



A guide for choosing a Modern Care Solution

Set the foundation to deliver the best in class care experiences your customers have come to expect



Table of Contents

Supported Customer Care Channels	3
Social.....	3
Messaging	4
Email.....	4
Route.....	5
Case Management.....	5
Automation.....	6
AI Moderation	7
Assignment Engine	7
Resolve.....	8
Agent Console.....	8
Chatbot.....	9
Web chat.....	10
Smart Response.....	10
Handle Personally Identifiable Information	10
Measure	11
Supervisor Console.....	11
Audit Capabilities.....	11
Surveys.....	12
Reporting & Measurement.....	13



Supported Customer Care Channels

Social, messaging, and email channels

Social

It's easy to see why customers prefer social media as a way to connect with brands. As your customers reach out to you on the channels they prefer, you'll want to be there to ensure a seamless customer experience is delivered. Add all of your Social accounts in one unified location and centralize your care efforts to quickly and efficiently resolve customer issues.

Does your product support...?	Sprinklr	Other
Facebook	✓	
Instagram	✓	
Twitter	✓	
LinkedIn	✓	
Pinterest	✓	
Reddit	✓	
NextDoor	✓	
Tumblr	✓	
Yelp	✓	
YouTube	✓	
Google My Business	✓	
Foursquare	✓	
Flickr	✓	
Wordpress	✓	
Slideshare	✓	
Bazaarvoice	✓	
LINE	✓	
Renren	✓	
Sina Weibo	✓	
Tencent	✓	
VK	✓	
WeChat	✓	



Messaging

Messaging offers the type of instantaneous communication customers are growing to expect. Care teams need to make sure they are able to reach customers where they prefer to communicate. You need a vendor that is ahead of the game and able to support your ability to connect on channels your customers expect you to be.

Does your product support messaging for...?	Sprinklr	Other
Facebook Messenger	✓	
Twitter DM	✓	
WeChat	✓	
LINE	✓	
Google RCS (beta)	✓	
Instagram Direct (API limitation—roadmap)	✓	
KakaoTalk (limited availability)	✓	
Viber (limited availability)	✓	

Does your product support live chat for...?	Sprinklr	Other
Use on website desktops	✓	
Use on website mobile	✓	
Creation of cases and routing them to an agent	✓	
Script to embedded in any brand website	✓	
Customizing the chat widget as per branding requirements	✓	
Proactive chat prompts to guide a user on your website	✓	
Chatbot to respond quickly to your customers	✓	

Email

A staple in the customer service world, email is still widely considered the channel of preference for many consumers. The ability to take time and respond thoughtfully allows for meaningful correspondence. Select a vendor that supports the ability to communicate with customers across email channels alongside more modern ones.

Does your product support email for...?	Sprinklr	Other
Microsoft Exchange	✓	
Google Mail	✓	
SMTP/IMAP	✓	
Amazon SES	✓	
Zendesk	✓	



Route

Case management, Automation, AI moderation and Assignment Engine

Case Management

Access a record of communication to and from the customer, and help your teams keep up with the volume of daily messages, meet SLA requirements, and resolve issues for your customers. By bundling related inbound and outbound messages into Cases teams are equipped with background information on customer issues and questions. Make sure you have a solution that can provide the best possible service to your customers.

Does your product allow you to create...?	Sprinklr	Other
Cases on messages from social channels	✓	
Cases on messages from messaging channels	✓	
Cases on email messages	✓	
Cases on web chat messages	✓	
A single case for public messages	✓	
A single case for private messages	✓	
A single case for messages from multiple channels	✓	

Does your product allow you to ...?	Sprinklr	Other
Manually associate a message to an existing case	✓	
Automatically associate a message to an existing case	✓	
Share cases across teams and workspaces	✓	
Export case details	✓	
Track activity on the case in an audit trail	✓	
Forward a case as an email to an individual outside the platform	✓	
Automatically add tags on the case	✓	
Manually add tags on the case	✓	
Add comments on cases	✓	
Tag your team members on cases	✓	
Search for a case in the platform	✓	
Manually associate a message to an existing case	✓	
Automatically associate a message to an existing case	✓	
Delete a case	✓	



Automation

Brands need the ability to standardize processes and increase workflow efficiency by automating repetitive tasks to save time and eliminate human error. By creating a system of automatic processes that help execute actions across different areas teams can quickly address customer issues and deliver great experiences.

