Aspire: An Agentforce UX Case Study

Enhancing Luxury Concierge Service for Aspire with AI-Powered Summaries

ASPIRE
LIFESTYLES

Introduction

Team	Timeline	Role	Salesforce products
1 Lead experience architect	May - Jul 2025	Designing for AI	Agentforce
2 Developers		UIUX design and strategy	Service Cloud
2 Product owners		Journey mapping/Service blueprinting	(Data Cloud)

Context

Aspire, a luxury concierge service, prides itself on delivering personalised experiences. However, as their client base grew, their customer service reps spend excessive time reviewing lengthy call transcripts and case histories, particularly for complex food and wine requests. This led to slower response times and risked diluting high-quality service.

We used Einstein and Agentforce, Salesforce's AI technologies, to transform how reps manage customer interactions. I designed the end to end experience on the existing Aspire Service Cloud platform.

This was the first Agentforce project done by a product designer in the APAC ProServe team.

How might we empower Aspire's reps to deliver faster, more informed service without sacrificing the personal touch?

Outcome

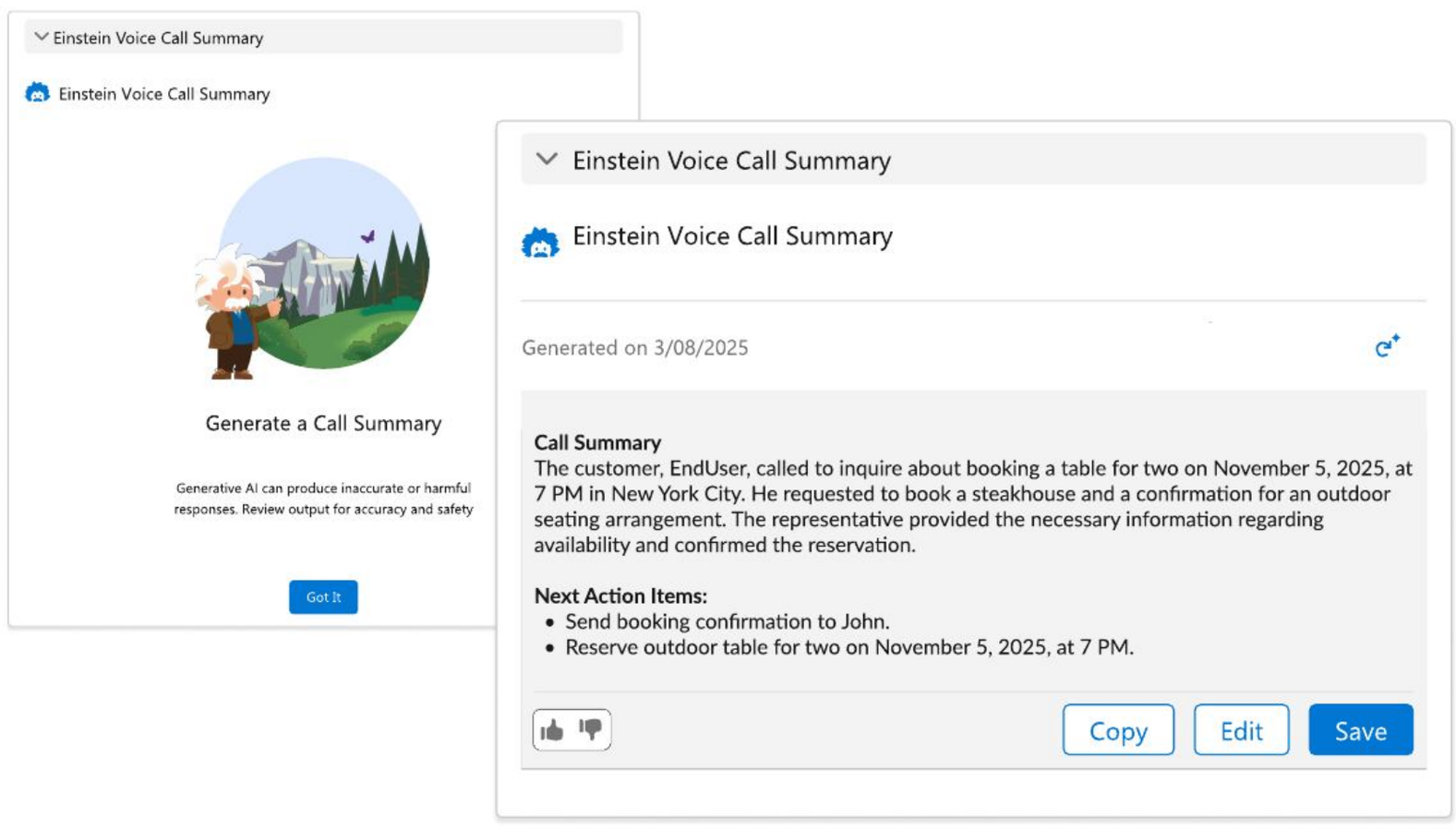
- Improved rep efficiency: Reduction of case handling from ~20mins/case to xx/case *(measured in pilot session)*
- Effortless interaction: Automatically capture every inbound/outbound conversation
- Enhanced customer understanding: Surface key points from conversations

