

salesforce

DISRUPTIVE SERVICE

EMBRACE THE DIGITAL SERVICE REVOLUTION



Introduction

In recent years, advancements in technology have exponentially impacted how quickly and effectively customers are able to get what they want. This has triggered a sea change in rising expectations where the overall customer experience is concerned. In turn, customer service, once considered by many to be a cost center, can now provide a coveted point of differentiation.

All of which is to say, a business' success now largely depends on disrupting the traditional customer service model. So how can your business do that? In this paper, I'll answer that question – by describing a more disruptive model of customer service and, where applicable, explaining how Salesforce can support that model.

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CHAPTER 1

YOUR SERVICE IS YOUR BRAND

I agree that the “brand” of an organization is a combination of the quality of the item being offered, the cost and perceived value of the item, along with the experience of interacting with the organization through all the marketing, sales & service groups combined.

That said, there is a shortsighted view that the service group is only there to fix problems post-sale. As a result, sometimes the service group is viewed as a cost center and rarely garners the same attention and focus that the sales or marketing groups do.

However, in today’s shrinking global market, it’s easier than ever for customers to find a lower price, and perhaps due to this surplus of cheap, low-quality options, customers have begun ranking service much higher, if not highest, on their list of reasons to buy.

In short, the traditional role service plays in your brand is being dramatically disrupted, as increasingly, your service is becoming your brand. With that shift comes the need to change the way we look at service and how you provide it.



Service Isn't a Ticket; It's a Conversation

Many service requests involve multiple contacts. But even one-and-done tickets contribute to an overall service conversation between the customer and your organization. In order to keep up with your customers' needs and ensure their loyalty, you need to discard the common view that each interaction is a single request, and start to view each request as part of a much larger conversation.

However, you may be stymied by limited communication channels or be overloaded with multiple back-end solutions, each holding a different part of the answer to any given customer question. Therefore, the riddle to solve is being able to connect and track each contact, providing a full history to any agent interacting with the customer.



How can Salesforce help?

With Salesforce's Customer Success Platform, all the customer's information is in one place, linked to key marketing information such as campaigns or offers relevant to the customer. Order history and commerce transactions can also be made available to help service agents understand the total lifetime value (TLV) of the customer (or account or household). If you're looking to define trends and sentiment, Salesforce gives your whole team visibility into survey feedback and metrics such as case volume, repeated calls on a single issue, and declining spend.



Dazzling Service Is Dead, Low Customer Effort Is King

For a long time, we believed customers wanted to be dazzled. But in the book *The Effortless Experience*, that notion is disrupted by five years of statistics that prove what customers now want is the easiest, fastest experience. This makes reducing customer effort a priority for every business.

How hard is it for your customers to find out who to contact with a problem? Will they be left feeling frustrated with a partial solution or no solution at all? The harder they have to work for answers, and the less satisfactory those answers are, the quicker they'll be doing business with someone else.



How can Salesforce help?

The digital age has transformed how customers shop, but it has also transformed the way that customers can request service. Salesforce provides methods to aid in self-service deflection, along with offering multiple digital channels (chat, SMS, social, portals). Provide service to your customers on the channels they use everyday, combine those interactions into omni-channel conversations, and manage it all through the single Service Cloud platform.



BY THE NUMBERS

Salesforce Service Cloud customers saw an average 31% increase in faster case resolution.

Salesforce Customer Success Metrics Survey, conducted 2015-2017 among 7,000+ customers

CHAPTER 2

MANAGING A NEW WORLD OF CUSTOMER CHANNELS

In many ways, the biggest disruption to the traditional service model is the sheer volume of channels over which customers expect you to engage them. This is a challenge, but assessing and expanding your service channels can pay big dividends.

