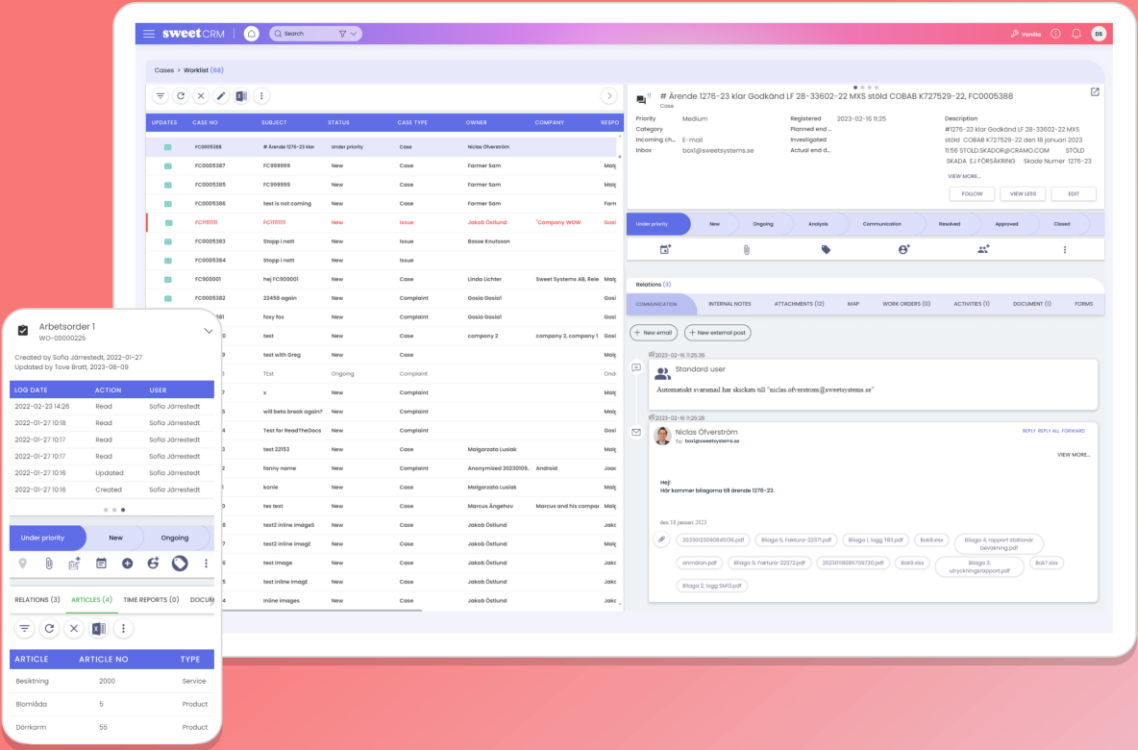# sweet for Service

PRODUCT SHEET

The background

Effective support and case management are integral to success and customer satisfaction. Introducing Sweet for service, a solution designed to transform the way you handle customer interactions and streamline case management, with the power of automation! But before we start, a little introduction to our point of view!
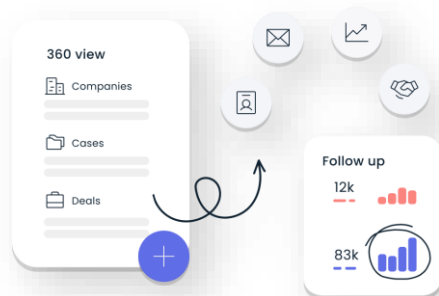
At Sweet, our CEO often emphasizes the intrinsic connection between Service and Marketing, rooted in the fundamental principles that customers present either a need or an issue—challenges we eagerly embrace. Our belief is that the solution often involves a small tweak in communication or information. It's about delivering the right message to the customers, exactly when they need it in their customer journey.

Over the years, numerous clients have approached us seeking a user-friendly case management platform to handle the inflow of support cases efficiently. And yes, we're pretty good at that! But you know what? We'd much rather share some nifty tricks to avoid those support cases altogether. Call us optimists, but a proactive approach to service— offering up the info customers crave through user-friendly channels, without needing a human touch—really does wonders.