Here's how it all happened~

Brief from Aspire

Capability	Business Objective	Scope Description
Conversation summaries	Summaries calls to provide - Summary of conversation - Key points - Next steps	**Prompt Template Configuration** 1. Configure up to (1) one prompt template for the generative model to summarize call transcripts. 2. Configure up to (1) one template to identify and extract information related to request type, dates, and request descriptions. **Data Model** 1. Create up to (1) one custom field to store the generated summary. **User Interface** 1. Create up to (1) one button on the case page layout to trigger the summarization action. 2. Update the case page layout to display the generated summary field prominently.
Field autofill	Automate field data input based on call transcript	**Prompt Template Configuration** 1. Configure up to (1) one prompt template for generative model to summarize call transcripts 2. Configure up to (1) one template can identify and extract information for dining request **User Interface** 1. Create up to (1) one button on the case page layout to trigger the summarization and auto-fill action 2. Create up to (1) one actions to auto-populate up to ten (10) fields for dining request e.g. cuisine, date, place, pax, dietary restriction 3. Develop up to (1) one LWC to display the auto-populated fields for user confirmation before updating the case object.

View prototype.



Approach

1

Establishing desired outcomes

Aligning on goals, current and future state

2

Ideating on Salesforce capabilities

Exploring AI solutions

3

Experimenting, designing...

within Salesforce; collaborating with devs

4

Gaining feedback and iterating

through a focus group

Understanding the rep's world

During kickoff, the Salesforce, Aspire and Vonage teams aligned on goals, namely to **improve rep efficiency and time savings.** We decided to start off small and agile, focusing on automation of reps' customer calls:

- Implement automated transcripts (Vonage scope of work)
- Automate summaries, key points and actions (Salesforce scope of work)

In the discovery sessions, it was crucial to understand the existing rep workflow. I initiated a discovery workshop with stakeholders to map out the end-to-end rep journey for a typical food and wine request.

XA Timeline & Deliverables
(for 3rd Discovery session)