Let's say your customers always use the phone and you have very high CSAT scores. However what does it cost you to provide that level of service? Are the majority of phone calls considered low-risk or no-return interactions? What is the preferred channel for your key demographic, and is your CSAT score being inflated because it omits customers who don't engage with your current channels? The answers to these questions can help you build critical customer loyalty, and provide new efficiencies and cost savings.

In the following pages, I'll be reviewing each of the key channels and discussing how Salesforce can help you optimize their usage and derive the maximize benefit.



Phone System Integration

In order to provide the informed, personalized service modern customers expect, your agents need to have as much information as possible before picking up a call. However, there are still service teams working without even simple caller screen pop information – never mind integrations to back-end CRM platforms. So how do agents quickly locate information about the customer across multiple internal systems? Chances are, they don't.



How can Salesforce help?

Salesforce provides many computer telephony integration (CTI) options through the Salesforce AppExchange. Along with traditional on-premises PDX-based solutions, there are many choices, including a true cloud-to-cloud integration. All of the telephony functionality and call center specialization can be provided by the ISV solution, while your customer data stays secure in Salesforce, connected via an approved integration. When evaluating a CTI solution, look for the following features:

- Customer info screen pops that pull account, case, and order history together.
- Phone system IVR menus to help route incoming calls.
- Softphone integration for making VOIP or traditional PSTN calls.
- Advanced features like call recording for sentiment analysis and CSAT rating.



BY THE NUMBERS

Salesforce Service Cloud customers saw an average 32% increase in agent productivity.

Salesforce Customer Success Metrics Survey, conducted 2015-2017 among 7,000+ customers

Email Isn't Dead ... Yet

Despite reports of its pending demise, email continues to be a primary communication channel. It is estimated that there will be approximately 5.59 billion email accounts by 2019 (Radicati Group). Pushing clients to other support channels might be risky for some organizations. Better to continue offering email support, while making sure it's fully integrated into your service process.



How can Salesforce help?

The Salesforce Customer Success Platform provides integrated email support across sales, marketing and service. Some of the improvements offered include:

- **Email to case** - Stop having your support team monitor a shared email inbox. Move to an automated process that will route all incoming support emails to a service queue for proper triage and automated assignment.
- **Track milestones and SLA metrics** - When did the request arrive? How long did it take to resolve?
- **Assign cases effectively** - Assign by email address, time of day, or agent utilization metrics.
- **Consistent templates** - Need to respond or get clarification? The use of corporate templates will ensure consistent messaging to your customers.
- **Macros** - Encapsulate a set of steps and cut down on repetitive manual tasks.



BY THE NUMBERS

Salesforce Service Cloud customers saw an average 25% decrease in support costs.

Salesforce Customer Success Metrics Survey, conducted 2015-2017 among 7,000+ customers



Customer Self-Serve Portals

The TSIA “State of Support Services: 2017” document states the following: “Traditional channels, such as phone and email, remain common engagement channels throughout the industry, but for the first time in the history of TSIA benchmarking, incoming volume by self-service portal has surpassed the other channels.” So a preference for self-service is no longer just an emerging trend – and that means that building a strategic Customer Community will benefit both you and your customers.



How can Salesforce help?

Salesforce communities will augment and extend your customer interaction model, with a full suite of functionality that is easily deployed and maintained. Some key benefits include the option to:

- Enable customer self-service support, deflecting low-cost/low-risk requests.
- Let customers collaborate directly with your support teams via the portal.
- Drive up sell and cross-sell opportunities with every interaction. Are customers looking for warranty info? Provide extended warranty offers. Searching for part numbers? Provide options to buy replacements.
- Suggest relevant and popular knowledge articles that are current and valuable. Having this information as part of the public portal will allow it to be indexed by search engines. Since the majority of people start by doing a web search to solve their problem, your information will show up, driving visits to your portal.
- Stop using the crude “Contact Us” text box and guide customers with assisted forms. Capture mandatory information in the request form and then automatically display relevant articles. This is how deflection works; suggest options, and if not solved then submit the request.



