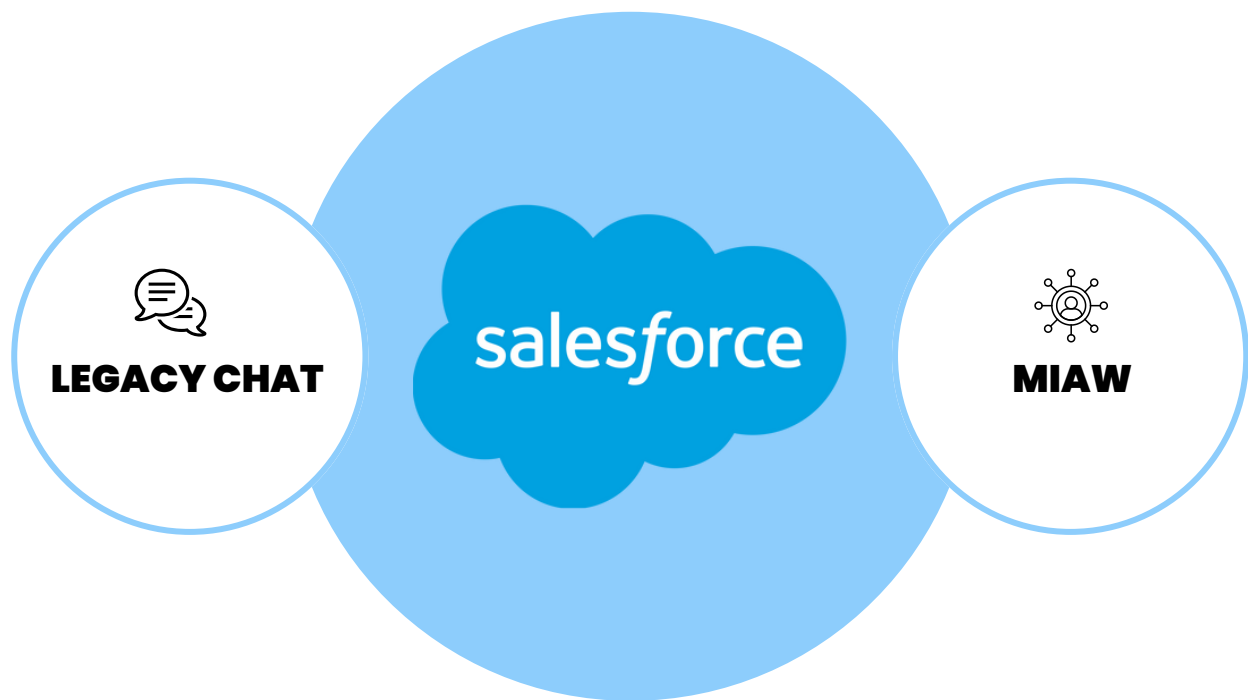


THE EXECUTIVE BLUEPRINT

switching from

LEGACY CHAT TO MIAW



*How Modern In-App & Web Messaging
Reinvents Customer Experiences, and Why It
Matters to Your Bottom Line*

BY ARIAN YOUSEFI



Introduction

THE NEW REALITY OF CUSTOMER COMMUNICATION

Customer expectations have evolved rapidly. They want fast, continuous, and frictionless communication on any device, without having to restart conversations or wait indefinitely for an agent. Meanwhile, **Salesforce's Legacy Chat**, though once a reliable solution, is now in maintenance-only mode. Its web-only, session-bound setup doesn't fully support today's omnichannel world or the fluid, asynchronous interactions that customers increasingly demand.

“ *Enter **Messaging for In-App & Web (MIAW)**, Salesforce's modern platform for today's omnichannel, mobile-first, multichannel era.* ”

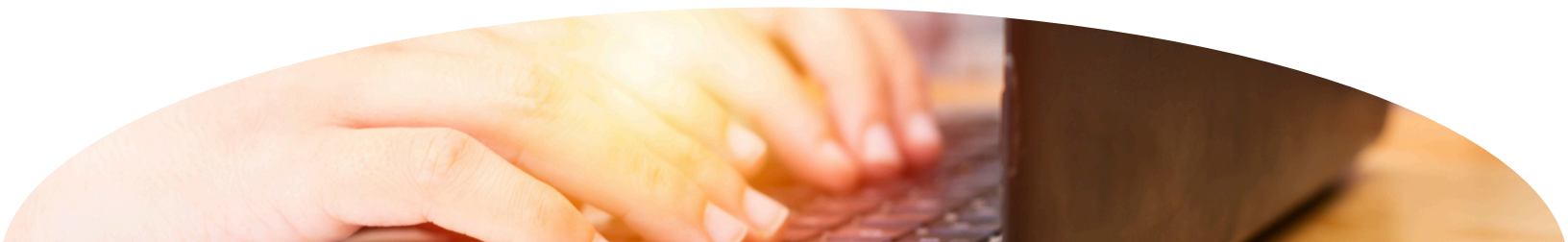
MIAW enables fluid, asynchronous communication that lets customers step away and return without losing the thread. It supports mobile apps, web, and social channels, all from one unified workspace. And it helps businesses in delivering experiences customers want while slashing support costs.

