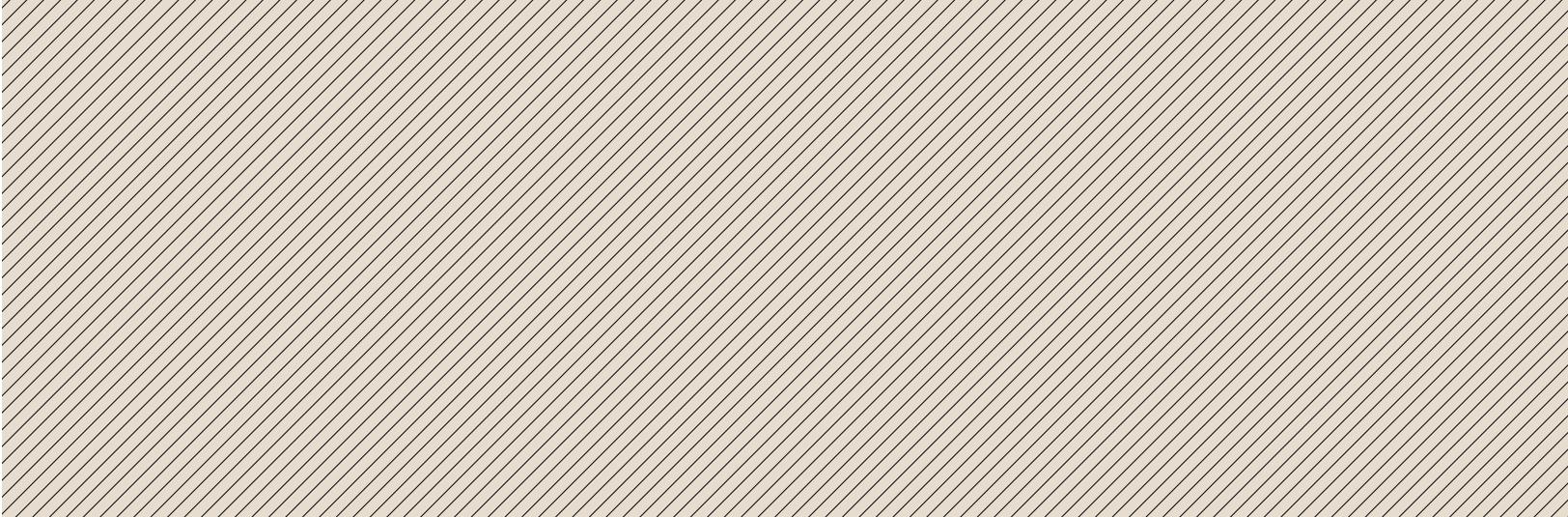


PagerDuty

Work where
you are:

PagerDuty + Salesforce Service Cloud



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Customer service in an always-on world

The way organizations interact with customers has fundamentally changed over the last decade as more and more people are online and e-commerce is projected to make up 24.5% of global retail sales by 2025. With so much reliance on the internet for everyday purchase of goods and services, businesses must be present 24/7/365 to provide the best service and keep customers engaged. However, not every business is ready and able to meet the challenge of being “always-on”:

- 51% of companies are finding out about technical issues directly from customers themselves
- 83% of those companies report that major technical issues lead to extra unplanned work for Customer Service agents
- 71% report unhappy customers
- 90% of companies use little to no automation for technology issue resolution¹

Contributing to these issues are budget constraints, legacy technology solutions, limited personnel, and siloed operations. These all hamper the ability for businesses to resolve customer impacting issues quickly, leading to dissatisfied customers and overworked customer service teams.

In this “always-on” world, service-disrupting incidents can happen at any time and any impact to the customer means lost revenue, decreased brand opinion, and reduced likelihood of repeat business, making it imperative to resolve issues as soon as possible. When incidents do occur, customer service (CS) teams are the first line of defense to minimize customer impact by providing context for customers and suggesting workarounds until the issue is fixed. However, without visibility into the incident from start to finish, CS agents are cut off from the response process and can't communicate updates to the customers as needed.

Traditionally, when a customer case is opened, the CS agent passes the information along to the team that can solve the issue. However, since most organizations use a disjointed and siloed set of tools to track and resolve issues, the visibility into the progress of the resolution is limited. Teams on different sides of the business should be working together to solve customer issues, however, instead there is friction throughout the communication process. Once the issue is resolved, the lack of a cohesive tracking system makes it labor intensive for the CS agent to follow up and close the loop with the customer, creating a delay in communication that opens the door to an unsatisfying customer experience.

From a wider organizational view, issues escalated from CS agents often require the help of back-end engineering teams to resolve. As they divert their attention toward troubleshooting issues, their own business-critical projects are interrupted. The more these incidents continue to require engineering expertise to solve, the greater the delays to their development efforts.