BY THE NUMBERS

Salesforce community customers reported an average 50% deflection rate using self-service.

Forrester Research, Total Economic Impact of Salesforce Community Cloud on Customer Community

Quick Conversations with Chat and Chatbots

How do you communicate with your co-workers in the office? Do you phone them every time you have a question? Do you email them when you need a quick response? Chances are you are already using some kind of internal chat application that provides quick and easy access to your team. Today's customer wants the same type of access when asking quick and simple service questions, and if the only channels available are phone or email, they may go looking for a provider that's on their wavelength.



How can Salesforce help?

Salesforce provides a robust chat solution, and recently launched an AI-powered Chatbot that snaps in to your website and mobile apps to allow visitors who are reluctant to phone or too busy to open a web case to have a quick conversation with a service agent. This feature is fully integrated into our Customer Community and our Service Console. Some key features include the ability to:

- Track transcripts and actions directly in Service Cloud.
- Embed the Live Agent chat feature into mobile apps and existing websites.
- Control the chat availability based on agent workloads and skills.
- Use automated Einstein Chatbots as your first line of support to handle most simple requests or even start the process before handing off to a live person.



BY THE NUMBERS

44% of online consumers say, "Having questions answered by a live person while in the middle of an online purchase is one of the most important features a Web site can offer."

Forrester Research, Making Proactive Chat Work

SMS for Service Conversations

Text messages (SMS) have ushered in a revolution in personal communication and now in B2C communications. Receiving an SMS notification from your car dealership’s service department or your dentist about reminders is becoming commonplace. Checking into a hotel and then asking for fresh towels over an SMS conversation is convenient and practical. What does this mean for business-to-consumer communication? Customers may not always be in front of a computer, but they will likely have their smartphone handy.



How can Salesforce help?

Salesforce enables SMS service conversations via the LiveMessage offering. This tool allows service agents to provide two-way conversations while still remaining in the core Salesforce Service Console and treating the interaction as simply another channel. Apple’s ubiquitous iMessage service, which already takes the SMS concept to a new level, has recently introduced Apple Business Chat along with a Salesforce partnership to provide a direct integration with Service Cloud. This new offering will provide a rich media experience (selection screens, receipts), the highest level of encrypted security, and ease of discovery (integrated to maps, Safari, and Siri) across a global user base.



BY THE NUMBERS

50% shift in requests from email to SMS channel.

Activision customer reference story, Salesforce



Create a Social Community

Reimagine your brand as a social community that people will want to belong to. There are many examples of companies using social media for outbound communications only. Those companies are missing out on an opportunity to have meaningful, helpful conversations with their customers.

Creating a social community might be regarded as more of a marketing exercise, but I think it needs a strong service component. Brands do a fantastic job of promoting new products and garnering lots of attention. But when a customer has an issue, question, or conflicting opinion and posts that online, guess what? Everyone else in that social community will be watching to see how the brand handles it.



How can Salesforce help?

The Salesforce Customer Success Platform has features that let service and marketing teams manage interactions on Facebook, Twitter, Instagram, Weibo, G+, YouTube, and more. You might already have teams providing social media support using other tools, but the advantage of Salesforce is the seamless visibility it provides into all your other channels and customer information. It delivers a 360-degree view of your customers, without introducing more silo applications. Key features allow you to:

- Create cases and responses directly from the Service Console.
- Handle social media in the same console as email, voice, and other channels.
- Interact on Facebook, Twitter, Instagram, Weibo, G+, and more.
- Unify social data, CRM records, and service interactions.