We provide you with the tools to deliver exceptional service, before, during and after questions or issues arise. By giving you dynamic solutions that can be changed when you need to, that's possible to adjust and steer to fit your requirements along with the power of automation. Interested? **Keep reading.**

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What are your needs?

I need help **understanding** why we have so much support

We need to be able to **customize** our process and create our rules

We must be able to work as a **team**

We want to **automate** time consuming, manual steps

We want to be able to work more **effectively**

We want to help our customers **faster**, and **better**

We need to make sure our data is **safe** and handeld correcly

I want to know what to do next, and how to **prioritize** my day

Sweet, why don't you all come over here and I'll show you how we can do **all that**?

Niclas Öfverström
Business Developer Sweet CRM

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About Sweet for Service

Effective support and case management are integral to success and customer satisfaction. Introducing Sweet CRM, a solution designed to transform the way you handle customer interactions and streamline case management, with the power of automation!
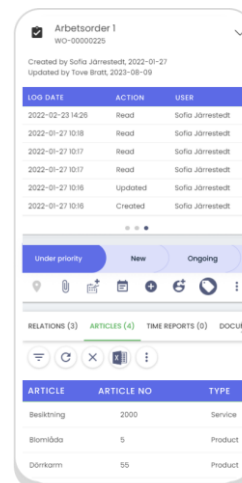
The Challenge?

Managing support requests and cases efficiently is a perpetual challenge for businesses across industries. As customer expectations continue to rise, the need for a robust system that not only organizes but also automates processes becomes paramount. Being one step ahead does not have to be hard but often is so until you crack the code.
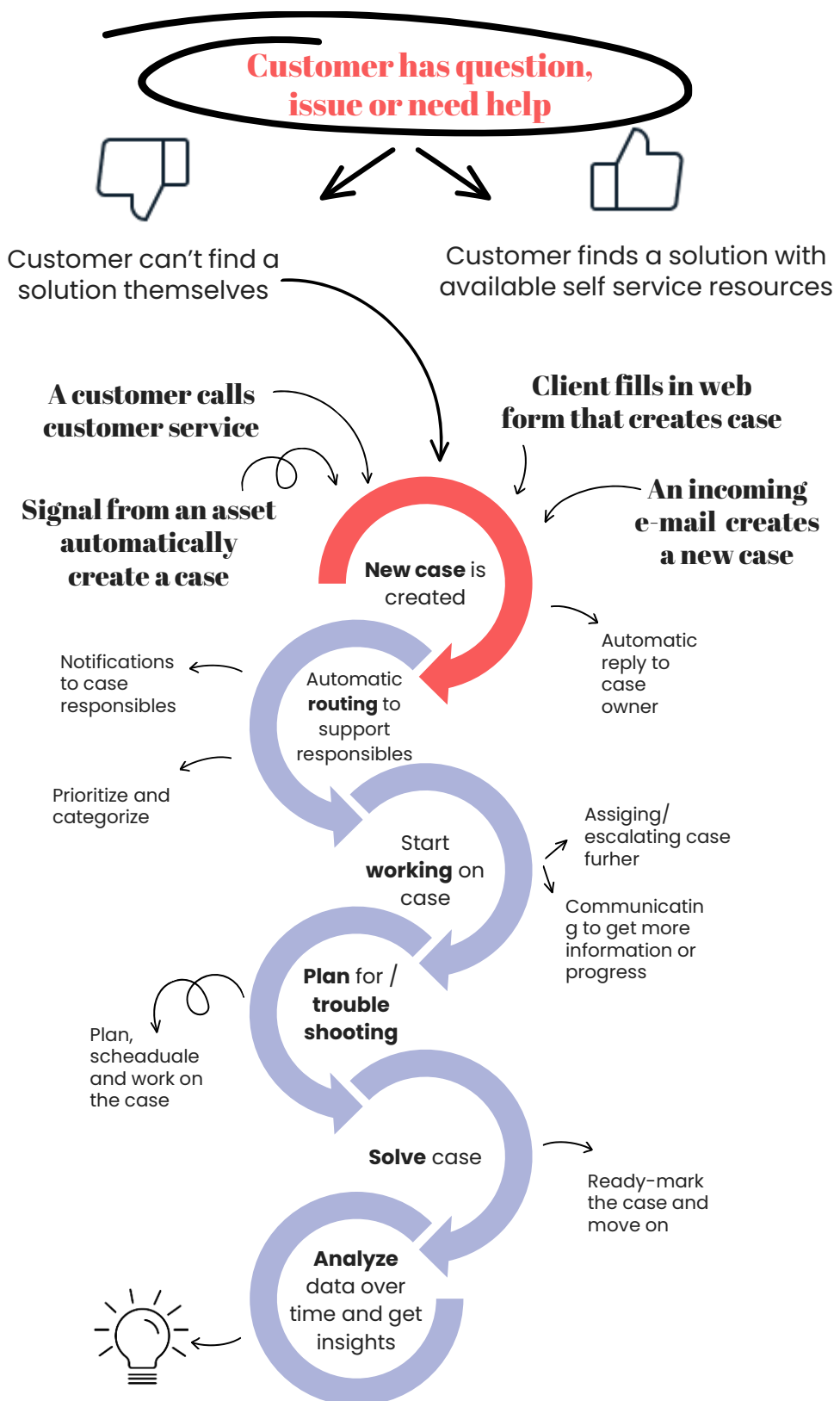
The Solution

