

Service Cloud Macro Design

Improve case resolution time and agent productivity.

Reduce clicks and streamline series of tasks for service agents. The Service Cloud Macro Design Accelerator will help minimize data entry errors and enable agents to execute repetitive tasks by defining macros for the most common use cases.

What it can do for you

Empower agents to perform multiple actions in one click, leading to:

- Shorter time to close cases
- Execute sequences of routine actions in fewer clicks
- Increase in number of cases an agent can process
- Increased consistency through automation of manual processes

How it works

Certified Specialists will guide you through the process over a predetermined timeframe (typically 3–4 weeks):

Discovery

- Analyze the provided use cases and key data required to resolve cases
- Identify use cases suitable for macros
- Identify additional use cases

Analysis

- Within Service Cloud in a sandbox environment utilizing existing components
- Macros technical configurations
- Additional potential use cases
- Best practices

Outcomes

- Confirm achievement of success criteria

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ACCELERATOR COST

5 POINTS

GOAL

Reduce costs.

INTENDED USER

You are a manager or supervisor that needs help configuring macros within Salesforce Console for Service Agents.

PREREQUISITES

- Service Cloud licenses purchased and assigned to users
- Service leader engaged and committed to the outcome, along with Salesforce admin and service team members
- Access to sandbox org to configure macros
- Salesforce Console for Service Cloud currently in use

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Learn how we can help you accelerate your CRM success.

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