If you're an **executive deciding** whether to leap from **Legacy Chat**, this **blueprint will equip you to:**

- Understand what's at stake if you stay behind.
- Explore MIAW's edge over outdated solutions.
- Build a business case that aligns with strategic goals.

01 WHAT'S AT STAKE IF YOU STAY ON LEGACY CHAT?

- 1. Limited Channel Reach:** Legacy Chat operates primarily on websites, forcing customers to remain in a single browser session. **MIAW** expands support to mobile apps, social channels, etc., enabling seamless interactions wherever customers prefer.
- 2. Interrupted Customer Experiences:** Legacy Chat is synchronous, meaning the conversation ends if the browser closes or if the customer navigates away. **MIAW's** persistent, asynchronous messaging keeps the dialogue alive - days, even weeks later, significantly improving NPS.
- 3. Higher Support Costs:** Handling repetitive queries burns resources. **MIAW's** bot integration and asynchronous workflows reduce average handle times and agent fatigue, improving efficiency.
- 4. Basic Data Visibility:** Legacy Chat barely scratches the data surface. **MIAW** integrates seamlessly with Salesforce CRM, arming agents with customer history, purchases, and AI-driven insights to unlock upsells.
- 5. Lack of Future Readiness:** Legacy Chat is maintenance-only. No updates. No innovation. **MIAW** is continuously updated to keep pace with new channels, mobile functionality, and cloud innovations, positioning your organization for the long run.



02 THE MIAW ADVANTAGE: WHAT YOU GET

MIAW's multi-channel capabilities extend beyond traditional **web chat**, **supporting in-app messaging, SMS, and social platforms** to meet customers wherever they are. Its asynchronous communication model allows users to pause and resume conversations seamlessly, reducing drop-offs and repetitive queries. This continuity is further enhanced by MIAW's unique ability to carry conversation IDs across devices and channels, delivering a truly cohesive and flexible customer experience.

Under the hood, MIAW integrates deeply with Salesforce, offering agents real-time access to interaction history, purchase data, and customer details for context-rich resolutions. Advanced AI, powered by Einstein Bots, automates routine tasks, while MIAW's **lightweight architecture** leverages **server-side events (SSE)** for faster, cookie-free communication. Combined with Salesforce's infrastructure, MIAW gets scalability, security, and performance even at high message volumes. all while benefiting from frequent updates that incorporate cutting-edge innovations like **Flow-based routing and enhanced bot features.**

3 Reasons Why MIAW Stands out Technically

- 1 Multi-Channel Continuity:** Seamless conversations across devices, channels, and platforms.
- 2 Integrated Agent Efficiency:** Real-time insights, AI automation, and streamlined workflows.
- 3 Scalable, Secure, Fast:** Lightweight, cookie-free, and built for high-volume performance.



03

WHERE MIAW DIFFERS

(OR FALLS SHORT) COMPARED TO LEGACY CHAT

Despite its advantages, MIAW lacks a few features currently offered by Legacy Chat:

- ✓ **Preview of Customer Typing (Sneak Peek):** Legacy Chat sometimes lets agents see what customers type in real-time, while MIAW doesn't.
- ✓ **Queue Position Visibility:** Legacy Chat can display a customer's place in the queue, whereas MIAW typically employs proactive, asynchronous approaches without always revealing exact position.

However, these gaps often have workarounds or are on Salesforce's roadmap. Many organizations choose MIAW's asynchronous convenience, multi-channel reach, and ongoing enhancements over a few missing features, especially given the future-forward approach of the platform.

04 THE BUSINESS CASE FOR MIAW

Here's what MIAW means for your business

Lower Operational Costs

Bots and asynchronous conversations reduce repetitive interactions, cutting down on the number of agents needed per shift.

Higher Agent Throughput

By eliminating session restarts and enabling deeper context, MIAW allows agents to handle more inquiries without sacrificing quality.