Enter Sweet CRM—a comprehensive platform engineered to go beyond conventional support management. We understand that your time is valuable, and usability is non-negotiable. That's why Sweet CRM is not just a tool; it's a strategic ally in delivering exceptional customer service, both reactive or preferably proactively. Packaged with Sweet Automation, magic is around the corner!

Why Sweet CRM?

- **Easy and straight forward**: Both the service team and customers want it to be easy to report, communicate, and solve cases – here we are!

- **Seamless integration**: Sweet CRM easily integrates with your existing tools and systems via API, creating a unified ecosystem that enhances collaboration and efficiency among departments and stakeholders.

- **Efficient automation and rule builder**: Our system leverages advanced automation algorithms to let you customize the way you route and prioritize cases, ensuring rapid and accurate resolutions.

Get ready to revolutionize your service experience!

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Service process, an example

Customer has question, issue or need help

Customer can't find a solution themselves

Customer finds a solution with available self service resources

A customer calls customer service

Client fills in web form that creates case

Signal from an asset automatically create a case

New case is created

An incoming e-mail creates a new case

Notifications to case responsibles

Automatic **routing** to support responsibles

Automatic reply to case owner

Prioritize and categorize

Start **working** on case

Assiging/ escalating case furher

Communicatin g to get more information or progress

Plan for / **trouble shooting**

Plan, scheaduale and work on the case

Solve case

Ready-mark the case and move on

Analyze data over time and get insights

First class service offering

The Sweet CRM platform is a comprehensive software solution designed to streamline and automate the process of managing support, service or incidents within an organization. It provides a centralized system for tracking, communicating, documenting, planning and resolving cases, ensuring efficient collaboration, and optimizing workflow.

Sweet Automation is key in the Sweet for Service solution and brings numerous benefits to organizations. By automating steps in the service processes, businesses can eliminate manual, time-consuming tasks and reduce the risk of errors. This gives you faster average handling time and saves valuable time and resources, allowing employees to focus on more strategic and value-added activities. Happy customers come along!

Case management I Collaboration I Routing I Auto-reply I Overview Service Process Automation I Rule builder I Advanced segmentation I Follow-up I Document sharing I Storage

