Distribution Engine vs. Omni-Channel

...with an honorable mention of
Salesforce Surveys

Compiled by
Svet Voloshin

Omni-Channel: OOTB Salesforce Functionality

What is it?

- Salesforce mechanism to route work requests to the most available and/or qualified support agents or other designated users (e.g. Sales).

Why use it?

- Automation for Case distribution - most common use
- Enhanced supervision features for Call Center managers
- Increased velocity of support operations

How does it work? (high-level)

- Case comes in via whichever way → Case assignment rules run and place it in an appropriate Queue, which becomes a Case Owner → Omni-Channel routes it to an appropriate agent → Agent accepts the Case and becomes its owner → Agent works the Case...

Key Takeaway: a routing is considered complete when a user becomes an owner of a record and is able to do something with that record.

Supported Objects for Omni-Channel:

- **Cases**
- Chats
- Claims
- Claim coverages
- Claim recoveries
- Contact requests
- Incidents
- **Leads**
- Messaging (Lightning Experience only)
- **Orders**
- **Work Orders***
- Payment requests
- Social posts
- SOS video calls (Salesforce Classic only)
- Swarm members
- **Custom objects that don't have a master object**

Queues can own:

- Case
- Contact request
- Custom Objects
- **Leads**
- **Order**
- **Service Request**
- **Task**
- **Work Order**

*Work Orders are now supported as of Summer '23 release.

Business Requirements - Part One (Universal Rollercoasters Mock)

1. In case of any issues with an attraction, ride, shop or personnel, the customers can submit incidents, which are divided by:
    a. Injury: This can be performed via phone call or by using the mobile app, the corresponding operation specialist in first-aid will give it a look, if it can’t be handled by him/her the Private Healthcare will be called.
    b. Ride problem: To report an issue with a ride.
    c. Shop or personnel issue: To report an issue while buying or while being assisted by the park personnel.
2. Injuries should be automatically routed to the closest corresponding first-aid specialist that can assist.

Omni-channel, Distribution Engine or both?

Proposed Solution (Universal Rollercoasters)

1. In case of any issues with an attraction, ride, shop or personnel, the customers can submit incidents, which are divided by:
    a. Injury: This can be performed via phone call or by using the mobile app, the corresponding operation specialist in first-aid will give it a look, if it can't be handled by him/her the Private Healthcare will be called.
        i. **User Svc. Cloud Voice to take and route the call to a Call Center Rep.**
        ii. **Call Center creates case and assigns to a First-Aid queue**
        iii. **First-aid Specialist - public group**
        iv. **Omni-Channel routes case to a First-Aid specialist (queue member)**
        v. **If unable to handle, Private Healthcare is called via Svc. Cloud Voice and case is reassigned to available personnel**
        vi. **Use Mobile Publisher to create a case via standard functionality**
    b. Ride problem: To report an issue with a ride.
        i. **Case record type - likely different layout**
    c. Shop or personnel issue: To report an issue while buying or while being assisted by the park personnel.
        i. **Case record type - likely different layout**
2. Injuries should be automatically routed to the closest corresponding first-aid specialist that can assist.
    a. **Covered above**

Business Requirements - Part Two (FoodForce Mock)

FoodForce wants to automate the process of finding new customers by integrating top-quality prospects and contacts into the system. This will allow them to better manage their growth especially in Europe and the growing Gastro Pub marketplace.

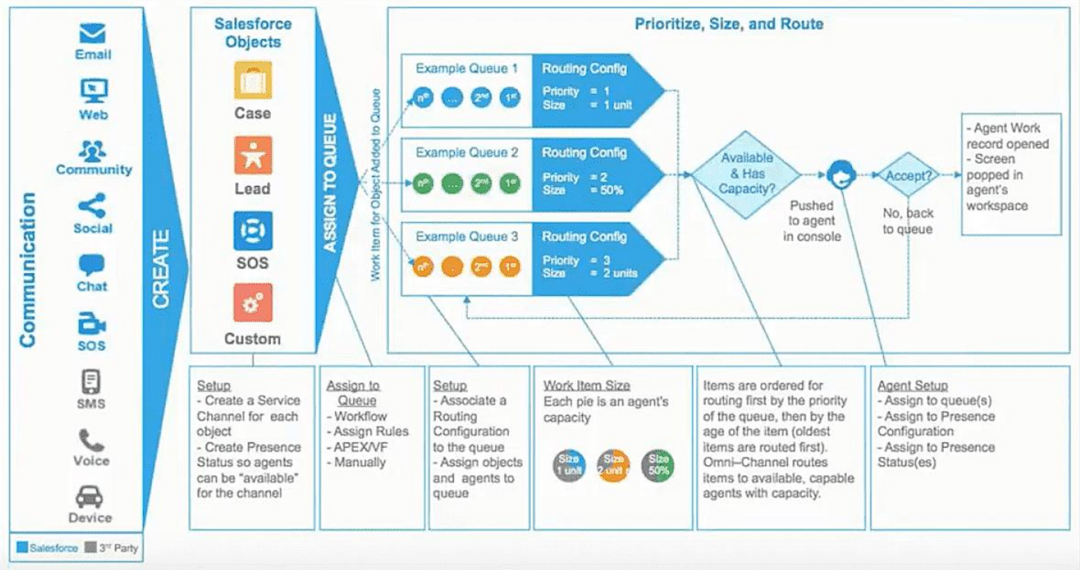
1. Once the prospect has been created, the system classifies and ranks them before assigning it to a business development rep.
   a. FF is looking for suggestions on how to rank and classify. Ranking criteria incl. revenue, location, and industry.
   b. BDRs are working in teams, they should receive new prospects evenly to avoid imbalance in the team.

