



## CASE ORCHESTRATOR

**An AI-driven case management tool for Salesforce, streamlining service teams' workflow from case creation to resolution.**

Case Orchestrator is a powerful, AI-enhanced case management solution for Salesforce. It automates the flow of cases through a service team, from creation, through triage and enrichment, to assignment and resolution. Case Orchestrator determines the most efficient path for every individual case, and proposes the most effective means to bring it to a successful resolution. It empowers managers, ensuring that the right case is always enriched with the right data, presented in the right place, to the right agent (human or otherwise), at the right time. Case Orchestrator revolutionizes productivity and can transform any service team into a high-performance team.

**Datasheet**

**Version 1.0**

### KEY FEATURES



#### Email Triage and Categorization:

Case Orchestrator analyzes and categorizes inbound case emails based on content, sender, urgency etc



#### Create cases automatically

Initiation of a case when a customer case email arrives, web form submission, or any other source



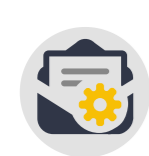
#### Update cases automatically

Route subsequent case emails to the same case record, extract pertinent data, and update fields automatically



#### SLA Monitoring

Deploy AI-powered tracking and management of SLAs, with alerts for cases at risk of breaching agreements



#### Case Triage and Categorization

Analyze every new case, categorize it and determine next best action



#### Case Enrichment

The case is enhanced with additional relevant information for a more comprehensive understanding



#### Prioritization

Priority level marked on each case, automatically, based on urgency, importance, and other relevant factors



#### Sentiment Analysis

The tone and urgency of the case are assessed to further refine its prioritization and handling



#### Case Deflection

Suitable cases are directed towards trained chatbots or other self-help options for quick resolution



#### Intelligent Case Assignment

Each case is assigned dynamically to best service agent based on skills, experience, workload & availability



#### Automated Reassignment

If an agent is overloaded or out-of-office, or a case needs specialist intervention, it can be reassigned automatically



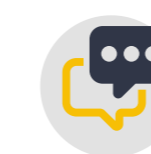
#### Post-Assignment Automations:

Once assigned, specific, tailored actions are triggered, e.g. follow-up emails, creating tasks, or re-assignment



#### Agent Notification and Response:

Real-time notifications, via email, Slack, Teams, SMS or other, keep agents informed on alerts and updates



#### Resolution and Feedback:

Once the case is resolved, feedback is collected to assess customer satisfaction and service quality



## BENEFITS

### Enhanced Efficiency and Productivity

Automates and streamlines the entire case management process, significantly reducing manual effort and speeding up case resolution times.

### Intelligent Case Prioritization

AI-driven algorithms analyze and prioritize cases based on urgency and importance, ensuring that critical issues are addressed promptly.

### Increased Operational Agility

Adaptability to handle a wide range of scenarios across different industries, enhancing the team's ability to respond to changing needs effectively.

### Automated Follow-Ups and Reassignments

Ensures no case is overlooked by automating follow-ups and reassigning cases as needed, especially in instances where the original agent is unavailable.

### Seamless Integration with Existing Systems

Easily integrates with existing Salesforce environments, ensuring a smooth implementation and minimal disruption to current workflows.

### Improved Customer Satisfaction

Ensures quick, accurate, and personalized responses to customer inquiries, leading to increased customer loyalty and satisfaction.

### Data-Driven Insights

Provides valuable insights through comprehensive data analysis, enabling better decision-making and continuous process improvement.

### Optimized Workload Management

Dynamically assigns cases to the most suitable service agents based on their current workload, expertise, and availability, promoting balanced work distribution.

### Comprehensive Feedback Mechanism

Collects and analyzes feedback post-resolution, offering insights into service quality and areas for improvement.

### Scalability and Customization

Offers scalable solutions that can be customized according to specific business needs and changing operational demands.

## USE CASES

### Customer Service and Field Service Teams

Case Orchestrator is an invaluable tool for customer service and Field Service departments across various industries. When a customer inquiry or complaint is received via email or web form, the system automatically creates a case, enriching it with the customer's previous interaction history and other relevant data. It then categorizes the case based on its content and urgency. The AI assistant can reach out for additional information if required, ensuring that each case is thoroughly understood before being assigned. The case is then assigned to the most suitable service agent based on their skills, experience, and current workload, ensuring efficient and effective resolution.

### IT Support and Incident Management

IT departments can leverage Case Orchestrator for managing support tickets and technical issues. The system categorizes incoming issues based on severity and type, prioritizes them, and assigns them to the appropriate IT support staff. This process ensures prompt responses to critical issues like system outages, improving overall IT support efficiency.

### Manufacturing Warranty and Service Requests

Manufacturing companies can deploy Case Orchestrator to efficiently manage warranty claims and service requests. The system automatically categorizes cases based on product type, warranty status, and customer history, directing them to the appropriate service team for a faster and more accurate response.

### Healthcare Patient Support

Healthcare providers can utilize Case Orchestrator to streamline the handling of patient inquiries, appointment requests, and follow-up communication. It automatically categorizes and prioritizes patient cases, ensuring that urgent requests, such as prescription refills or appointment scheduling, are promptly addressed, thereby enhancing patient care and administrative efficiency.

### Educational Institutions' Student and Faculty Support

Educational institutions can use Case Orchestrator to handle a range of inquiries from students and faculty. From admission queries to administrative requests, the system intelligently categorizes and assigns cases to the relevant department, improving response times and the overall support experience for both students and faculty.

**For further information please contact  
one of our Salesforce Automation Specialists**

Sales Enquiries: [sales@ortooapps.com](mailto:sales@ortooapps.com)

Technical Enquiries: [support@ortooapps.com](mailto:support@ortooapps.com)

Call: 44 (0) 20 3111 1323

**[ortooapps.com](https://ortooapps.com)**

