

DESIGNING A UNIFIED SUPPORT OPERATION

Executive summary | Flagship conceptual case study grounded in professional experience

Decision in one sentence: Choose the primary agent workspace based on where daily support work lives, preserve explicit ownership between Salesforce and Amazon Connect, and implement knowledge, quality, analytics, security, and adoption as parts of the operating model.

BUSINESS PROBLEM

Customers and agents experience the seams between contact routing, customer and case data, knowledge, quality, follow-up work, and reporting. A platform migration alone will not resolve fragmented ownership or inconsistent operating practices.

OPERATING-MODEL OPTIONS

Option A - Amazon Connect Agent Workspace Best when interaction workflows, Amazon Connect capabilities, custom agent guidance, and AWS-native integration drive most daily work.	Option B - Salesforce Service Console Best when customer records, cases, entitlements, approvals, and CRM workflows dominate the agent experience.
Strengths Flexible contact-center UX; direct Amazon Connect capability; event-driven AWS workflows; reduced dependence on a complex CRM desktop.	Strengths Customer and case context remain central; existing Salesforce workflow and permissions are reused; lower context switching for CRM-heavy work.
Constraints More custom integration and UX ownership; Salesforce synchronization and write-back must be designed carefully.	Constraints Amazon Connect capability depends on integration quality; CRM complexity, licensing, and release coordination may be higher.

SYSTEM OWNERSHIP

Platform	Primary ownership
Salesforce	Accounts, contacts, cases, entitlements, tasks, approvals, follow-up ownership, customer activity
Amazon Connect	Routing, queues, flows, tasks, contact IDs, recordings, transcripts, attributes, real-time metrics
Knowledge platform	Authoring, review, versioning, metadata, approved content, feedback, gap backlog
AWS integration services	APIs, events, orchestration, lightweight state, monitoring, retries, exception handling

TARGET OPERATING MODEL

Channels & routing Amazon Connect voice, chat, messaging, email, tasks, queues, flows, and real-time metrics.	Customer & case work Salesforce accounts, cases, entitlements, tasks, approvals, and customer history.
Knowledge & guidance Governed authoring, publishing, search, decision guides, feedback, and agent assistance.	Improvement & governance QA, coaching, analytics, workforce, security, observability, operational review, and change ownership.

18-WEEK IMPLEMENTATION ROADMAP

Timing	Phase	Primary work
Weeks 1-3	Discover	Map journeys, agent work, channels, systems, ownership, risk, cost, and baseline measures
Weeks 4-6	Decide	Compare workspace models, select architecture, define requirements and success criteria
Weeks 7-10	Configure & integrate	Build routing, workspace, Salesforce integration, knowledge, security, and observability
Weeks 11-13	Validate	Test functional, operational, security, performance, reporting, and failure scenarios
Weeks 14-16	Pilot & launch	Train users, pilot selected work, monitor adoption, resolve issues, and expand
Weeks 17-18	Stabilize	Tune routing, close knowledge gaps, confirm ownership, review metrics, and prioritize improvements

COST AND OPERATING CONSIDERATIONS

Area	Planning considerations
Platform usage	Amazon Connect channel usage, phone numbers, recordings, analytics, and associated AWS services
CRM licensing	Salesforce users, Service Cloud capability, storage, integrations, and administration
Implementation	Discovery, configuration, integrations, testing, data, security, training, launch, and stabilization
Ongoing operations	Platform administration, monitoring, releases, quality, knowledge, support, and governance

SECURITY, RESILIENCE, AND GOVERNANCE

Use role-based access and least privilege; encrypt data in transit and at rest; minimize sensitive data in attributes and logs; define recording and transcript retention; monitor routing, API, and synchronization failures; use retries, decoupled workflows, and graceful degradation; document CRM and contact-center outage procedures; and assign named ownership for releases, incidents, and recovery.

PROJECTED OUTCOMES

Targets include lower agent effort, stronger first-contact effectiveness, clearer ownership, trusted knowledge, connected quality-to-coaching workflows, more useful executive reporting, and lower avoidable operating cost. These outcomes require pilot and production validation.

PROFESSIONAL EVIDENCE

Relevant completed work includes approximately 35% estimated platform savings associated with an Amazon Connect migration, approximately 8% reduction in wait time, approximately 10% reduction in service-call escalations, and leadership across technical support, billing, collections, retention, quality, training, and CX technology. These proven outcomes are separate from the projected benefits of this conceptual case study.