Activity	Desired Outcome	Aspire's Role	Team Memb	
Align on scope (Customer journey, mid fi wireframes)	Shared understanding on experience and functional scope	Provide input on scope Validate current state build Confirm participants for focus group *(Synchronous)*	Salesforce: TA, Aspire: Key De	
Deep dive review of designs with technical team	Clarify what is feasible, ootb and custom (if needed)	Provide feedback (as needed) *(Asynchronous)*	Salesforce: TA, Aspire: Tech Le	
Design screens for use case 1 and 3	Create prototype to test with users	Review and approve design *(Asynchronous for ad-hoc questions; Synchronous for design checkpoints)*	Salesforce: XA Aspire: Design Key Decision Maker	6/20 (Fri) - 6/27 (Fri) Design checkpoint 6/27 Fri
Design screens for use case 2	Create prototype to test with users	Review and approve design *(Asynchronous for ad-hoc questions; Synchronous for design checkpoints)*	Salesforce: XA Aspire: Design Key Decision Maker	6/27 (Fri 7/4 (Fri) Design ch 7/4 Fri
Conduct focus group with internal Aspire team	Validate design, uncover user insights/areas of improvement	Share feedback and user context *(Synchronous for focus group)*	Salesforce: XA, TA, TCs Aspire: Focus group and Key Decision Maker	7/7 (Mo 7/9 (We
Document insights and enhancements	Prioritised enhancement list for iteration	Review and prioritise feedback *(Asynchronous)*	Salesforce: TA, XA, TCs Aspire: Key Decision Maker	7/7 (We 7/11 (Fri
Iterate design based on feedback	Validated detailed design for dev handoff	Review and approve revised design *(Asynchronous for ad-hoc questions; Synchronous for design checkpoints)*	Salesforce: XA, TA, TCs Aspire: Key Decision Maker	7/2 (We 7/11 (Fri Design ch 7/9 Wed

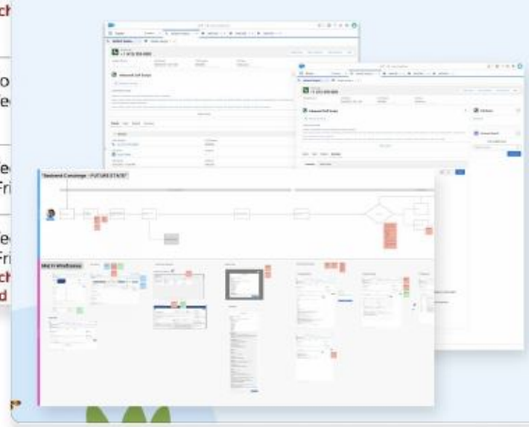
XA Role & Purpose

Establish the **end-to-end, north star journey** and experience strategy for AI-powered call summaries workflows

Bridge the gap between business goals, user workflows and needs and Salesforce platform capabilities – ensuring solutions are **valuable and feasible**

Validate the right experience before build, reducing rework and ensuring the first MVP solves real user problems

Future State Customer Journey & Screens
(Work-in-Progress, To be Discussed)



Access FigJam here

pw: aspire2025

The Aspire team gave a walkthrough of existing screens and rep's workflow.

Points of discussion include:

- Format of notes that reps tend to write in *(bullet points, paragraphs, table?)*
- Summary points to be included *(eg. time, location, no. of adults, special occasions, preferences)*
- Where the summary will be stored *(in Case Record page)*

Immersing into the Rep's world:

15-20min per case
Time spent just getting up to speed on the case

Information overload
Key details buried in calls and scattered notes

Inconsistent handovers
Transferred cases required reps to start their research from scratch

I mapped out the rep's current actions such as getting a call with a new customer, linking the Voice Call Record (VCR) to the Case and manually taking down notes in the Notes feature in Service Cloud.

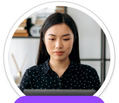
I linked user actions to existing screens from the sandbox. This enabled me to have a clearer picture on where the entrypoint and new automation feature will be.

Prior to this project, I also familiarised myself with Salesforce features Aspire had including
- Case records
- Benefits
- Agentforce capabilities and more

I also achieved Agentforce Agentblazer Innovator status - getting hands on with prompt builders to build summary agents sped up my understanding of Salesforce capabilities.

Frontline Luxury Rep

1st call with Customer *(10-20min)*



Taylor

Taylor is on the 1st call with a new Customer → Voice Call Record is automatically created → She links it to a Case or creates a Case → She creates Notes from Notes card in the Utility bar (Global Notes) → Mayumi jots information in the Call Notes widget **manually adding context or meta-data** to the free text.

She may note things like the date range or other context, **as the Customer provides it to her**.