2. Once qualified, the reps hand over the prospect to the Account Manager responsible for the division in the postal code to follow up. The handover should happen automatically. In the past Account Managers complained about badly qualified prospects and did not want BDM to convert on their behalf.
   a. A task should be created for the Account Manager to follow up and receive a notification on their mobile phone.

Proposed Solution (FoodForce)

1. Once the prospect has been created, the system classifies and ranks them before assigning it to a business development rep.
    a. FF is looking for suggestions on how to rank and classify. Ranking criteria incl. revenue, location, and industry.
        i. **Sales Cloud Einstein - configure for Lead Scoring using pre-defined criteria**
    b. BDRs are working in teams, they should receive new prospects evenly to avoid imbalance in the team.
        i. **Use Distribution Engine to load-balance leads (round-robin);**
2. Once qualified, the reps hand over the prospect to the Account Manager responsible for the division in the postal code to follow up. The handover should happen automatically. In the past Account Managers complained about badly qualified prospects and did not want BDM to convert on their behalf.
    a. A task should be created for the Account Manager to follow up and receive a notification on their mobile phone.
        i. **BDR qualifies lead, advances Lead status to “Qualified” & Converts;**
        ii. **Lead is converted to Account/Contact/Opportunity**
        iii. **Distribution Engine assigns Account to Account Manager via Dist. Engine Territory attribute (Zip Code);**
        iv. **Task is created via RTF on Account to follow up and push notification is sent via Salesforce App**

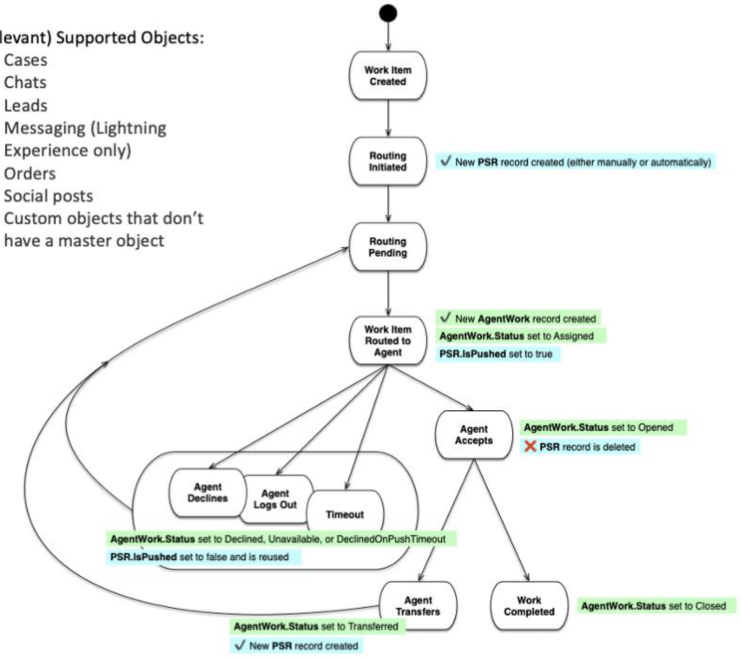
Omni-channel Routing



Queue-based Omni-channel routing.