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¹ [E-commerce share of total retail sales | Statista](#)



PagerDuty and Salesforce: A fully integrated solution

Together, PagerDuty + Salesforce Service Cloud empower customer service teams to resolve customer issues quickly with a full set of tools that integrate seamlessly with their current ticketing system. PagerDuty serves as the conduit for information flow and orchestration between different parts of the business, enabling front-facing CS teams to have the same visibility into incidents as back-office developers and ITOps personnel. With this increased visibility, teams across the organization have a deeper understanding of what incidents are happening. This helps everyone from sales and CS to ITOps and the executive team see how the incident is being resolved, and how the customer is impacted and communicated with.

PagerDuty acts as the central nervous system for the entire tech stack, while fully integrated with Salesforce and all the customer data it contains. CS agents are empowered to take full ownership of customer inquiries related to an incident without leaving the PagerDuty dashboard inside of Salesforce. With all of the necessary tools in one place, incidents can be tracked and escalated easily without context switching.

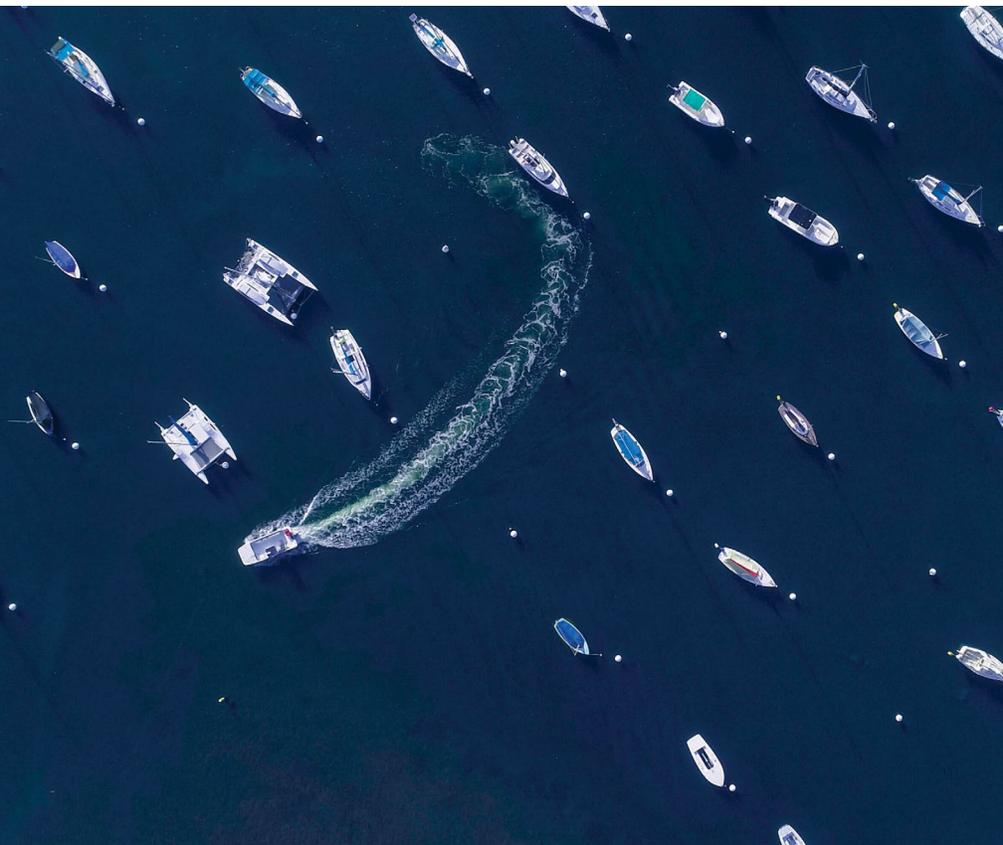
PagerDuty enables real-time work with complete visibility across the entire hybrid cloud infrastructure, eliminating blind spots and the unforeseen issues they can cause. When incidents do arise, CS agents can act proactively by alerting the appropriate teams. Moreover, as the integration deepens, it bidirectionally integrates PagerDuty incidents with Service Cloud incidents. On top of the ability to keep stakeholders informed and updated, it provides agents with the ability to link a PagerDuty Incident to a Salesforce Incident. This keeps incidents in both PagerDuty and Salesforce in sync and up-to-date.

CS and development teams alike can take the data gained from each incident and link similar incidents and reports of the same issue to one another. This empowers teams to spot trends or emerging issues that should be addressed before they become problematic.

Breaking down silos to gain visibility

Customer satisfaction, company-wide innovation, and the bottom line are all impacted when teams are siloed from one another. These teams have historically used different tools and processes that hinder communication, collaboration, and innovation.

PagerDuty + Salesforce Service Cloud builds bridges between teams to speed incident resolution and keep customers happy with complete visibility from beginning to end of each ticket, regardless of who is working on it. Bidirectional integration allows communication and data to flow freely between customer service agents and the engineers working to resolve the issue. With information visible across the organization, resolutions happen more quickly, the customer stays informed, and the incident-related details are available afterward for analysis.



