STEELE PROCESS PARTNERS

PORTFOLIO CASE STUDY · ANONYMIZED

Customers were bouncing between teams, and the fix wasn't the routing rules.

A service organization was seeing customer cases handed off to local teams by default, even when the issue could have been resolved centrally, creating avoidable delay and repeat contacts.

- Cases bounced between centralized care, specialists, and local teams
- Customers repeated their issue every time ownership changed
- Leadership had no baseline for why handoffs kept happening

THE REAL ISSUE

The visible issue was routing. The deeper issue was that agents didn't consistently have the guidance, ownership clarity, or confidence to resolve or correctly route the work.

HOW THE FIX CHANGED THE OUTCOME

Cases labeled by category, not customer language → **Analysis connects case data, calls, history & knowledge** → **Root cause: enablement & ownership gap, not effort** → **Clear path to fewer avoidable handoffs**

WHY THE REPORTS COULDN'T EXPLAIN IT

System labels didn't explain why work moved.

The case categories described how the system labeled work, not what customers were actually calling about, why an agent chose to hand a case off, or where the resolution guidance had broken down.

So the analysis started somewhere different. Instead of internal category labels, it followed the language customers actually used, then traced how that connected to where work moved and what guidance the agent had in hand.

WHAT STANDARD REPORTING COULDN'T EXPLAIN

- Did the category match the real issue?
- How often did ownership change?
- Procedure, or a real resolution path?

WHAT THE ANALYSIS CONNECTED

1. Case data: category, status, owner, resolution fields
2. Call summaries: the customer's actual words
3. Case history: how ownership moved between teams
4. Knowledge articles: what agents were actually told to do

The handoff pattern was a signal, not the whole diagnosis.

Connecting data that normally stayed siloed (reports, history, call summaries, and knowledge content) surfaced patterns no single source showed on its own:

Language revealed real patterns

Customer language showed issue patterns the category structure didn't explain.

Repeated ownership changes

History showed work reassigned repeatedly, even when routed correctly the first time.

Procedure, not resolution

Knowledge articles often described steps, not how to actually resolve the issue.

Two more findings, and what changed.

Ownership wasn't clear

Decision rights between centralized, specialist, and local teams weren't defined.

Turnover widened the gap

Newer agents had fewer resources to resolve issues without handing them off.

BEFORE

A handoff felt safer than resolving an issue with incomplete guidance. Local teams absorbed work by default.

AFTER

Clear ownership rules and resolution-focused knowledge content make the correct next step obvious.

RECOMMENDATIONS, ROLE, AND STATUS

Make the correct next step easier to recognize.

Recommended actions were designed to reduce handoffs and strengthen enablement, alongside a measurement baseline:

Handoffs per case

How often a case changes ownership before resolution.

Resolution time

Time from intake to closure, by issue type and route.

Knowledge coverage

Whether guidance exists and supports first-contact resolution.

Agent confidence

Where agents still lack clarity that system data alone won't show.

Public, anonymized portfolio case study. Company names, internal details, and data values have been generalized. My role: root-cause analysis, stakeholder-ready recommendations, and measurement design. The project established a baseline and recommendations; post-implementation results were not available because the work concluded during a broader organizational downsizing.

Salesforce Service Cloud, case management, case history and routing analysis, Salesforce Knowledge, and measurement design.