sweetCRM
The user interface and case management platform

+

sweetAUTOMATION
The business proccess automation tool and rule builder

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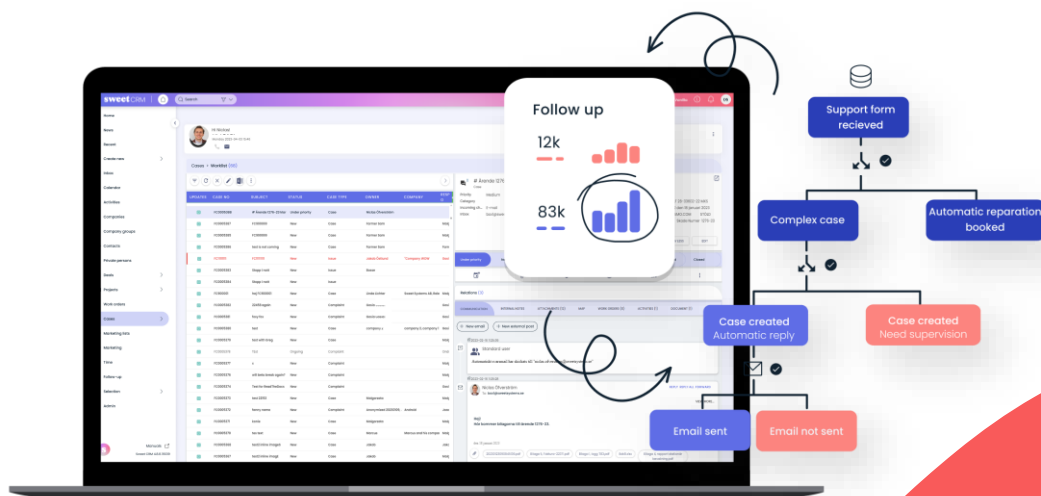
What you get

When you think of service, support or case management you might picture a support organizations with headphones constantly picking up the phone to try to help frustrated customers? We don't. We have seen organizations taking many steps beyond just that, with the aim of being proactive and even more service minded.

Pipeline or list overview in a glance
Efficiency begins with clarity. Sweet CRM provides a quick and user-friendly overview of your case pipeline, allowing you to grasp the current status effortlessly. From there, seamlessly dive into the details of each case, prioritized by you or based on defined rules.

Flexibility to meet your needs
Sweet offers flexibility, allowing you to tailor the solution to meet your specific needs. Customize the system to align with your requirements, incorporating control functions, rules, routing, classification and steps of automation by building rules in Sweet Automation rule builder.

Routing and collaboration
Routing cases can be troublesome, and everyone wants it to be easy! With Sweet, it can be done to certain people or user groups, or with the help of pre-defined rules and criteria to the most suitable resource.

Effective communication
Sweet CRM facilitates effective interaction with stakeholders through integrated email functionality. Request additional information or provide progress updates effortlessly. Our recommendation? Combine e-mails with standardized digital forms, **Sweet Forms**, to report issue, or request more information in a structured way.

Multi-channel starting points
Service interactions are diverse and must be dynamic. Sweet CRM recognizes this by providing a range of touch points. Report issues in your preferred channel

- Submit through email
- Utilize **customer/partner portals** for a seamless experience
- Answer **Sweets digital form** on website, intranet, link or another platform
- Call for assistance
- Engage face-to-face interactions
- Support team report issue
- Automatic issue report based on signals/ IoT/ monitoring or pre-defined rules or values
- Other integrations, find our standard integrations **here**

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What you get

Secure storage of information, files and communication
Sweet offers a solution with a high level of information security, we are certified in the ISO standard 27001 for information security and have worked hard on making our software as safe and robust as possible. Read more about it here.
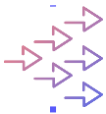
Automation to manage your processes*
When and why automate case management tasks? Automation enhances efficiency by tackling repetitive tasks, reducing errors, streamlining workflows, providing real-time insights, scaling with growth, ensuring compliance, cutting costs, and improving customer communication. This will elevate your service!

User-friendly interface
Sweet is packaged to be easy and intuitive, yet powerful with all its functionality. Common user feedback is the high level of usability – we hope you will agree on that!

Categorization of cases
Categorize cases based on their nature, urgency, service agreements or other criteria. Streamline your case management process and easily locate and prioritize cases.

Integrations & API*
Sweet can connect with other platforms and systems, like ERPs, databases, banking or analytics platforms. Of course, we have an API that makes it all easier from our end!

Analytics and reporting
Gain valuable insights into the effectiveness of your campaigns with detailed analytics and reporting. Track metrics like open rates, click-through rates, conversion rates, and revenue attribution to optimize your marketing strategies.

