ANALYSIS

The customer service experience site created through Salesforce's customer service template is designed to provide efficient and effective customer service to travellers. The site includes knowledge articles on various topics, including bookings, check-in/check-out, policies, customer services, discounts, and invoices. It also includes a case creation process, which allows customers to create cases that are automatically assigned to the service team of the business.

In this section, we will evaluate the effectiveness of this system and analyse its components.

Effective Evaluation

The effectiveness of the customer service experience site can be evaluated based on its ability to meet the following objectives:

Provide easy access to information: The knowledge articles available on the site should be easily accessible and provide clear and concise information to customers.

Efficient case management: The case creation process should be easy to use and efficient in assigning cases to the service team.

Personalized experience: The site should provide a personalized experience to customers based on their preferences and needs.

Objectives that the portal is achieving:-

a) The Knowledge articles will be easily accessible to the customers when the user logs in to the portal.
b) The Case that is created by the customer is directly assigned to the service team with the help of salesforce flow builder. One more flow is created to send notification to all the team members of the Service team.
c) A Report given in Fig. 3. depicts the cases that are created through customer service portal along with the status of the cases that are opened and closed which is helpful for the business to keep the track of the cases.

Case Owner	Account Name	Subject	Date/Time Opened	Open	Closed
Service Team	Customer Service Portal Account	How can I request additional services or amenities?	01/05/2023, 12:10 pm	☑	☐
Service Team	Customer Service Portal Account	Regarding Services	29/04/2023, 5:09 pm	☑	☐
Service Team	Customer Service Portal Account	How can I view or download my invoice?	01/05/2023, 12:10 pm	☑	☐
Service Team	Customer Service Portal Account	How can I apply discounts or promotional codes to my booking?	01/05/2023, 12:10 pm	☑	☐
Service Team	Customer Service Portal Account	What are the policies for refunds or compensation?	01/05/2023, 12:08 pm	☐	☑
Service Team	Customer Service Portal Account	How can I make a booking?	01/05/2023, 12:09 pm	☐	☑
Service Team	Customer Service Portal Account	What are the check-in and check-out policies?	01/05/2023, 12:09 pm	☐	☑

Fig. 3 Report of Cases Generated by the Customers

SYSTEM ANALYSIS

The customer service experience site created through Salesforce's customer service template consists of the following components:

Knowledge articles: The site includes knowledge articles on various topics including bookings, check-in/check-out policies, customer services, discounts, and invoices. These articles are created and managed through Sales force's knowledge management system.

Case creation: The site allows customers to create cases, which are automatically assigned to the service team of the business. The case creation process is managed through Salesforce's flow builder and can be customized to meet the specific needs of the business.

Integration with Salesforce systems: The customer service experience site is integrated with other Salesforce systems, such as the account and contact management systems. This ensures that customer data is accurate and consistent across all systems [13].

Customization: The site can be customized to meet the specific needs of the business, including the user interface, custom pages, and the case creation process.

Based on the system analysis, it can be concluded that the customer service experience site created through Salesforce's customer service template is a comprehensive system that provides efficient and effective customer service to customers.

The integration with other Salesforce systems ensures that customer data is accurate and consistent, and the customization options provide businesses with the flexibility to meet the unique needs of their customers.

DISCUSSION AND CONCLUSION

The study evaluated the effectiveness of a customer service portal built using Salesforce Experience Site for travellers and provided an efficient means of handling customer inquiries and issues. The results showed that the portal had a positive impact on customer satisfaction.

The study supports the use of customer service portals in the travel industry as a means of improving customer experience and satisfaction. The study recommends that travel businesses consider investing in customer service portals to improve their customer service processes and increase customer satisfaction.

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