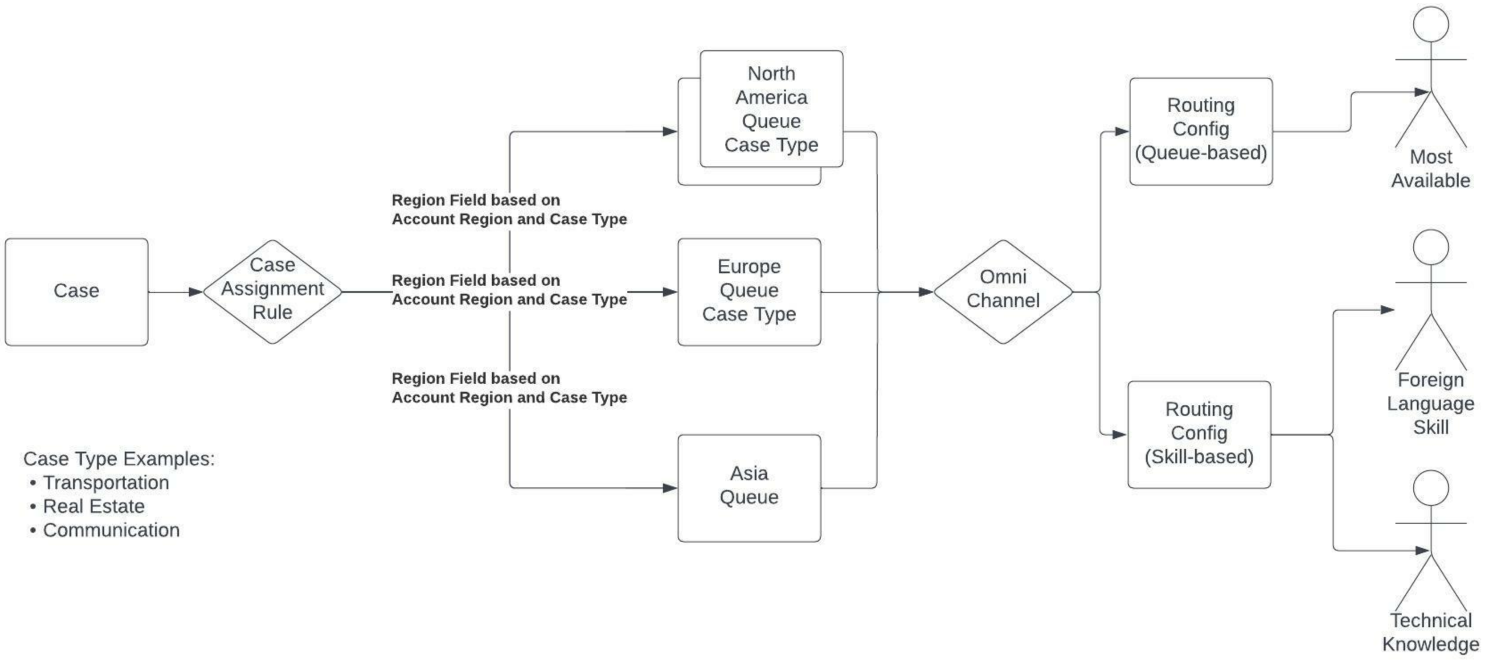
(Relevant) Supported Objects:

- Cases
- Chats
- Leads
- Messaging (Lightning Experience only)
- Orders
- Social posts
- Custom objects that don't have a master object

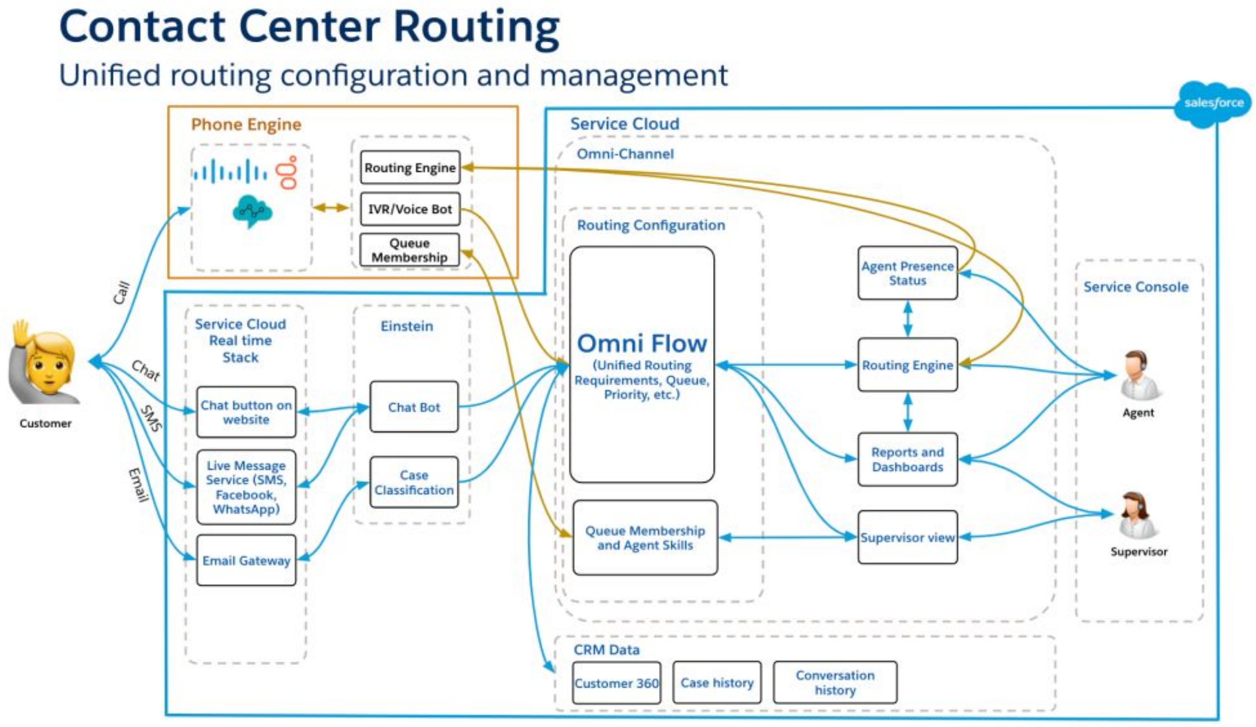


Skill-based Omni-channel routing.