Speed up resolutions with technology

From reactive to proactive

Automation is a key component in delivering first-rate customer service and is shown to reduce employee stress by more than 20%. A key benefit of automation is that it empowers customer service teams to own customer cases from first report to close. Agents have real-time visibility, context, and the direct ability to mobilize the right technical and operational teams to solve customer issues, all while proactively communicating with customers. CS teams always have the necessary tools and information to get their jobs done quickly and efficiently, enabling them to transition from being reactive to being proactive. Additionally, engineering teams are only pulled in when absolutely needed, so they have more time to work on their own projects.

Automated responses, faster resolutions

51% of the time, customers are surfacing issues before engineering teams are aware. Customer service teams can now use automation to confirm these cases and escalate as needed to help the DevOps engineering teams diagnose and resolve them. CS agents are empowered to validate customer issues and triage them appropriately. Not only does this reduce time-to-resolution, but it also results in fewer escalations to back-end teams. If the issue is critical and demands immediate attention and assistance from development teams, a CS agent can run automation actions directly from the PagerDuty app in Service Cloud. Automation can be used to kick off diagnostic and remediation scripts. Automation can also be used to perform pre-documented steps, including sending automated communications, validate product information, and updating tickets.

The result? CS teams are empowered to validate customer impacting issues by running automation actions directly from PagerDuty's app in the PagerDuty + Salesforce Service Cloud. Non-urgent incidents (like changing a support URL to reflect a name change) that can be resolved by front line CS teams are solved with them, and those that need more help are quickly routed to the team that can help. CS can include critical customer information to help the resolving team understand the issue. Incident times and customer impact are reduced, while escalations are reduced.

Actionable insights from machine learning

PagerDuty provides the means to gather real-time data from across your entire IT estate. Machine learning (ML) then sifts through all the collected data, eliminates noise, and delivers actionable insights. When analyzed along with data from past incidents, the resulting information can reveal opportunities for improvements in the organization's services and incident response. The outcome is a dramatic reduction of incident resolution times, minimized impact to customers, and enhanced innovation.

Work where you are

Historically, when alerted to a customer-facing incident, customer service agents were sent scrambling to follow all the steps to properly document, triage, escalate, and then respond to the customer. This often meant switching constantly between application windows as agents manually moved information from one context to another. It was an inefficient and error-prone method which created additional complexity that increased work and lengthened incident response times.

Through seamless integration with Salesforce, PagerDuty has eliminated the need for context switching. CS agents now have an all-inclusive toolkit for incident resolution, right where they already work.

This powerful integration



Provides a full view into any incident



Empowers teams to see incident details across the lifecycle across teams



Enables CS agents to link related incidents together and toggle between them



Creates visibility into similar incidents to reveal trends as they emerge



Allows CS agents to acknowledge, accept, and subscribe to an incident, which enables real-time notifications



The result is better visibility between teams, more rapid incident resolution, and less employee effort

Continuously innovate with Salesforce

PagerDuty employs a model of continuous improvement to its Salesforce integration. CS agents can respond quickly to incidents while owning customer cases from end to end, breaking down the silos between teams.



Incident subscription allows CS agents to subscribe to an incident with a single click, enabling real-time updates without additional steps. CS agents can then focus on other cases, knowing that they will be immediately alerted of any changes to the subscribed incident.



Dashboard toggle enables CS agents to use a Status Dashboard that is made just for them. They can view the health of back-end systems and customer-facing systems separately.



Customizing PagerDuty incident titles with Salesforce data empowers all stakeholders and agents to update incidents based on information from the Salesforce case. This makes it easier to link multiple cases to an incident and see as many case-related details as possible without context switching.



Visibility into linked Salesforce Cases in PD Web automatically links and reports on cases related to incidents. This allows everyone across the organization to see how many customers have been impacted by an incident, as well as how many have complained about the disruption.

Be always-on for your customers

To be “always-on” means the customer expects you to be available 24/7, 365. Meeting this demand requires visibility into how incidents are handled throughout their lifecycle, while minimizing the impact to both CS teams and engineering teams.

By empowering teams to easily escalate and solve incidents rapidly, the impact to customers is reduced and internal teams feel their time is valued. With less time spent dealing with incidents, internal teams can focus on tasks with more business and personal value.

The combined power of PagerDuty and Salesforce gives your organization the power of complete visibility.

About PagerDuty

PagerDuty, Inc. (NYSE:PD) is transforming critical work for modern business. Our powerful and unique digital operations platform enables users to take the right action, when seconds matter. Organizations of all sizes trust PagerDuty to handle every type of work across the enterprise including intelligent incident response, AIOps and process automation. Notable customers include Cisco, Genentech, Electronic Arts, Cox Automotive, Shopify, Zoom, DoorDash and more. To learn and to try PagerDuty for free, visit www.pagerduty.com. Follow our [blog](#) and connect with us on [Twitter](#), [LinkedIn](#), [YouTube](#) and [Facebook](#). We're also hiring, visit [our careers page](#) to learn more.

Learn more about PagerDuty and start a free trial at pagerduty.com/freetrial.