She guides the conversation, but the customer says things in the order they are thinking about information, so there is a lot of movement and editing in the free text Call Notes view. → After Customer is done with their request, she ends the call → She catego improve sc comprehen

Questions/notes

2 ways of ID-ing the customer:
1. Manual search or
2. IVR Authentication

Only then is the Case created

Case is singular billing

Isabelle Tykesvaetta

How is transcript integrated into the Case record - Is this part of our scope?

Isabelle Tykesvaetta

There can be multiple voice calls for 1 case
Voice call is under Related tab in Case record

Isabelle Tykesvaetta

A: Manual or auto case creation:
2 ways:
1. If there is existing case, it is auto-linked to voice call
2. Create a new case and link it to the Voice Call

Methods of contacting Concierge:
- Voice call
- Omnichannel messaging (Whatsapp, Line, Kaokao etc)
- Email

Isabelle Tykesvaetta

Cases coming from Email, Omnichannel etc are not in scope
Does voice call have a particular case type?

Isabelle Tykesvaetta

What is the current build of transcripts?
1 voice call = 1 transcript
Are there multiple transcripts in 1 Case (eg in a Transcript tab under Case?)
Can we merge all transcripts to 1 then summarize that?
Anant - 1500 tokens can be used in a single transaction in Agentforce - will break the system but this is possible

Do users want summary per call or summary for 1 merged call?

Check with biz team to understand this

Team decision: Notes function will still exist in the utility bar. Users now will not need to take notes due to the summary

Notes will not be the source for this scope, only transcript

Isabelle Tykesvaetta

Note is automatically related to Voice Call

Has close to 13 Record Type of Cases - Anant

Isabelle Tykesvaetta

Record type should be Food and Wine?

How many use cases are there?

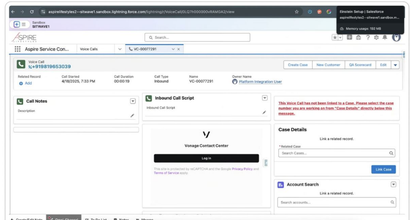
Isabelle Tykesvaetta

In future there will be different types of summary:
eg overall summary, voice call summary, etc
Consolidate the individual summaries to summarise everything