Queue vs. Skill-Based Routing



Call Centers



[Unofficial SF: Service Cloud Voice Routing - Technical Deep Dive]

The diagram on the left shows the data flow across channels. The conversation (Email, Chat, Phone) first goes into its respective automation layer (IVR, Chatbot, Case Classification) before being passed to Omni where the business rules for routing and queues are defined.

For Voice, within Salesforce, three key things are synced to the back-end phone engine,

1. The Agents' presence (are they online for this channel or not)
2. Capacity (does the agent have capacity to receive work or not)
3. Routing requirements (where do we want to send the phone call)

With all of that info sent back, the phone engine can then determine which agent to deliver the call to and pass that request into Salesforce.

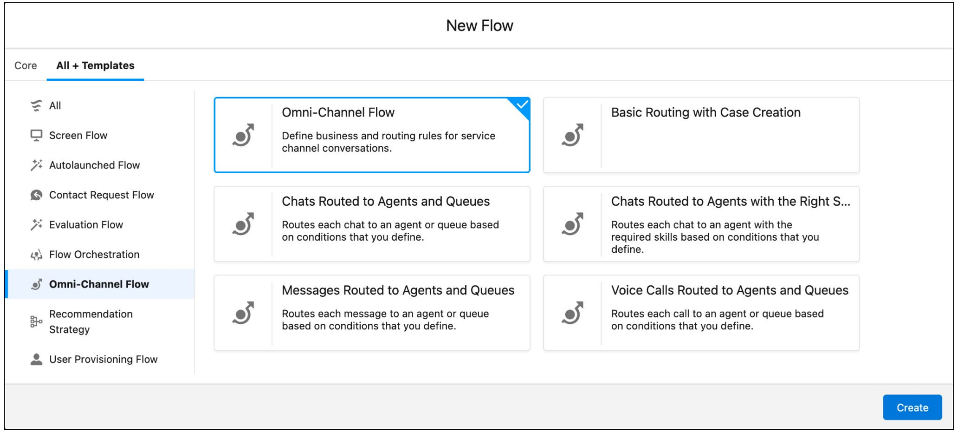
Salesforce Licenses

- Typically Omni-channel is used with Cases, therefore if the majority of the Salesforce user's work is centered around Support functionality, they will be assigned the **Service Cloud** license and Omni-channel functionality will be included.
- Service Cloud Voice or other voice-based services are licensed separately.
    - Call-control tool integrates with one Omni-Channel widget for easy access to all digital and phone conversations for fewer clicks and screens. Supervisors can see all digital interactions and help out.

Digital Engagement SKU: Omni-channel can be also used with **Sales Cloud** to distribute **Leads**, for instance.

Omni-Channel Flows

Omni-channel is supported by Flow: [How Does an Omni-Channel Flow Work?]



[Considerations & Limitations]

- This functionality must be carefully evaluated and tested, especially for scale
- If agents are unavailable to take cases, there may be problems
- If there is a requirement to first assign a work item to a particular designated agent, depending on a client account, and <u>if they are not available</u>, route it to other agents, Flow is required - this is not guaranteed to work.

Practical consulting recommendation:
If a client's requirement is in the "advanced" category, ***don't promise*** *to get it to work <u>even</u> if it's supposed to work according to the official documentation.* ***Always test first!***

Downside: wasted hours and dissatisfied clients.

Upside: If you get something to work, document it and copy it to an org you control so that you can reuse it later.

Distribution Engine

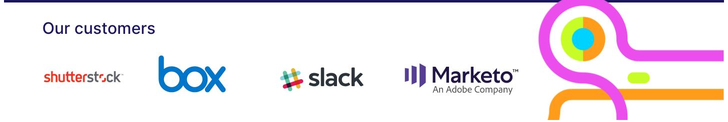
Distribution Engine: Lead Assignment & Opportunity Routing. Round Robin.

By NC Squared Ltd

Automated Lead/Account/Contact Assignment + Routing designed for Sales Ops

★★★★★ 4.97 Average Rating (117 Reviews)

- Distribution Engine is a lot more full-featured than Omni-Channel.
- DE is known for its **Round Robin** distribution of records, as well as **Load Balancing** to achieve even distribution volumes
- DE is pretty easy to configure and does not require advanced configuration skills
- Lookup Owner: e.g. when assigning leads, you may want to check if there is an **existing account** with the **same company name**, and if so **assign the lead to the account owner**.
- Sticky Assignment: Available in conjunction with **round robin** or **load balancing** methods. Sticky assignment is used to assign duplicates to the same team member for a given time period.