Does your product allow you to automatically detect...?	Sprinklr	Other
Sentiment of messages and cases	✓	
Priority of messages and cases based on keywords	✓	
Priority of messages and cases based on influencer score	✓	
Priority of messages and cases based on followers	✓	

Does your product allow you to automatically...?	Sprinklr	Other
Add customers to different profile lists based on messages for creating audience segments	✓	
Tag profile as spam and not spam	✓	
Send messages to inform customers about business hours	✓	
Un-assigns messages and cases when agents log out	✓	
Flag agent replies for banned keywords and send for approval	✓	
Tag cases and messages based on agent replies	✓	
Escalate cases and messages based on predefined conditions based on priority and time delays	✓	
Make calls to external APIs	✓	
Take actions on external CRM systems	✓	
Schedule macros and actions	✓	
Detect message language	✓	
Hide messages based on conditions	✓	
Block profiles based on predefined conditions	✓	
Change the status of a message	✓	
Change the status of cases	✓	
Configure different SLA alerts on different cases based on priority	✓	
Send out SMS, Email and Push notification to other users on the platform	✓	
Set volumetric alerts to detect anomalies	✓	
Extract information from messages using Regular Expressions and tag the corresponding case.	✓	
Archive messages based on predefined conditions	✓	
Stop or recall sent messages based on predefined filters	✓	



AI Moderation

The ability to automatically triage incoming messaging from customers can be the direct line to a happy customer. By automatically filtering out non-engageable messages and classifying remaining messages into predefined categories - reduces the time taken by your team to manually review all incoming messages and get to the root of customer issues. Ensure you have a vendor that helps your teams focus on what matters - quickly and efficiently resolving customer inquiries.

Does your product allow you to use AI to automatically...?	Sprinklr	Other
Detect messages which need a response	✓	
Classify detected messages as engageable and non-engageable	✓	
Classify messages in different categories like care or marketing related messages	✓	

Assignment Engine

Assigning messages to agents based on their availability at any given moment can only improve team productivity further. By distributing workloads more efficiently by using predefined parameters relevant to your business processes—customer experience is placed as top priority.

Does your product automatically assign cases...?	Sprinklr	Other
Based on real-time agent availability	✓	
Based on priority order	✓	
Based on an agent's skillset	✓	
Based on the language of the message	✓	
Based on custom case taggings	✓	
Preferentially to the agent who last interacted with the customer	✓	
Manually to specific teams	✓	
Manually to specific agents	✓	
Based on active conversation time	✓	

Does your product...?	Sprinklr	Other
Automatically maintain balanced and fair workload based on agent's capacity	✓	
Define backup agents to redistribute excessive load in case of an unexpected peak in incoming cases	✓	
View current assignment load on different teams in real time	✓	
Access assignment logs to check assignment activity for audit purposes	✓	
Change how many cases an agent can handle simultaneously	✓	



Resolve

Agent Console, Chatbot, Web chat, Smart Response and Handle PII

Agent Console

In order for customer care agents to be as efficient as possible they need access to information in a single spot. With a comprehensive dashboard that surfaces current and past issues they have been assigned, allows teams to manage huge inbound volume while streamlining message processing workflows. It's imperative that your vendor be able to surface information to agents in a single, unified location.

