



SIMPLUS
an Infosys company

CUSTOMER SUCCESS STORY





ABOUT THE CLIENT

The client is a leader in technology solution brokerage, from cloud voice to IoT providers and more. As one of the largest privately held technology services in the United States, the client's services span a range from quote management and sales engineering to supplier management and cybersecurity solutions.

EXECUTIVE SUMMARY

The client is partnering with Simplus to leverage Agentforce to automate both internal user and external partner business processes for driving revenue. The Agentforce solution automates time-consuming processes, enabling partners and internal support agents to focus their time on higher-value activities.

THE CHALLENGE

The client reached out to Simplus to help drive down costs within their customer support function and optimize efficiencies with staffing management and agent turnover. With high-volume, low-value tickets and support requests coming in daily, the client's support teams were experiencing unnecessarily increased workload and downstream delays on supporting their sales partners, impacting relationships and revenue.

The client wanted to explore leveraging Agentforce to:

1. Enable their internal support agents to have a more balanced workload, with the ability to focus on higher-priority activities
2. Provide external partner sales users with trusted artificial intelligence tools that could make them more productive and reduce multi-step processes causing their role to be cumbersome

The client support agents spend significant time on supporting Partner interactions and relationship management around:

- Validating that partners were paid appropriately
- Helping commission team users answer commissions and order questions
- Helping finance users answer commissions related questions
- Validating Partner payments, monthly deltas, total commissions, and previous month's payments
- Identifying and reconciling partner payment issues
- Assisting with order activation and installation requests



- Gathering, consolidating, and sharing details with partner users around:
 - » Account and Order details
 - » Commission and payment updates
 - » Open Quotes
 - » Supplier contacts, and more

HOW SIMPLUS HELPED

Simplex worked hand-in-hand with the client to define actionable use cases, leveraging the power of Infosys's Salesforce Innovation Labs to design and build a high-value Agentforce experience.

Over the course of only a few weeks, a lightweight team of Simplex technical resources and subject matter experts built and tested a working solution. The solution automated high-value challenging and time-consuming processes while ensuring data security was upheld.

Partners of the client can interact with Agentforce directly on their Experience Site to independently retrieve data, resolve their own inquiries, and execute tasks. Multi-step processes are consolidated into a secure, conversational dialogue, without having to escalate to a the client Support Agent.