$45 user/month

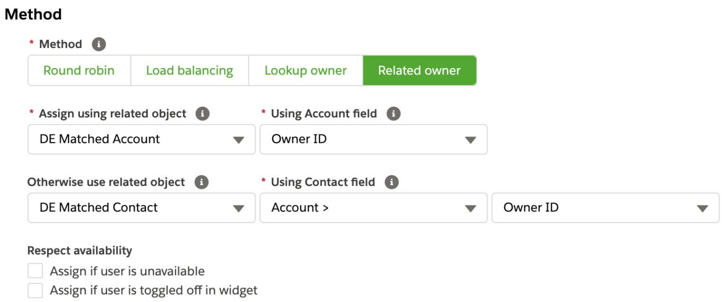
We have one plan, one price per user (your admins managers and reps). Nice and simple.

SUPPORT PACKAGES

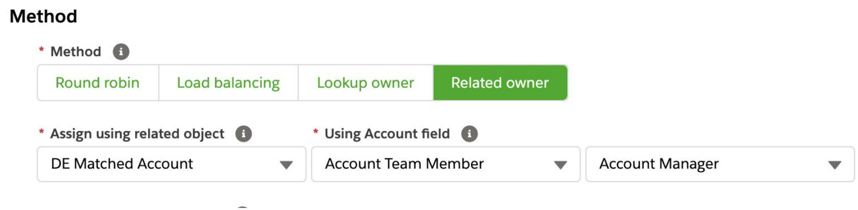
Standard support Free	Premier support 20% Extra
Email support	Email support
2 business day response time	Phone support
	4 hour response time
	1-1 coaching (via screenshare)
	Setup review

Related Owner Distribution Method

- The Related Owner distribution method is used by the Lead Matching feature but can also be used to assign records to the user in a User Lookup Field on related objects. This is an additional algorithm to our Lookup Owner and Sticky Assignment methods and is not a replacement.
- Example below shows related owner being used to assign leads which have been through the classifier lead matching feature to the owner of the matched account.

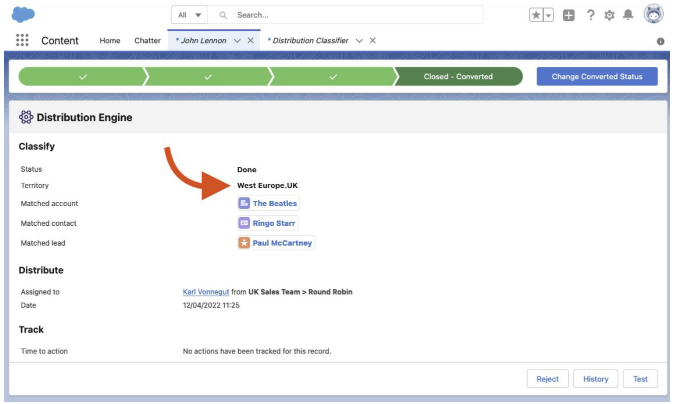


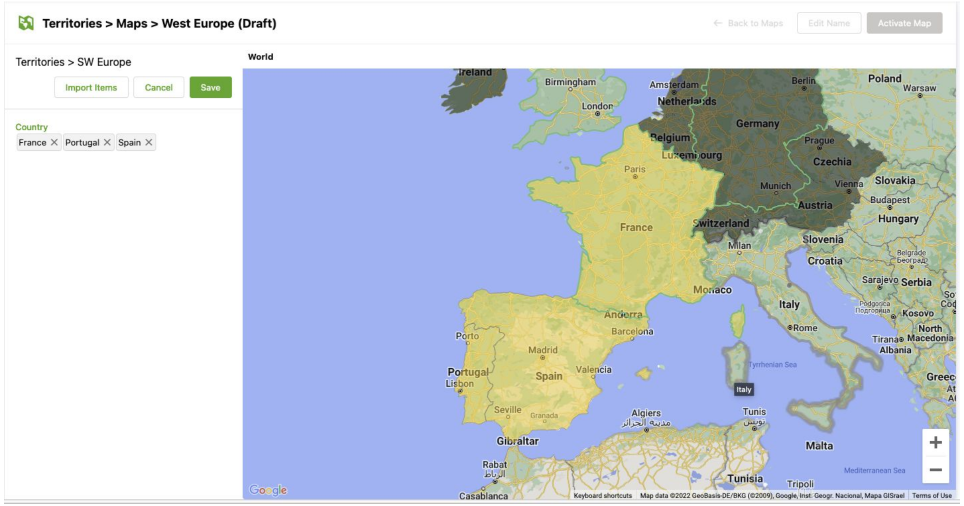
- The related owner method can also be used to assign to the relevant account **Account Team Member**.
- For example, you may want all new opportunities to assign to the Account Team - Account manager.
- With the Related Owner Algorithm you can select the Account team member and then the role