### Get a 360 view of all relations
Obtain a complete 360-degree view of your relationships. Sweet's platform automatically links cases with customers, ensuring an up-to-date customer profile with a comprehensive overview of interactions. This enables quick analysis, improved customer service, and efficient interaction tracking. Keep your customer card updated for seamless matching.

* CRM Automation & Sweet Automation Unlimited can be added to your Sweet for Service subscription.

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Customer and partner portal

Seamless case management with stakeholders

Imagine a place where you can collaborate with customers and partners and easily, seamless and securely communicate around service cases, questions or issues. That place is called the External Portal and is a limited portal for customers and partners where they can log in, follow their service cases, report new issues or ask questions. You can easily communicate in written text or by sharing files or information seamlessly. By not being bound to use e-mail or text or like for communicating, you can feel safe about sharing sensitive information in a secure way. The external portal is integrated in Sweet CRM and therefor manages the information seamlessly.
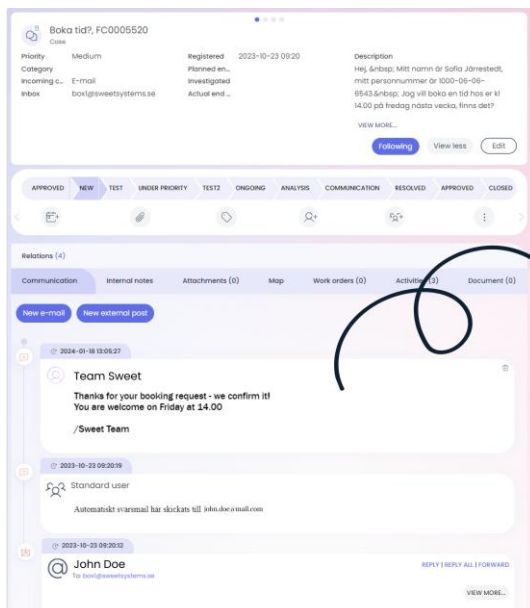

What you do
✓ Authenticate before reporting issues
✓ Communicate seamlessly
✓ Share files securely
✓ Follow progress in real time

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Proactive or responsive service?

Predictive insights for proactive service

Predictive insights are at the heart of Sweet's integrated services, enabling organizations to harness foresight from connected devices. By foreseeing potential issues and strategically planning service interventions, companies can minimize disruptions and elevate customer satisfaction. So Sweet!
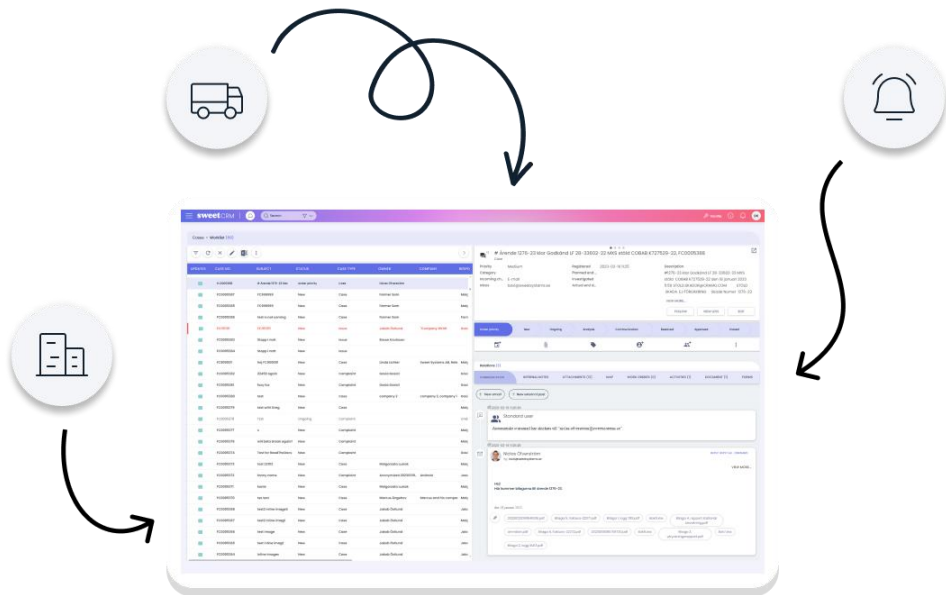