BY THE NUMBERS

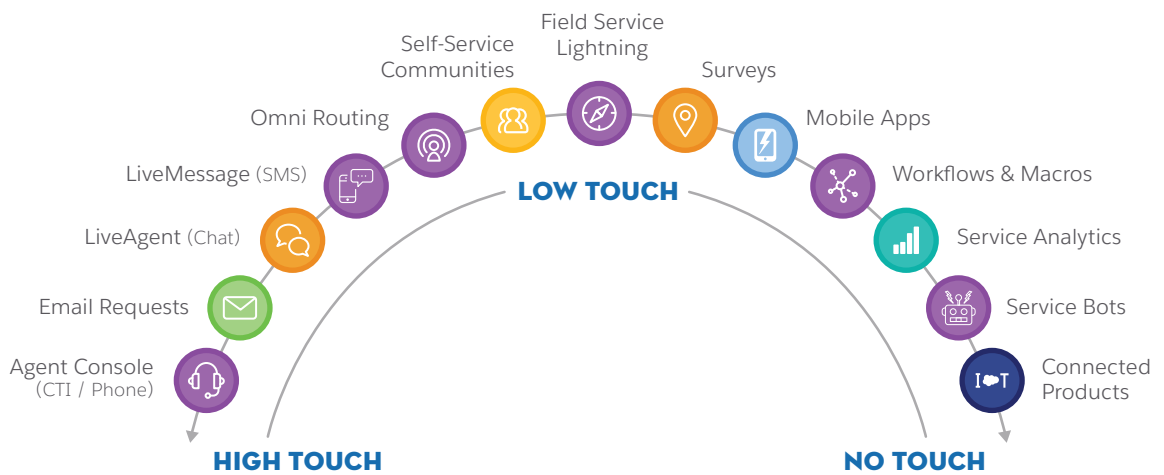
67% of people who used social media for service now prefer it over traditional channels.

Gartner Research

CHAPTER 3

DEFINING CHANNEL STRUCTURE

Selecting and managing your service channels is the first step – but realizing the maximum benefit of those channels requires some deep thinking about which of them you should be directing customers to, and for what purpose. The visualization below plots all possible channel interactions along a spectrum of high touch to no touch:





















The goal is to plot your own channels along this spectrum and define their ideal use case based on an audit of the cost and risk associated with your typical customer interactions.

On the most basic level, high-touch channels cost you more, so you'll want to reserve them for issues with higher risk and/or more complexity, like a customer who is considering returning your product. But you'll encounter many nuanced decisions as you weigh reductions in cost against increases in risk and vice versa. Giving careful thought to these decisions will make a dramatic difference in building customer loyalty and increasing your bottom line.

CHAPTER 3

To get you started, here is a hypothetical of how three scenarios might be handled before your audit (Current State) versus after your audit (Future State):

CURRENT STATE		
SCENARIO	CUSTOMER P.O.V.	ORGANIZATION RISK
 Spending time waiting on the phone for an order status update.	 Feeling inconvenienced by the wait.	 MEDIUM RISK Takes up valuable agent time answering simple questions. Increases overall time/inconvenience of other customers in phone queue. Decreases the quality of the interaction and customer satisfaction.
 Customer sending an email after-hours to add an extra part to an order shipping tomorrow morning.	 Feeling frustrated by the lack of control and lack of certainty regarding outcome. Will the message get through or will I receive an additional shipment?	 HIGH RISK Email could be missed or overlooked. The organization may incur the cost of separate shipping. Customer may source part from different supplier.
 Purchasing an expensive extended 2-year warranty, looking for details. Searches the internet for answers.	 Feeling confused and unable to commit to purchase due to conflicting information or competitor offers found in search.	 HIGH RISK Customer may abandon purchase, be misinformed by other sources, or enticed by competitor offers.

