Fortune 10 optimizes Salesforce using Fullstory Workforce

To enhance the customer experience, they recognized the importance of using behavioral data to fine-tune workflows and improve agent productivity. They sought deeper insights into how their call center agents navigated their primary customer support tool to optimize support processes, reduce inefficiencies, and create a smoother overall experience.

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> *With Workforce, resolution time for technical issues affecting agents dropped significantly, moving from days to just minutes. This was a huge win for us."*

Director of Partner Channels

The challenge

With the shift to remote work, they faced a critical challenge: a lack of visibility into agent activity within their primary customer support tool. While the tool was integral to their operations, there was no way to monitor how agents were using it or identify areas where things were going off track.

Existing tools, like screen recording, couldn't provide the needed insights. They raised privacy concerns and left key behavioral data untapped. What they needed was a solution that could deliver detailed insights into agent behavior without compromising privacy. Additionally, agents bypassed prescribed workflows, which made it harder to identify inefficiencies.

Compounding the issue, troubleshooting technical problems required long sessions that delayed ticket resolutions. The team needed a way to eliminate these bottlenecks and gain real-time insights to improve workflows and support efficiency.

The solution

To tackle these challenges, they implemented Fullstory's Workforce in a strategic, step-by-step manner:

1. **Pinpointing areas for visibility:** They started by targeting specific URLs with Workforce to gain better visibility into agent interactions and workflows. This was a crucial first step to ensure the right activities were being monitored without breaching privacy concerns.

2. **Addressing privacy concerns:** By focusing on URL-specific tracking, Workforce allowed them to monitor agent behavior while respecting privacy boundaries. This was a key differentiator from other solutions that recorded entire screens, raising privacy red flags.

3. **Understanding agent behavior:** Workforce provided insights into how agents navigated their support tool, identifying where agents deviated from prescribed workflows. This helped them pinpoint inefficiencies and streamline processes.

4. **Reducing troubleshooting time:** One of the main pain points they experienced was the time-consuming process of resolving technical issues. Workforce eliminated the need for screen-sharing sessions, reducing resolution times from days to minutes.

Results that matter

With a clearer view into agent activity, they were able to identify where agents deviated from their standard practice, which led to immediate process corrections. This visibility streamlined workflows, enhancing operational efficiency across the board.

The most impactful change was in ticket resolution times. Previously, technical issues required long sessions that stretched out for days. With Workforce's detailed insights, these troubleshooting sessions were reduced to minutes, drastically improving overall efficiency.

Agent productivity also received a boost. By gaining deeper visibility into workflows, they fine-tuned processes to reduce unnecessary steps, allowing agents to focus on their core tasks.

Ultimately, these efficiencies led to a better customer experience. Faster resolutions and more optimized workflows meant customers got the support they needed, when they needed it, with minimal friction.

Looking ahead

They are continuing to expand the use of Workforce by integrating it with tool actions and incorporating call recordings for a comprehensive view of agent interactions. This ongoing optimization ensures that they stay ahead of any inefficiencies, guaranteeing continued success in delivering a top-tier customer experience.