Improved Customer Satisfaction & Retention

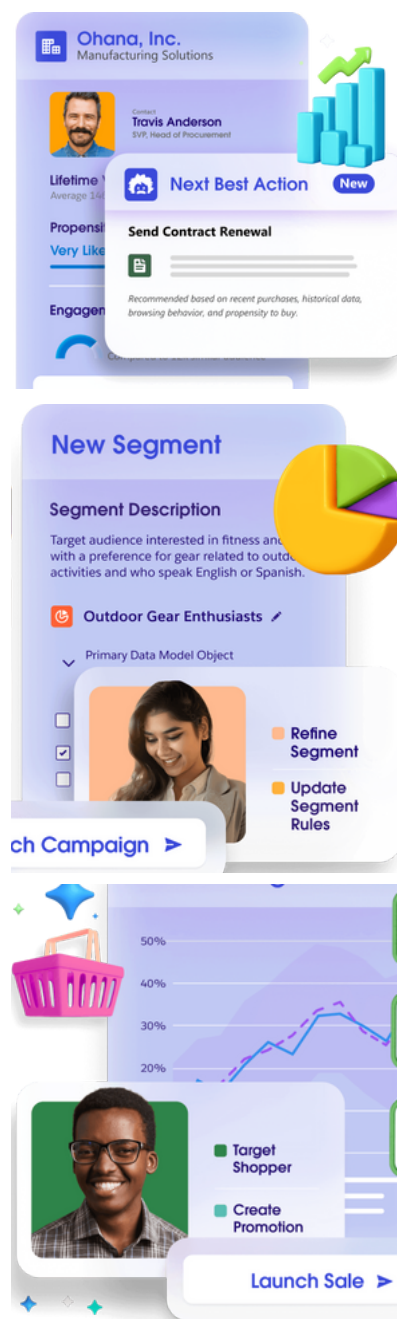
Persistent conversations and fluid interactions across devices mean fewer disruptions. Customers feel supported, increasing loyalty and brand advocacy.

Expanded Revenue Opportunities

With better CRM visibility, agents can identify upsell or cross-sell chances during or after a service interaction.

Reduced Risk of System Obsolescence

MIAW is actively maintained and upgraded, aligning your support operations with Salesforce's latest developments, thus mitigating risks associated with relying on an outdated solution.



05

AGENTFORCE

AN OPTIONAL BUT POWERFUL WORKSPACE UPGRADE

Adopting MIAW does not require switching to Agentforce (Salesforce's modern agent workspace), but using both together magnifies the benefits:



Collaboration? Effortless...

Agents and supervisors manage multiple interactions, transfer cases seamlessly, and coach in real time, all in one workspace.

Unified Omni Channel Experience

Unified view of every channel; chat, messaging, and social, supercharges agent productivity.

Smarter Routing, Happier Customers

AI-powered logic ensures the right inquiries reach the right agents at the right time, improving queue management and customer satisfaction.

Still, even without Agentforce, MIAW alone significantly modernizes customer engagement. With Agentforce, it's unstoppable.

HOW TO SWITCH TO MIAW (WITHOUT BREAKING A SWEAT)



Conduct a Gap Analysis: Start by mapping your current Legacy Chat workflows and identifying pain points. Evaluate how MIAW's asynchronous model can address these challenges. Take note of any Legacy Chat features you rely on, such as specific file attachment options, and plan for alternatives or workarounds to ensure a smooth transition.

MIAW isn't just messaging, it's the future of customer connection. Turn every interaction into an opportunity, every channel into an advantage, and every agent into a powerhouse of efficiency



Select Channels to Activate First:

Prioritize high-impact channels that will benefit most from MIAW, such as your website or mobile app. Once the initial deployment proves stable, gradually expand to include additional channels like SMS, WhatsApp, or social media to create a comprehensive omnichannel strategy.

Involve Stakeholders and Provide Training:

Engage your service leaders, IT team, and agents early in the process to ensure alignment and buy-in. Equip them with the necessary training to handle asynchronous conversations and utilize advanced agent tools effectively. Early involvement and preparation are key to a successful rollout.

Optimize with Bots and Flows:

Leverage Einstein Bots or custom Flow-based routing to streamline operations.

These tools can manage FAQs, collect initial customer data, and route more complex issues to the right agents, ensuring efficiency and improved customer experiences.

Monitor and Iterate:

Track critical KPIs such as customer satisfaction, average handle time, agent throughput, and repeat contact rates. Use these insights to fine-tune your processes, ensuring continuous improvement and optimal performance.



