

CASE STUDY



ENHANCING CUSTOMER SUPPORT WITH SALESFORCE KNOWLEDGE IMPLEMENTATION

Industry: B2B MSP

Solution: Salesforce Knowledge Implementation

CHALLENGE

The client's support teams lacked a centralised knowledge base to store and access critical support documentation. Existing resources were scattered across different systems, making it difficult for agents to quickly locate information during case resolution. This often led to longer handling times, inconsistent responses, and missed opportunities for customer self-service. Without a structured knowledge management system, both agent productivity and customer satisfaction were impacted.



SOLUTION

We implemented Salesforce Knowledge and migrated over 200 knowledge articles into the platform. Multiple record types were created to structure content into categories such as FAQs, How-To guides, Troubleshooting, and Installation guides, ensuring easy navigation and relevance. Articles suggestions based on certain fields from support cases were enabled, helping agents to provide accurate resolutions faster. To balance efficiency with governance, certain articles were marked as private for internal use only, while others were made public to empower customers to self-serve and resolve common issues without contacting support.

OBJECTIVES

The objective was to implement Salesforce Knowledge to centralise and structure all support content, ensuring that agents could access relevant articles directly within Salesforce. The solution needed to streamline case resolution by linking articles to cases, improve consistency in responses, and enable customer self-service by publishing select articles externally. Additionally, governance was required to classify which content remained internal-only and which could be shared with customers.

RESULTS

- Centralised and structured knowledge base with 200+ articles migrated
- Faster case resolution as agents could access relevant articles within Salesforce
- Improved consistency and accuracy of responses across the support team
- Enhanced customer experience through self-service with public-facing articles
- Better governance with controlled access to sensitive/internal-only content