DE - Territory Classifier

- Used to simplify your assignment logic by cleaning address data and stamping records with simple territory values.
- It automatically creates tags for each territory.
- Assign territory tags to team members to easily distribute based on territory.
- Create a map: select countries, states, or zip codes to create geographic groups called territories.
- Each map can have many territories.
- Maps are point-and-click - territories can be selected with keyboard and mouse by drawing a box around regions to be included

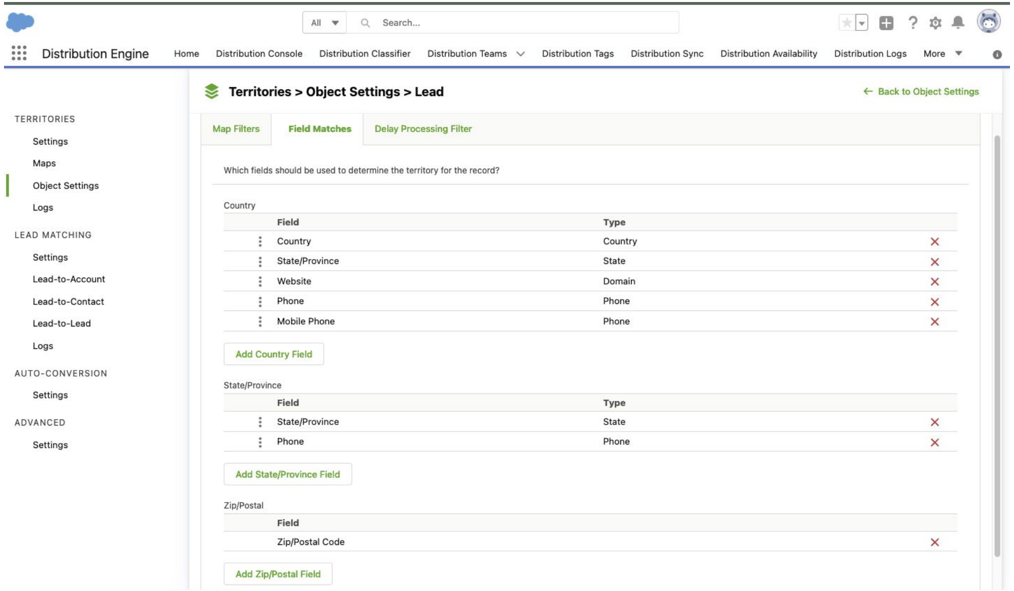




Note: this functionality has nothing to do with Enterprise Territory Management.

DE Territories (Continued...)

- DE can detect territories from a variety of data
  - **Country**: A field containing country name, including variations on country name e.g. USA, U.S.A, United States
  - **State**: A field containing a state name e.g. California would resolve the country to USA even without a country field being present
  - **Phone**: A field containing a phone number can be used to resolve a country by its international dialing code e.g. +44 will resolve the country to United Kingdom
  - **Domain**: A field containing a website or Email address can be used to resolve a country by its domain extension e.g. www.google.de will resolve the country to Germany



DE Lead Matching & Auto-Conversion

Lead Matching is part of the Distribution Engine Classifier module and allows Distribution Engine to determine whether a lead relates to existing Accounts, Contacts or other Leads already in your Salesforce organization.

Distribution Engine lead matching makes use of the Salesforce duplicate matching logic and is fully configurable.

- Performs **exact** and **fuzzy** matches.
- Matches are done using **standard fields** (first name, last name, company name, phone etc) and **also custom fields**.
- Lead-to-Lead, Lead-to-Contact, and Lead-to-Account matching is supported
- **Domain matching to the account** can be done automatically. Domains are extracted for all the existing accounts and contacts for matching and built in **intelligence differentiates between company and personal email** domains such as gmail, yahoo etc.

Lead Auto-Conversion (can be used with Lead Matching)

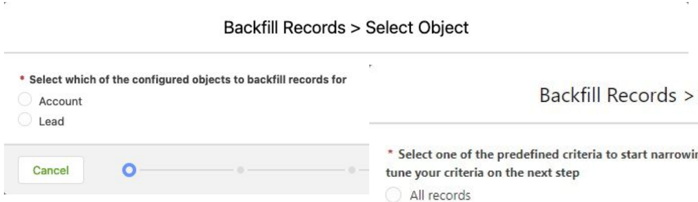
The Distribution Engine Classifier provides the capability to automatically convert incoming Leads into Accounts, Contacts and Opportunities, as if they have been converted using the manual Salesforce convert action. This conversion can be universal, or a series of rules can be created to define different actions depending on the Lead.