Strategic service management

Whether your organization operates with planned service initiatives, utilizes signals from IoT-connected entities, or handles reactive support when customers encounter problems, Sweet CRM offers a versatile solution. We empower businesses to strategize and implement customer journeys that prioritize planned service, aiming to prevent issues and maximize product or service uptime. The goal is not just fixing problems but understanding the value of proactive service in keeping customers satisfied.

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Service add-ons

Sweet Forms for data collection and interface

To truly understand your customers and their needs, it's crucial to engage with them directly and gather valuable information in an easy way. Sweet offers exceptional solutions for conducting digital forms or surveys and collecting customer insights through user-friendly online forms. With our powerful digital form capabilities, you can easily distribute your form on your website, in your own customer portal, embedded in Sweet CRM, with a link, or intranet to let your stakeholders start the service case trough the dynamic form. From there we automate a process to handle the response and start the service process!
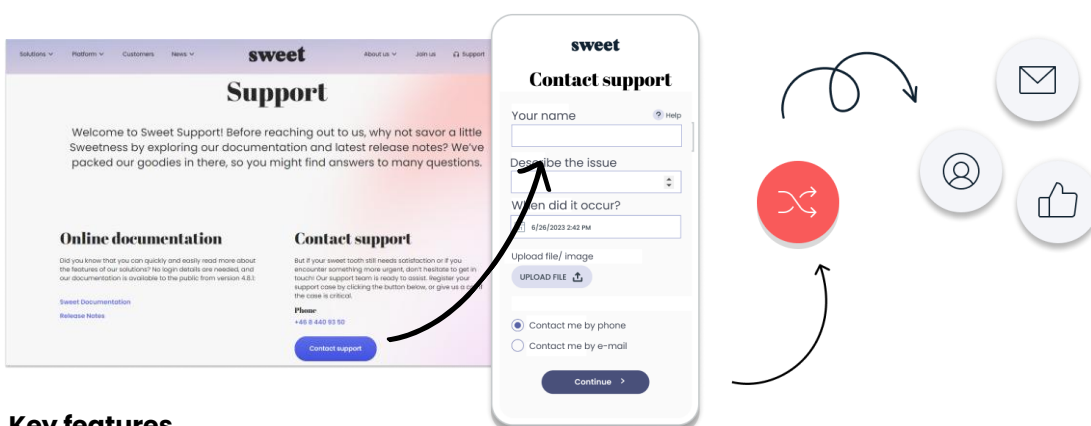
Key features

- **Seamless digital forms creation:** Easily create customized forms or surveys tailored to your specific needs using Sweet's intuitive Form designer tool. Design engaging questionnaires that capture customer opinions effectively, directly from your website or a distributed link.

- **Use the data you have and pre-populate it** so the customer can focus on answering the things you really want to know!

- **Multi-channel distribution:** Reach your customers through various channels, including email, customer portal or website.

- **Real-time responses:** Collect responses in real-time, allowing you to promptly analyze and act upon the feedback received. Stay agile and responsive to your customers' needs and preferences.

- **Actionable insights**: Empower your decision-making process with the valuable insights gathered from customer feedback. Identify areas for improvement, optimize your strategies, and enhance customer satisfaction.

Read more

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Service add-ons

Sweet Performance for service analytics

Are you ready to elevate your service performance to new heights? Sweet offers real-time dashboards and monitoring: Stay up to date with our dynamic dashboards and real-time monitoring capabilities. Track key metrics, visualize data with customizable charts, and gain invaluable insights into your operations. All in a very user-friendly manner so everyone can do it!
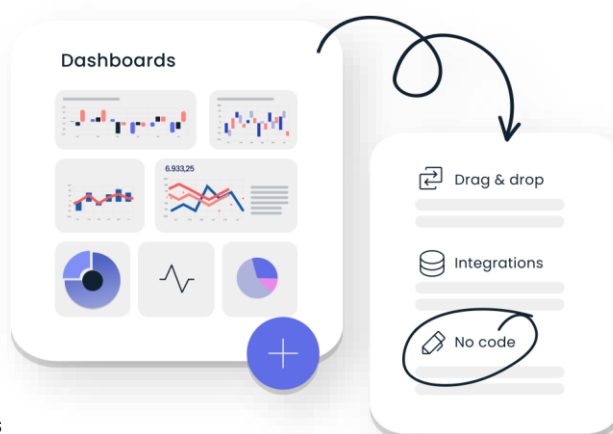
Key features