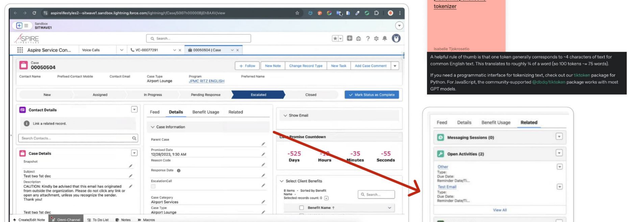
Isabelle Tykesvaetta

Screens from Anant

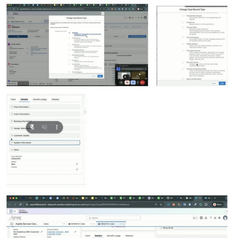
Voice Call Record



Case Record



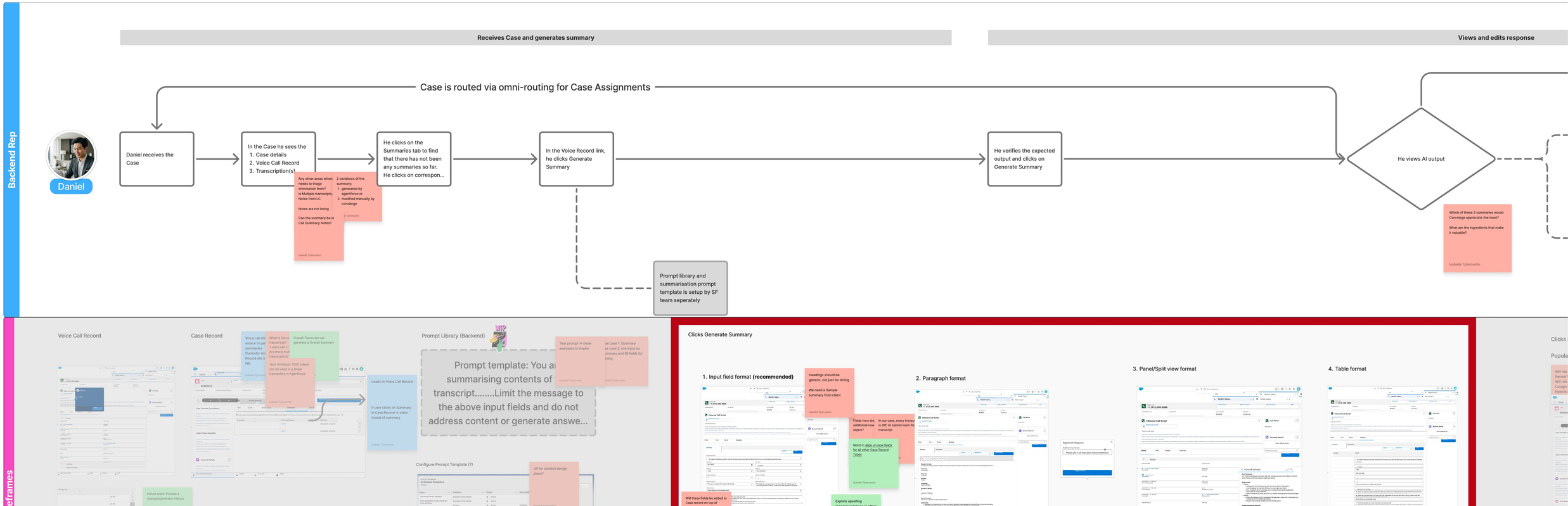
Case Record Type



Concurrently, I mapped out my designs along with the Future State Journey to ensure a seamless workflow.

I experimented with different summary layouts as highlighted below, namely:

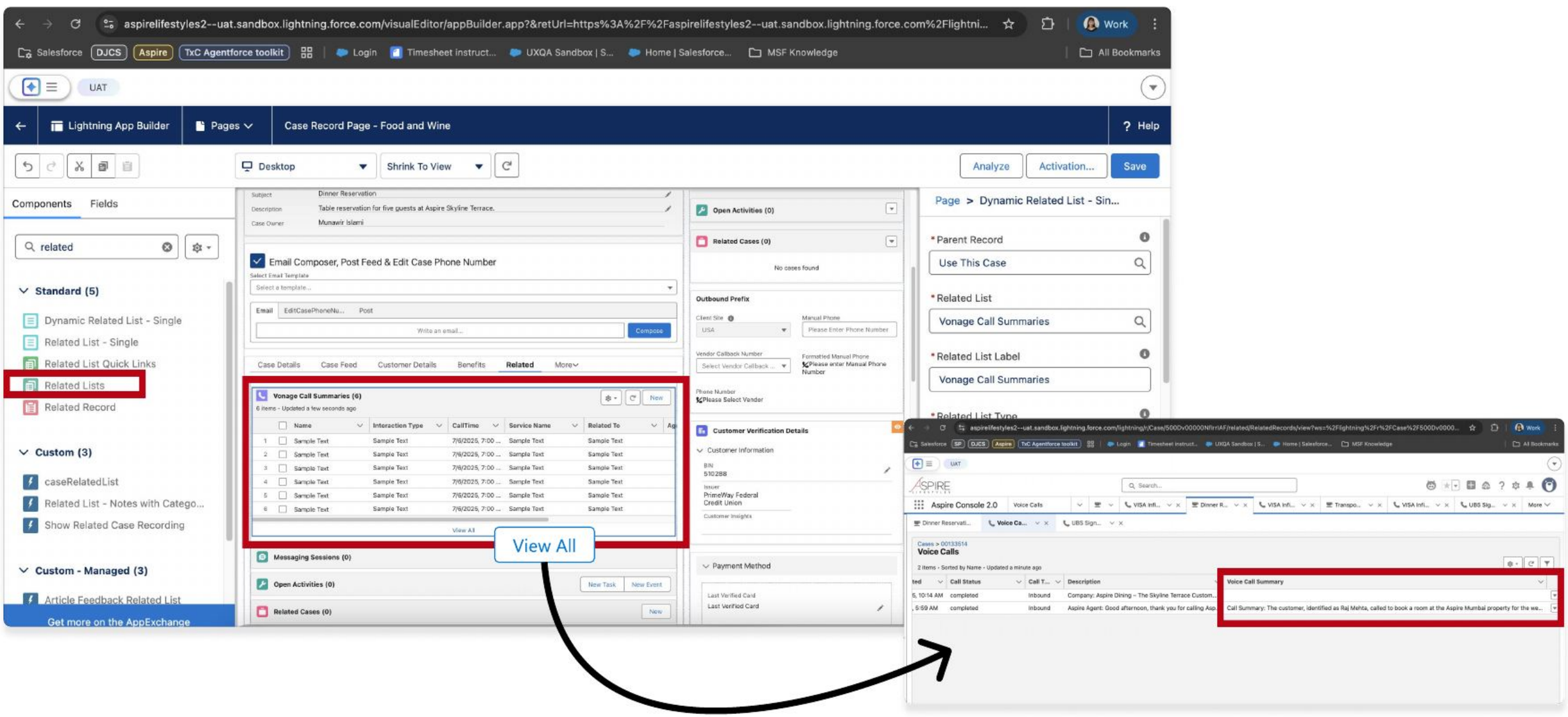
1. Input field format
2. Paragraph format
3. Split view format
4. Table format