IN SUMMARY

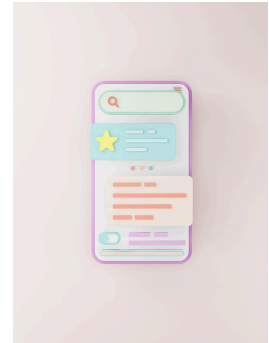
Migrating to MIAW? Keep it simple. Start by mapping out what's broken in your current chat setup and how MIAW fixes it. Activate your most impactful channels first like your app or website then scale to others like WhatsApp or SMS. Rally your team early, train them well, and let bots handle the repetitive stuff. Finally, track what works, tweak what doesn't, and keep leveling up. It's not about overhauling everything at once, it's about smart, focused steps that drive big wins. Let's make it happen.

07

REAL-WORLD EXAMPLES

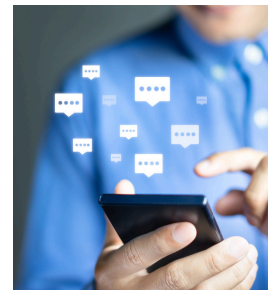
Financial Services Firm

Deployed MIAW on their mobile app to address account inquiries. Achieved a significant drop in repeat inquiries because customers no longer had to “start over” after closing the app.



Global Retail Brand

Migrated from Legacy Chat to MIAW with Agentforce. Noted a 20% increase in first-contact resolution by leveraging advanced context and AI-driven recommendations.



SaaS Provider

Incorporated bots to triage routine support issues, redirecting advanced queries to specialists. Reduced operational costs by 15-25% in the first year.



MIAW slashes costs, boosts resolutions, and kills the "start over" frustration. Seamless. Smart. Unstoppable.



Customer Send Message

NATIVE CHANNELS

WhatsApp Facebook Messenger SMS Short Codes

SMS Long Codes SMS Toll-Free Line

Messaging for in-app & Web Apple Messages for Business

EXTERNAL CHANNELS

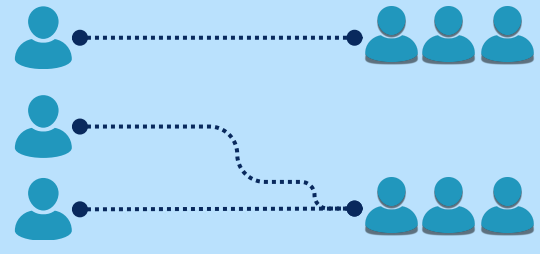
Bring your own Channel

Bring your own Channel for CCAAs

Omni-Channel Routes

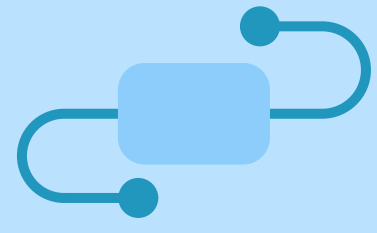
QUEUE-BASED ROUTING

For Simple routing scenarios



OMNI-CHANNEL FLOWS

Fore more complex routing needs, with AI Agents



OR

AI Agent or Reps Assist

QUEUE-BASED ROUTING



AI Agents or bots reduce the load on service reps



AI Agents or bots reduce the load on service reps

MESSAGING TOOLS IN THE SERVICE CONSOLE

- Auto-responses
- Automated notification
- Messaging components
- Session transfer
- Business-initiated sessions
- Supervisor whispers
- Audio messages

Supervisor Monitors

REPORTING TOOLS

Track messaging activity with custom report types and Data Cloud reporting



Continue customizing channels and updating routing logic as needed

OMNI SUPERVISOR

Assist service reps and track message volume in real time



About Us

At Truffle Consulting, we don't just implement Salesforce, we revolutionize it. With expertise in **Salesforce, MuleSoft, and AWS**, we redefine what's possible for tech-driven businesses. From hyper-personalized customer journeys to seamless integrations, we deliver solutions that don't just solve problems, they set new standards.

Big 4 results with boutique agility? That's the Truffle way.

LEADERSHIP THAT SETS US APART

Led by **Arian Yousefi**, one of the elite few Salesforce **Certified Technical Architects (CTA)** in the world, our team combines unmatched technical prowess with visionary leadership. Arian has scaled businesses, tackled the toughest digital transformations, and consistently turned **"impossible"** into **"done."**



Arian Yousefi

SEIZE THE FUTURE OF CUSTOMER ENGAGEMENT

Legacy Chat played its part, but it's out of sync with the direction of modern digital interactions. Messaging for In-App & Web aligns perfectly with an era where customers expect frictionless, flexible communication across devices and channels, without losing context or being forced to start over.



Switching to MIAW, your organization reduce operational costs, improve satisfaction and stay relevant. With Agentforce, MIAW significantly transforms customer engagement.

[CONTACT US NOW](#)

Enduring engagement, powerful CRM synergy, and a scalable platform; cornerstones of enterprise excellence.

Your customers demand better. Time to deliver.



SCAN TO CONNECT



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