Does your product offer...?	Sprinklr	Other
A single-view of conversation history with a customer	✓	
A customizable view, based on user roles and permissions	✓	
A single view of cases from social channels, messaging channels, web chat, and email	✓	
Alerts for cases that have a risk of SLA breach	✓	
Spell check	✓	
Grammar check	✓	

Does your product allow you to...?	Sprinklr	Other
Switch between public and private messages with one click	✓	
Like a customer's message from within the conversation	✓	
Retweet a customer's message from within the conversation	✓	
Translate a customer's message	✓	
Search for and use pre-approved canned responses	✓	
Set reminders on cases to follow up	✓	
Use macros to automate a sequence of actions	✓	
Configure most used actions to be accessible on a single click via quick macros	✓	
Subscribe to a case to receive future updates on that case	✓	
Notified on being assigned a case or receiving a message from the supervisor	✓	
Export conversation history in a text file	✓	
Search for a case or conversation based on keywords, sender, case number and due date.	✓	
Sort the message and cases in the view	✓	
Send responses through mobile application	✓	

**Does your product allow you to...?****Sprinklr****Other**

Does your product allow you to...?	Sprinklr	Other
Change the status of a case	✓	
Change tags and sentiments of messages	✓	
Change tags and sentiments of cases	✓	
Add notes in customer profile	✓	
Add notes to cases	✓	
Assign a case to other agents or teams	✓	
Use agent signature in replies	✓	

Does your product allow you to view...?**Sprinklr****Other**

Does your product allow you to view...?	Sprinklr	Other
Previous cases from the same customer	✓	
External CRM data in the customer's profile	✓	
Profile and case tags while replying to a customer	✓	
External CRM data in the customer's profile	✓	
Profile and case tags while replying to the customer	✓	
Sent status of messages on supported messaging channels	✓	
Delivered status of messages on supported messaging channels	✓	
Read status of messages on supported messaging channels	✓	
An activity trail on customer profile and case	✓	

Chatbot

Optimize customer care processes without sacrificing quality. Chatbots automate customer service conversations by providing personalized conversational experiences to the user. They can automate repetitive conversations, decreasing average response time and increasing customer satisfaction.

Does your product allow you to...?**Sprinklr****Other**

Does your product allow you to...?	Sprinklr	Other
Leverage Natural Language Processing (NLP) and Intent detection to create bots	✓	
Use channel specific templates like quick replies, carousels in the bot	✓	
Use a bot for agent handover	✓	
Use an agent for bot handover	✓	
Create bots for multiple languages	✓	
Create and run bots on multiple channels	✓	
Integrate with third party bots using Facebook Handover protocol	✓	
Integrate with third party bots without using Facebook Handover protocol	✓	



Web chat

Enhance your brand's online customer service experience. Add a chat plugin on your website so customers can communicate with you directly without leaving your site. Powered by bots to answer simple queries by your customers. You can add this fast and lightweight live chat to any website by embedding a small code, and customize it to suit your brand and business needs.

Does your product allow you to...?	Sprinklr	Other
Customize the chat widget to match your brand visual guidelines	✓	
Capture name, email and phone number of your customers from webchat	✓	
Authenticate customers on web chat using SSO	✓	
Allow your customers to start multiple conversations in web chat at once	✓	

Smart Response

Smart Responses are generated by AI based on the ongoing conversation. These responses are then suggested to the agent, from where they can choose a reply. This reduces the response time and ensures more accurate responses.

Does your product allow you to...?	Sprinklr	Other
Use AI to generate and suggest responses for ongoing conversation in real time	✓	
Train Machine Learning model to learn from responses of selected best performing agents	✓	
Retrain the Machine Learning model to learn from external data	✓	
Suggest responses which are contextual and not pre-written to avoid repetitive responses	✓	
Select a suggested smart response based on predicted confidence level.	✓	
Generate reports on usage and performance of Smart Response model	✓	

Handle Personally Identifiable Information

In today's world - privacy matters. And privacy surrounding personal data matters even more. Sometimes customers share Personally Identifiable Information (PII) in messages. Ensuring this information is secure and protected is a "must-have" for any technology platform.