- **Do It Yourself:** Sweet's user-friendly interface empowers you to take control. Customize your dashboards and charts according to your unique needs, putting you in the driver's seat of your performance analysis.

- **Service tracking:** Keep a close eye on your service performance with our comprehensive charts where you create your own service tracking. Identify issues, trends, spot opportunities, and make data-driven decisions that drive growth.

- **KPI setup and measurement:** Define and measure your Key Performance Indicators (KPIs) effortlessly. Sweet simplifies the process, ensuring you're always aligned with your business objectives.

- **Goals and metrics:** Set clear goals and track your progress with precision. Sweet's goal-oriented approach makes it easier than ever to stay on the path to success.

- **Seamless insights sharing:** Collaboration is a breeze with Sweet. Share your insights easily with your team or managers, fostering a data-driven culture that fuels competition and results.

- **Multi-source data integration:** Sweet isn't limited to one data source - Sweet Automation makes it possible. Integrate data from multiple sources to get a holistic view of your performance, allowing for more informed decisions.

Read more

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Integrations

Communication

One to one:

We integrate with your e-mail inboxes and support both incoming and outgoing e-mail communication.

One to many:

Spotler Mailpro for email efficient and smooth e-mail and SMS communication.

Symplify will help your e-mail communication reach the next level.

Calendar and mailbox

Microsoft Outlook integration for syncing personal e-mails and calendar smoothly.

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Integrations

Customer portal

Communicate in a customer portal where your customer can keep all interactions and information in one place using Sweet Customer Portal connected to the Sweet CRM.

Map

Streetview: For each case, it's possible to add the longitude and latitude to view and display the position of the case on a map.

API
Don't you find the integration you're looking for? With our API:s it's easy to build new integrations.

Find our API documentation here

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Security and Compliance

Authentication

We offer a diverse range of authentication options tailored to meet your specific needs for securing your data. Some of the providers we support

- SweetID
- Microsoft Entra ID (previous Azure AD)
- Google

User access controls

We provide various user levels, ranging from basic users to administrators, each with different access rights and privileges. Your assigned user level will determine the extent of access you have within the system.

GDPR

Our solutions are fully compliant with the current regulations outlined in the General Data Protection Regulation (GDPR). We prioritize the security and privacy of your data, and our platform includes built-in features to support anonymization or deletion of data as well as the ability to tag sensitive information. With our GDPR-compliant solutions, you can trust that your data is handled in accordance with high privacy standards.

Information security

At Sweet, we prioritize the security of your data and we are proud to be ISO 27001 "Information Security Management" certified. With our well-established processes, we ensure that your data is always handled and managed securely. Data and information security are of utmost importance to us, and we go above and beyond to safeguard your valuable information.

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Infrastructure & Storage

Platform details

Sweet for Sales is a bundle of Sweet CRM and Sweet Automation.

- **Sweet CRM** and its capabilities of holding case management, marketing plans, projects and activities, together with contact details to your customers, suppliers, partners leads etc. Sweet CRM acting as your best interface for overviews and your everyday work.