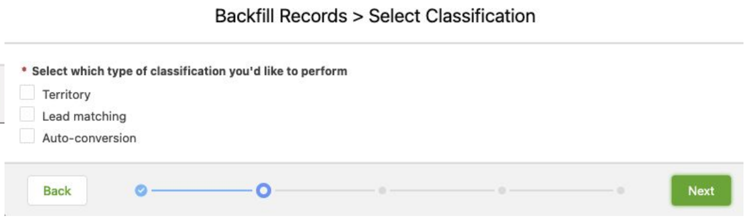
Auto-conversion can be used by customers who don't work with Leads and instead work with Opportunities, but can also be used to ensure that any Leads that relate to existing Accounts are dealt with under the existing Account object.

Note: *automated lead conversion is not suitable for all use cases & industries. Automotive industry, however, converts every single lead to an Opportunity due to its highly-competitive nature.*

Backfill

- Once the Classifier has been configured for Territories, Lead Matching or Auto-Conversion and has been enabled, it will begin matching on all newly created records.
- If you are assigning or reassigning older records, you will want to run the **backfill wizard** so that these records are processed.
- Backfills are done by Object, and when backfilling Leads, you will be able to perform Territory, Lead Matching and Auto-Conversion backfills in one action.
- Backfill for auto-conversion can result in significant changes to your org. Please ensure that your auto-conversion configuration is correct before running.





Comparison

Omni-Channel

Pros:

- Included with Service Cloud
- Supported by Omni-Channel Flows
- Tight integration with Service Cloud Voice
- Salesforce Trailhead Support

Cons:

- Limited number of objects supported
- Advanced Salesforce skills are needed to configure it properly
- Greater time-to-market for advanced use cases
- Not everything works as advertised

Distribution Engine

Distribution Engine by nc·squared

Pros:

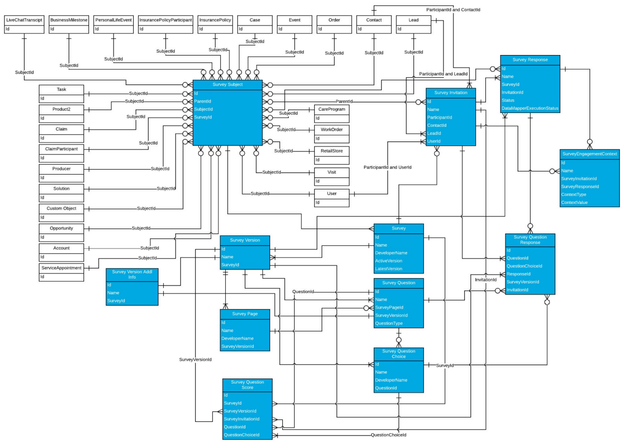
- Rich functionality
- Salesforce Native
- Works with nearly all Salesforce objects
- Easy configuration (advanced skills not necessary)
- Fantastic documentation
- Short time-to-market - great if using “buy vs. build” functionality

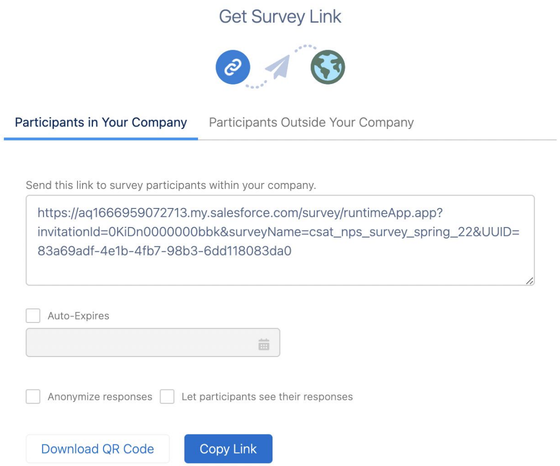
Cons:

- Paid app @ $45/user/month
- Unclear if it integrates with Service Cloud Voice
- No Salesforce Trailhead

Salesforce Surveys

- Trailhead: ~5 hrs 35 mins
- Once created, there are several ways to distribute:
  - Link
  - Email (incl. automated email)
  - Website
  - Experience Cloud
  - QR Code (internal or external users)