Does your product allow you to automatically...?	Sprinklr	Other
Encrypt messages if they contain any Personally Identifiable Information	✓	
Mask Personally Identifiable Information which are identified using Regular Expressions	✓	

Does your product allow you to...?	Sprinklr	Other
Retrospectively retract messages and cases if they contain Personally Identifiable Information	✓	
Encrypt specific tags and custom fields of messages, cases and profile	✓	



Measure

Supervisor Console, Audit Capabilities, Surveys and Reporting & Measurement

Supervisor Console

Supervisor console gives managers and supervisors a consolidated view of agent's activity and performance in real time for effective workforce management.

Does your product allow you to...?	Sprinklr	Other
View the current/past availability status and login details of agents across time zones	✓	
View activity trail of an agent	✓	
Send direct message to an agent	✓	
Change the availability status of an agent or multiple agents in bulk	✓	
Color tagging the current availability status of agents	✓	
Export the data of activity trail of the agents	✓	
Configure quick filter view		

Audit Capabilities

Regular audit activity helps in keeping the customer care process in compliance and identify the key problem areas like common issues faced by the customers. It also includes assessing the performance of agents and analyzing business process bottlenecks to ensure seamless workflows and consistent customer experiences.

Does your product allow you to...?	Sprinklr	Other
Send agent's response to predefined approval queues	✓	
Analyze and audit agent's performance through checklist forms	✓	
Analyze the survey response to identifying the root cause of problems faced by the user	✓	
Track every manual or automated actions performed on different entities via audit trails	✓	



Surveys

Direct customer feedback is extremely valuable information. Surveys allow you to capture feedback from customers on several channels and create a consolidated report with said information. A solution that allows for a comprehensive view of customer feedback allows for improvements to processes that always put customers first.

Does your product allow you to create...?	Sprinklr	Other
Multiple language versions of the same survey to get a unified reporting across languages	✓	
Condition questions in the survey	✓	

Does your product allow you to send...?	Sprinklr	Other
Surveys automatically based on predefined triggers	✓	
Channel-agnostic survey links on private messages on multiple channels	✓	
Channel-agnostic authenticated survey links on public messages (if sending a private message is not possible)	✓	

Does your product allow you to ...?	Sprinklr	Other
Customize and personalize your survey message effectively with placeholders	✓	
Take actions like adding customers to specific audience profile list based on their survey response	✓	
View and analyze your customer's feedback data in a dedicated survey reporting dashboard using Survey-specific metrics and dimensions	✓	
Measure your NPS (Net Promoter Score) based on the survey responses filled out by your customers	✓	
Restrict surveys from being sent to customers who have opted out	✓	
Restrict surveys from being sent to customers who have responded to that survey in the last 'x' days	✓	



Reporting & Measurement

The solution of choice should offer reporting capabilities that highlight not only high-level agent performance and SLA insights, but also the ability to drill down into specific metrics for a deeper understanding. Furthermore, reporting widgets and dashboards should be flexible to accommodate you and the goals you're targeting while also providing a seamless process for surfacing insights to other team members and leadership.

Does your product allow you to create...?	Sprinklr	Other
A unified reporting for all your accounts across social, messaging, email, webchat, and ads	✓	
A unified report across all time zones	✓	
Reports for a specified date range	✓	
Sections within same report	✓	
Custom reports to match your business needs using custom metrics and dimensions	✓	
Dynamic charts, tables, and graphs to represent data	✓	
Case reports to measure case and message level SLA metrics	✓	
Agent performance reports	✓	
Agent wise CSAT report	✓	

Does your product allow you to...?	Sprinklr	Other
Drill down on created graphs, tables and charts for different dimensions, agents, accounts	✓	
Apply dashboard level filters using dimensions	✓	
Apply widget level filter using dimensions	✓	
Automatically schedule export of reports in pdf, text, csv, excel	✓	
Manually trigger export of reports in pdf, text, csv, excel	✓	
Ingest external data and combine with platform data to create unified reports	✓	
Expose platform report and data via APIs	✓	
View all reports from mobile application	✓	