- **Sweet Automation** and its automation capabilities together with the rules engine to automate your sales processes and interactions. This is also the place where the integrations to lead sources, e-marketing providers and other systems is managed.
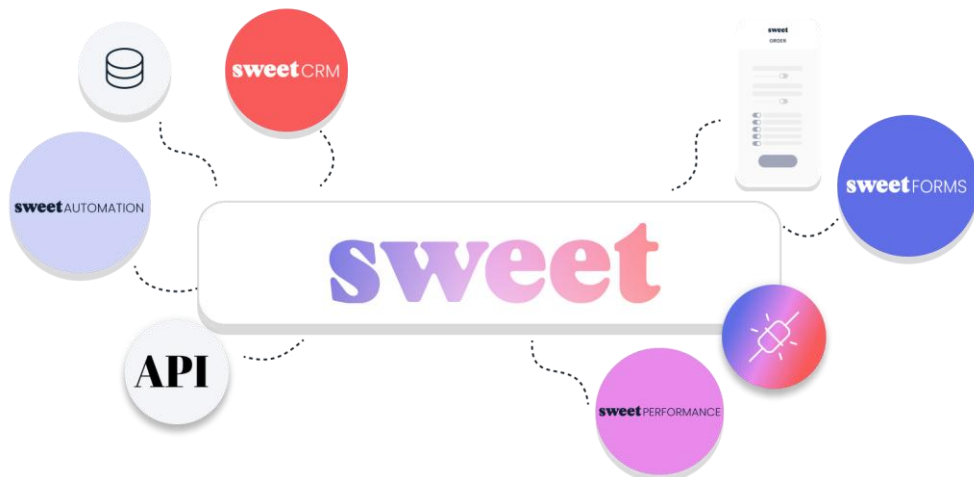
Setup

Our setup model is easy, it's a digital platform with a cloud first setup strategy (but we can help you set it up locally when required.)

- Microsoft Azure Cloud, either shared or separate cloud
- On-premise

Storage

Just like the setup, storage is connected to the chosen setup model. We offer storage

- Microsoft Azure Cloud, either shared or separate cloud
- On-premise
- For highly sensitive data, that requires encrypted storage, or storage located in Sweden – we partner up with Synkzone that offers secure and encrypted storage in the cloud. **Read more**.

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Infrastructure & Storage

Selections

Selections form the foundation of data extraction. The selections can be divided into two parts, metadata and the selection templates:

Metadata of the selections

The selection engine stores metadata about data sources within the platform. This metadata includes:

- Names and descriptions of tables and columns in a relational database.
- Paths, filenames and filetypes of files stored either on network shares or online
- API endpoints

Sensitive metadata, such as connection strings and authentication credentials, is encrypted for security. Only administrators with the necessary permissions can access the metadata of the selections.

Selection templates

Using the stored metadata, users can craft selection templates. Upon execution, these templates extract data from the data source, which might be sensitive or non-sensitive. Every extraction is logged, capturing details like:

- User access and potential data exposure
- Time of extraction
- Exact database query details
- Amount of data rows returned

Selections may be locked so that they cannot be changed by any other user (or admin). All selection templates and the data extraction logs can be accessed by all users of the system.

Storage continuing

Flows

Users of the system can build flows that execute actions. These actions may perform a whole range of different tasks. For example, send or retrieve emails, export or read a file, update a database, do API calls, etc.

While doing this Sweet Automation needs to retain some data to keep state of ongoing processes. This data could be unique IDs like CaseId, AccountId, CustomerId or anything else that uniquely identifies "the object that is being processed in the flow" that we call the "flow participant".

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Infrastructure & Storage

Users may choose where to store the flow related data. Either

- Within the platform.
- In any relational database table, outside of the platform.

Depending on the nature of the data the user can decide which storage fits best per flow.

Logging
Every run within a flow is logged, capturing details like:

- User that scheduled the run
- Start and end date of the run
- Affected rows of the run
- The exact configuration of the action at the point of the run
- If any selection templates were used within the run, that is logged according to the specification above.

Flows may be locked so that they cannot be changed by any other user (or admin).

Flow may be configured to run in "test mode" where selected action runs are skipped.

All flows and all run logs can be accessed by all users of the system.

<u>Files uploaded in the flows</u>

Users have the possibility to upload files into Sweet Automation that might be needed for a specific Flow.

These files are stored within the platform and can be accessed by all users of the system.

Don't hesitate to <u>contact us</u> with your questions, we're happy to serve!

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Are you ready to get started with Sweet?

Contact us

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Sign up for our monthly **newsletter**