FUTURE STATE		
SCENARIO	CUSTOMER P.O.V.	ORGANIZATION RISK
 Engage with service agent via chat window to ask about shipping date.	 Feeling of easy access.	 LOW RISK Single agent can manage multiple chat requests. Also a great opportunity for automated Chatbot assistance.
 Customer can access web portal after-hours to add a critical part to an order shipping tomorrow. Marked urgent.	 Involved in the process, with possibility for immediate response (not in stock, can have in two days). Feeling empowered.	 MEDIUM RISK Customer is likely to make the additional order. Automated responses help. Agent alerted with “urgent” requests next morning.
 Purchasing an expensive extended 2-year warranty, looking for details. Knowledge articles served up real time. Access to “Contact Support” (live or deferred) option.	 Can review materials from vendor. Possible community to source other answers. Fall back on “Contact Support” if still unsure. Feeling supported.	 MEDIUM RISK With proper support information provided, customer is less likely to abandon purchase. Ability to participate and direct some of the conversations.

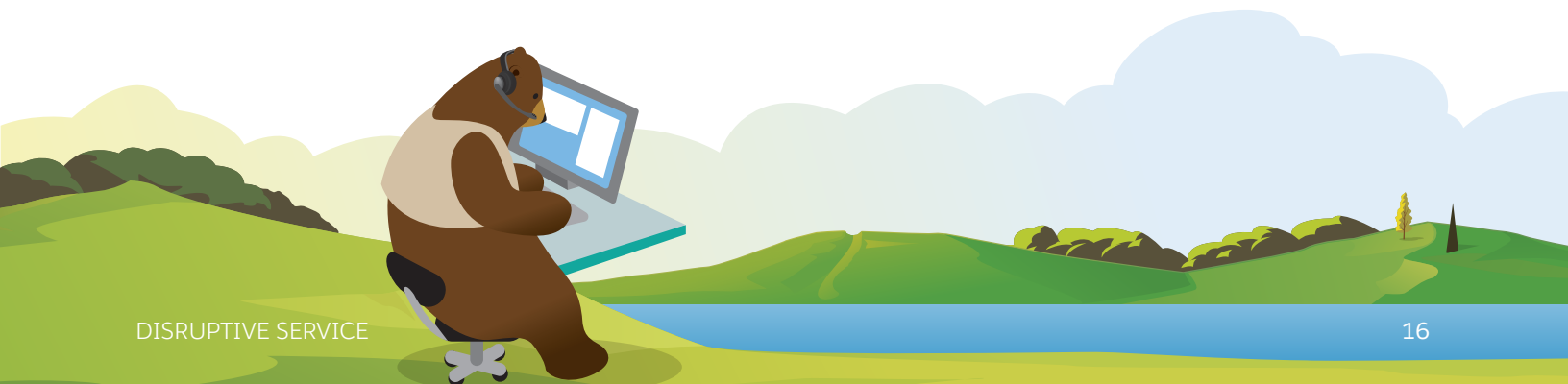


TRAINING YOUR CUSTOMERS

Some of you believe your customers are unlikely to use or accept new engagement methods. Well, it may surprise you to learn that I agree. Which is why I strongly believe in continuing to offer existing customers access to the channels they're used to. But whether you're looking to grow revenue, reduce costs, or otherwise improve your business, training new customers to engage with you differently is the key to serving them better and meeting your goals.

So, if chat is a better fit than the 800 number for some purposes, offer them both for now, but promote the chat option more robustly. And introduce other measure to train new customers, like:

- **Customer onboarding process** - Educate customers using simple welcome kits via email. "Thank you for your order. If you have questions please use our website to ensure the fastest service ..."
- **Awareness campaign** - Notify customers and the community at large that you are available to help. "Reach out via X, Y, Z ... We're here to help!" This could be part of a product launch or rebranding of your service offering.
- **Customer connection** - Reach out to existing customers, and let them know there are more ways to engage. Be transparent; tell them that you've made improvements to understand their needs and that this will result in faster resolutions with more options.



Conclusion

Your brand is increasingly defined by the level of service you offer.

So it's time to see the conversations you're having with customers in a new light. It's time to reshape your business to minimize customer effort. It's time to engage the right channels for every request.

If you're ready, the Salesforce Platform can help you at every step – from putting all your customer information in one, easily accessed location to building an optimized customer community, and more.

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