Design & development

Along with Figma, I **designed in the Lightning App Builder** of the Aspire UAT environment to understand features and limitations. As with most Salesforce projects, we always tried to build **out-of-the-box (ootd) solutions first**, then consider customisations, and aligned frequently on this.

For example, the PO wanted to display VC summaries upfront. Going into the sandbox allowed me to see that all VC summaries associated with the case could be shown in the Case Record page directly, via a Related List standard object. Reps could also see a preview of all VC summaries *(right image)*.

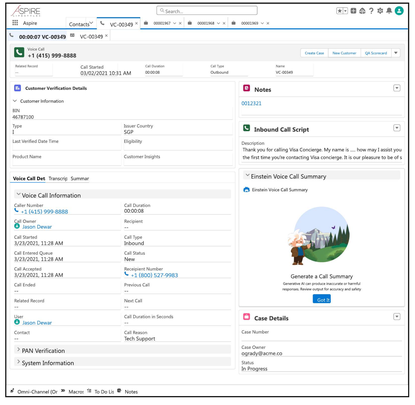


Signed off by Aspire

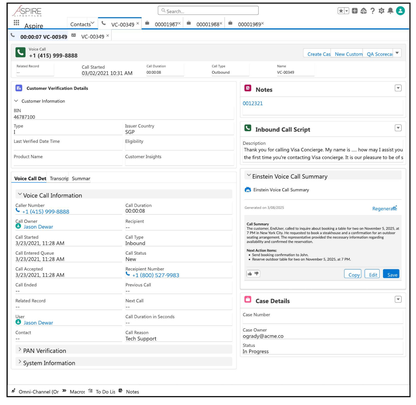
Voice Call Record

Note to developers
Last edit
Over time, summary will take over notes but for now Notes is still at the top

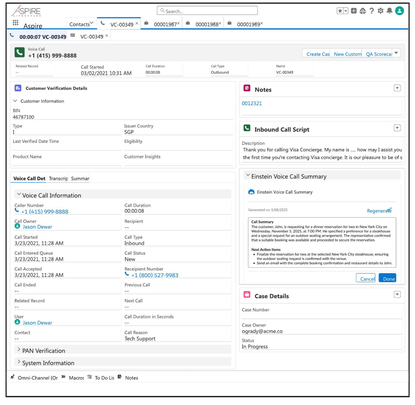
Agent ends call and Einstein VC Summary component is displayed



