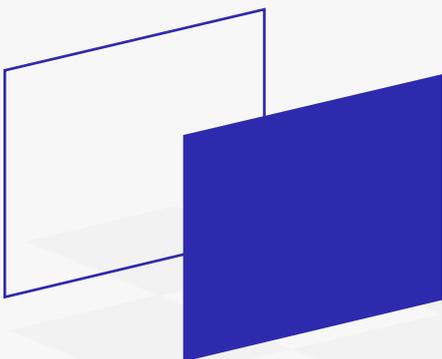


Success Story

Salesforce Email-to-Case and Einstein Copilot: Innovating Customer Interaction with Sentiment Analysis



Objective

A leading Insurer's customer support team faced challenges in managing and responding to a high volume of emails. They required expert consultation and implementation services for an integrated platform, so they reached out to Exavalu.

Challenges

- **Delayed Response Times:** Manual processing of emails led to higher response times due to consolidation and summarization of information.
- **Inconsistent Quality:** Responses varied in verbiage and tone, affecting customer satisfaction.
- **Sentiment Analysis:** Difficulty in accurately gauging customer sentiment from emails due to manual interpretation.



How Exavalu Drove Change

Our solution leveraged **Salesforce Email-to-Case service, integrated with the GenAI capabilities of Einstein Copilot to perform sentiment analysis and generate automated responses.** The key components of the solution include:

- **Email-to-Case Service:** Automatically logs incoming customer emails as cases in Salesforce.
- **Sentiment Analysis:** Einstein Copilot analyzes the sentiment of each email and categorizes it as “satisfied”, “dissatisfied” or “neutral”.
- **Automated Responses:** Based on the sentiment analysis, Einstein Copilot generates a customized response, which focuses on converting the sentiment quotient to “satisfied”, and sends the email as per preferences set for the customer.
- **Agent Involvement:** Customer Service Agents can review and modify the responses generated, adding their expertise before sending the final reply.

Tech Stack

Salesforce Sales Cloud, ChatGPT/Einstein GPT

Benefits

Salesforce Email-to-Case coupled with Einstein Copilot led to higher productivity and responsive customer service:

- **Improved Response Times:** Automated logging and initial responses reduced average response time with higher FCR.
- **Consistent Responses:** Sentiment-based responses ensured a more consistent and appropriate tone in agent responses.
- **Enhanced Customer Satisfaction:** Faster and more accurate responses led to higher CSAT and stronger customer retention.
- **Efficient Case Management:** Customer Service Agents could focus on more complex issues, improving overall efficiency.