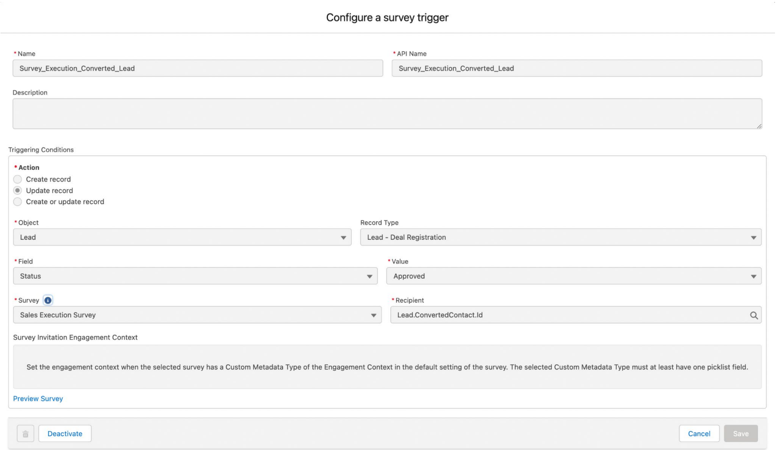




Configuration Quirks

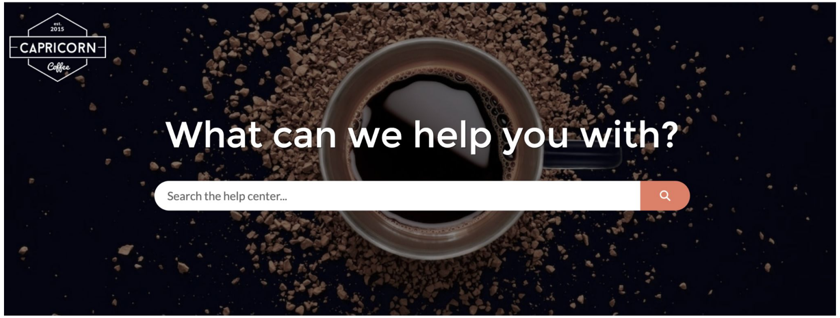
- [Survey Invitation Rules]
  - This only works if you enable an email template for distribution in a survey “Default Settings”, which is also greyed out, but works if you click on it
  - Invitation Rules is accessible from Setup & Configuration

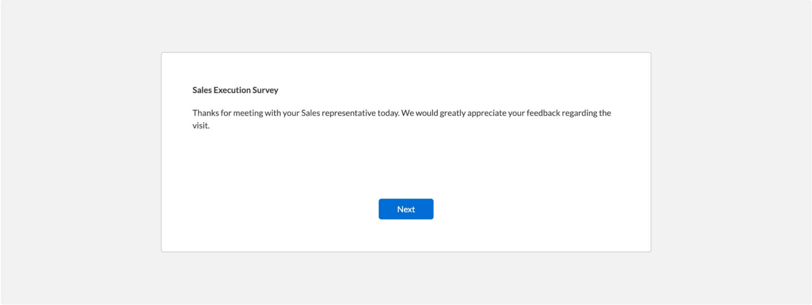
- [Embedding Surveys in a Community]
  - Follow the link above, otherwise you’ll get an error
  - This is a pretty involved process and it’s also counter-intuitive



Salesforce Surveys Considerations

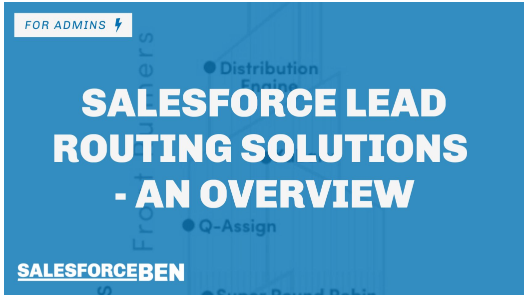
- Each Salesforce organization includes platform or basic Salesforce Survey features with a maximum of 300 free responses.
- See Salesforce Feedback Management for pricing (and try not to faint)
- Flow Core Action: Send Surveys
- Experience Cloud Surveys seem to work only in an unauthenticated community - this needs careful testing and consideration
- There are many Alternatives for Salesforce Surveys - always consider those before committing a client to a particular solution



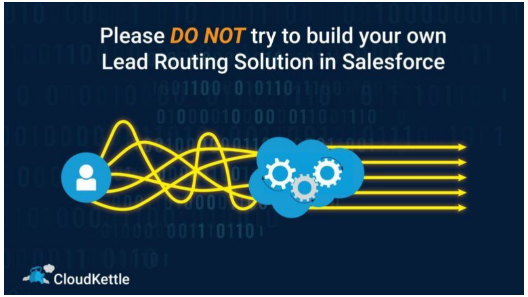


Continuing Education

Apex Hours: Omni Channel in salesforce



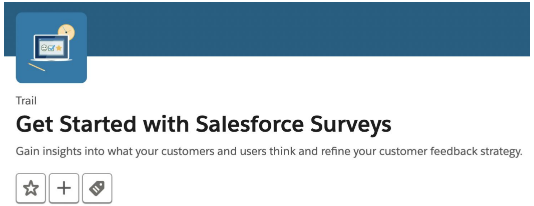
This article also covers other solutions/competitors.



A few solid arguments to back up the article's premise - Tech Debt.

Distribution Engine
by nc·squared

DE Documentation



Surveys Trailhead

Thank you!

Stay tuned in the Slack channel for the next topic and please feel free to suggest areas of interest.

Ways to get in touch...

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Obvious People Slack Channel:
#salesforce-academy