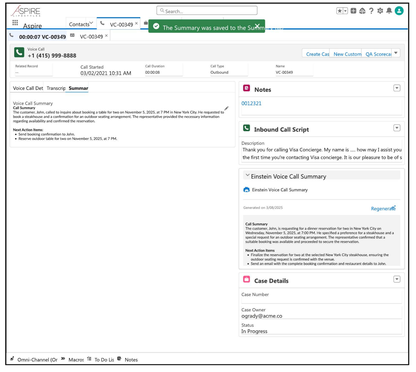
VC Summary generated



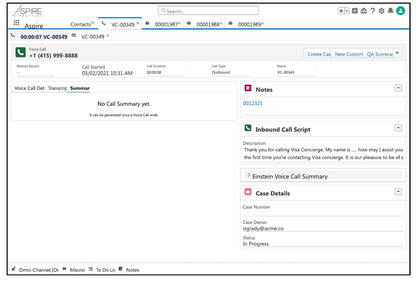
Editing VC Summary



Saved in Summary tab



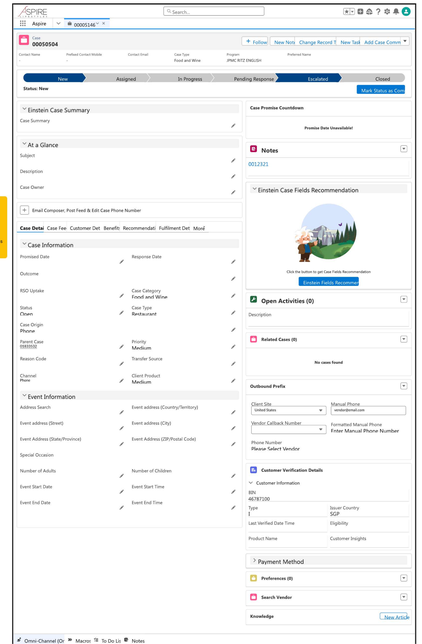
Summary tab empty state



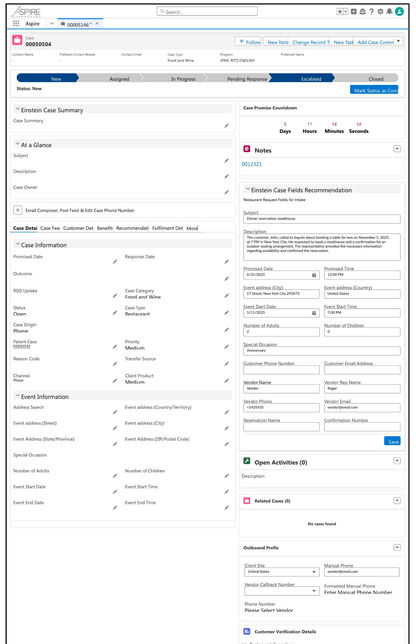
Signed off by Aspire

Case Record

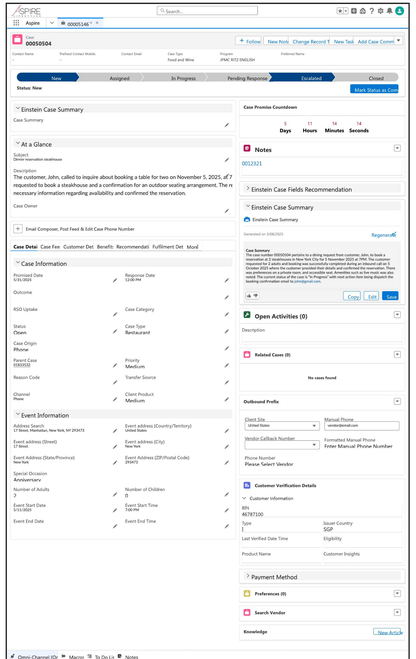
Case fields recommendation



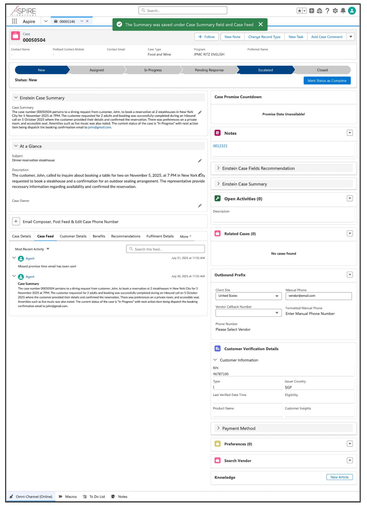
Generate autofill



Case Summary generated



Summary saved in case feed

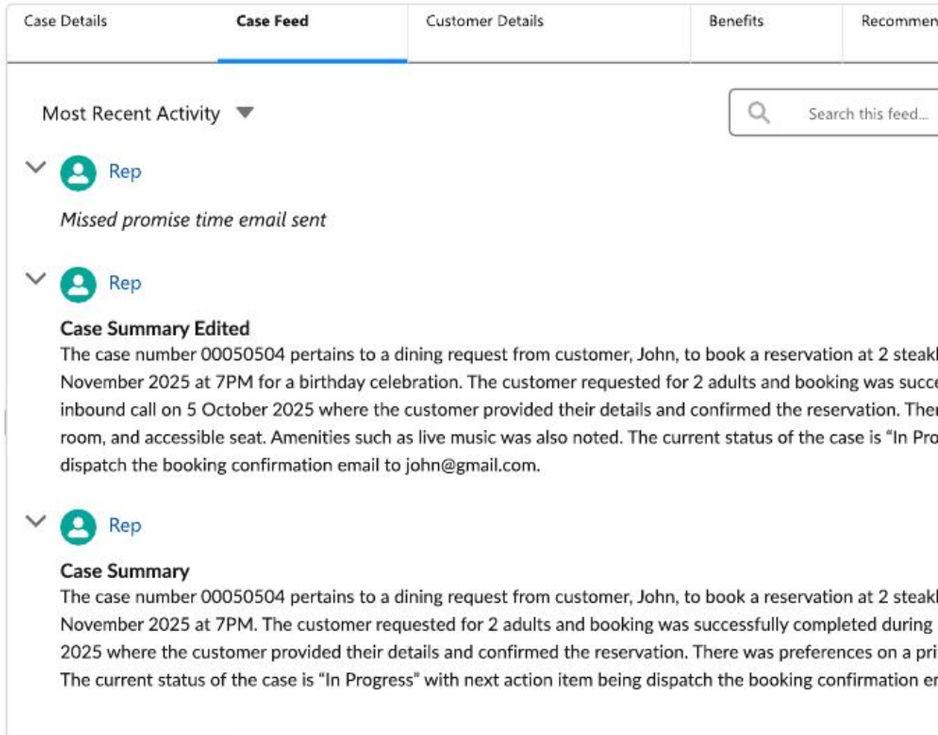


Gaining feedback and iterating

Once we had a working prototype, I led a focus group with Rep Managers to gather feedback. This session was invaluable for identifying usability issues and validating my design decisions. Users were excited over the idea of automating their work processes and using AI. As their excitement grew, so did their wish list. I took it back to the POs and devs to prioritise, as timeline was tight.

Below are some feedback that was used for MVP enhancement.

Request	Action
"Is there an audit trail of who edited the summaries?"	This was a critical gap. I used **Activity Timeline ootb component** which documented the user, timestamp and content for each edit, in the case feed section of the record. This addressed the need for accountability.
"Can we preview call summaries in the Case's Related tab?"	We added the VC summaries via the Related List object, as previously mentioned. This way users could see the request description, summary, related cases and more.
"Can we have 'Next Action Items' on both call and case summaries?"	Recognizing the value, I included this field in both components, prioritising its placement on the Case Summary as it guided users on the next steps.



Main takeaways

1

Managing scope creep

Having a fine balance of sowing seeds to expand the project vs managing expectations to deliver well

2

Designing for AI in Salesforce

Being hands-on with Salesforce while designing for a trustworthy and transparent system

3

Many moving parts in a tight timeline

Integrating with Vonage, multiple timezones across US, India, Australia

4

Pushback of focus group from devs

Highlighting the value of validating solutions before building them