CASE STUDY — AI & SERVICE TRANSFORMATION

From Zendesk to AI-Powered Service Cloud

How SaaS Business Advisors delivered a FedRAMP-compliant Salesforce Service Cloud migration with AI agent capabilities — deflecting 33% of support calls and exceeding the business case by 31%.

WHY SAAS BUSINESS ADVISORS

This was the second major transformation SaaS Business Advisors led for this client. The relationship was already built. The CIO and support leadership knew what they were getting: a team that could operate at the executive level, partner deeply with front-line teams, and hold the program together when complexity mounted.

For an AI-enabled service transformation, that combination matters more than it does in a traditional implementation. The decisions aren't just technical — they touch customers, support reps, content teams, and change management in ways that require judgment and experience to navigate.

> ***"SaaS Business Advisors helped us improve our User Acceptance Testing process — it was a critical step in continuing to understand the gaps and how to better address challenges."***
> — Client Stakeholder, $2B SaaS Company

Experience at scale

30 years leading complex, multi-dimensional transformations across business, IT, and operations.

Structured methodology

A proven six-stage framework that gives you clarity from day one and drives execution at pace.

Cross-functional fluency

We speak every language — from the CIO to the coder — and partner across every team and level.

Trusted advisor model

A confidant who will tell you the truth, hold people accountable, and stay focused on your outcomes.

2 of 4 This was the second of four engagements SaaS Business Advisors led for this client. Each one deepened the partnership and built on what came before.

THE SITUATION

The trigger was non-negotiable: FedRAMP compliance. Zendesk could not meet the security requirements the company needed, and with a government-adjacent customer base and growing enterprise commitments, the gap was no longer acceptable. The platform had to change.

But the company didn't just want a compliant replacement. They saw an opportunity. Support operations were running well — the processes were solid, the team was experienced — but the technology wasn't keeping pace. A move to Salesforce Service Cloud offered something Zendesk couldn't: a platform built for AI, integrated with the rest of the Salesforce ecosystem, and capable of delivering the intelligent, deflected, self-service experience that modern customers expect.

The vision was clear from the start: elevate customer support through AI-powered deflection, improve rep productivity for paid support tiers, and position the company as a leader in customer experience — all on a single, FedRAMP-compliant platform.

THE BUSINESS CASE

The program targeted four value streams: headcount savings through AI deflection, recurring software savings from decommissioning Zendesk, increased revenue through premium support tiers, and the strategic value of FedRAMP compliance. Against those targets, the program delivered — and then some.

33%	19%	$213K	31%
Call deflection — vs. 15% target	Increase in agent productivity	Annual recurring savings (Zendesk)	Business case exceeded at go-live

THE CHALLENGE

The support operation itself wasn't the problem. Processes were well-defined and the team was capable. The challenge was the technology — and more specifically, the gap between what the client imagined AI could do on day one and what it actually took to get there.

As the support team grew more familiar with Service Cloud, they developed a clearer picture of how they wanted the AI to behave — which meant requirements kept evolving. Getting a chatbot to deflect calls effectively requires continuous tuning, real-world testing, and a willingness to iterate. Managing that moving target while keeping the program on schedule required

disciplined scope management and consistent communication with both technical and business stakeholders.

A second challenge emerged around content. The team responsible for keeping the knowledge base current was understaffed and couldn't keep pace with product updates. Rather than wait for internal content to catch up, SaaS Business Advisors recommended a practical fix: anchor the AI's knowledge base to the public-facing website and product documentation, which were updated more regularly. It unblocked the program and improved AI response quality at the same time.

> ***"The client saw this as a technology problem. But it was also a change management problem — one that required additional communication with customers and focused training for the support staff."***

The hardest challenge was the most human one. Early planning underestimated how much customers value talking to a real person. Call deflection targets assume customers will choose the bot — but preferences don't change just because a new platform goes live. SaaS Business Advisors reframed the conversation: this wasn't just a technology deployment, it was a behavioral change program. That meant investing in customer communications, training support reps to champion the new experience, and accepting that adoption would be earned over time, not flipped at go-live.

THE APPROACH

SaaS Business Advisors partnered with the CIO and support leadership — VPs and Senior Directors — serving as the connective tissue between program strategy and day-to-day execution. With two additional vendors and three internal teams in play, the role was as much about coordination and alignment as it was about delivery.

One of the most significant contributions was strengthening the User Acceptance Testing process. UAT on an AI-powered support platform is not a checkbox — it's the primary mechanism for understanding what the bot gets right, what it misses, and where the gaps are between the intended experience and the actual one. By building a rigorous, iterative UAT process, the team created a feedback loop that caught issues early and continuously improved the system before and after go-live.

Defining success was itself a significant piece of work. The vision was clear; the metrics were not. SaaS Business Advisors worked closely with the client to establish baselines, define what "good" looked like, and build the measurement framework that allowed the business to track progress and make confident decisions going forward.

THE OUTCOME

The program was delivered on time and under budget, exceeding its business case by 31% at go-live.

Deflection & self-service

- 33% call deflection — 2× the 15% target
- 1,000 calls deflected in first 30 days
- Self-service live for all customer tiers

Rep productivity & cost

- 19% increase in agent productivity
- $213K annual savings from Zendesk
- $600K HC savings projected for 2026

Platform & compliance

- FedRAMP compliance delivered on time
- Single platform with 360° customer view
- Premium support revenue up 200% vs. target

The AI chatbot was subsequently replaced with Forethought as the client continued to evolve their AI capabilities. That decision is a testament to the program's success: the foundation was strong enough, and the team informed enough, to make a confident move to the next generation of tooling. The UAT process, the measurement framework, and the change management approach SaaS Business Advisors put in place remained — and continued to serve the team through the next transition.

LESSONS LEARNED

SaaS Business Advisors believes in sharing what programs teach us — not just what went well, but what we'd do differently. In AI deployments, candor is a competitive advantage.

AI technology moves fast. Plan to revisit your solution every 12–24 months and build programs that can adapt, not just deploy.

Stakeholder sign-off means nothing if they don't understand what they're approving. Invest in that clarity upfront.

Cost should not drive technology decisions. The right platform pays for itself. The wrong one costs more than the savings.

AI adoption is a change management problem as much as a technology one. Customer behavior doesn't change at go-live — it changes through communication, enablement, and time.

THE TAKEAWAY

AI-powered service transformation is not a technology project with a change management component. It's a people program enabled by technology — and the firms that treat it that way get dramatically better results. SaaS Business Advisors brought the experience to know the difference, the discipline to build the right foundation, and the candor to help the client see around corners. That's why this engagement became one of four — and why the work built here continued to deliver value long after go-live.

Salesforce Service Cloud · **AI Agent / Chatbot** · **FedRAMP Compliance** · **Zendesk Migration** · **Call Deflection** · **Change Management** · **UAT Process Design** · **SaaS**