

salesforce

## Service Analytics

# Ensuring You're Ready for the Holiday Sales Season

HOW ANALYTICS CAN TURN CUSTOMER CHAOS INTO CUSTOMER SUCCESS

### Prioritize Open Cases

#### Case Scorecard

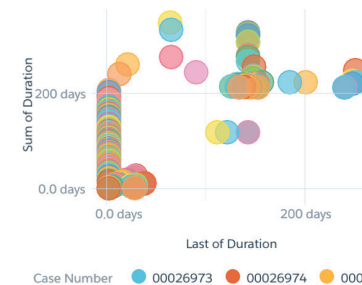
1,494  
Open Cases (Backlog)

10  
Agents

86  
Avg of Case Duration

14.5%  
Escalated Cases

#### Cases with long duration and no activity



#### Breakdown

# Introduction

With the holidays fast approaching, it's more important than ever to stay connected with your customer, which means you need to deliver a superior, end-to-end customer experience that differentiates your brand from everyone else in the marketplace. Customers expect connected, personalized service or they will switch to another company without a second thought.

As a consumer, you know good customer service when you experience it. Whether it's in person, online, or on the phone – whatever time of day or night – you want empowered, responsive agents who have all the relevant information at hand and who can provide solutions, not additional problems.

However, even as customer service evolves to become more convenient, conversational, and personalized, companies are left struggling to deliver services that match these growing expectations. So how can service managers find new ways to provide even better customer service? What's the difference between the leaders and those who don't quite make the mark?

**Service Analytics.** It's how you, as a manager, can turn information into deep, meaningful insights and become a trusted partner who really shows how you care for your customers. It's how you access a 360-degree, real-time view of data that's shareable across the entire service rep team so that no customer falls through the cracks. It's how you quickly scale knowledge to meet ever-changing customer needs.

Service Analytics is a powerful tool for customer service. It offers your entire service team a deeper understanding of customers and helps management track how the entire organization is working. This e-book highlights findings from a Peerless Insights customer service study and outlines four ways Service Analytics helps service managers and agents turn data into faster resolutions and happier customers.\*

- 1 **Develop Informed Operations**
- 2 **Make Reporting More Accurate and Easier**
- 3 **Learn More About Customers**
- 4 **Measure Your Performance**



# 1 Develop Informed Operations

**61%** of customer service professionals say numbers are out of date by the time they're presented.

You probably didn't go into business expecting to be a mind reader as well as the best service manager. Whether they're unhappy with receiving the wrong product, unable to reconcile a transaction, or just tired of repeating the same information over and over again just to speak to a live person, customers immediately expect your agents to understand their pain.

Unfortunately, customers tend to take out their aggravation on agents – which in turn can create a pattern of job dissatisfaction and increased turnover. Not good for customers, agents, or the business.

To make service a key part of your company's culture and give your customer support agents the backup they need, it's important to turn customer data into critical insights. With Service Analytics, you can improve:

**Service and Quality** – Meet and exceed customer expectations in quality, customer service, and responsiveness.

**Scalability** – Quickly move forward and support business growth of any size.

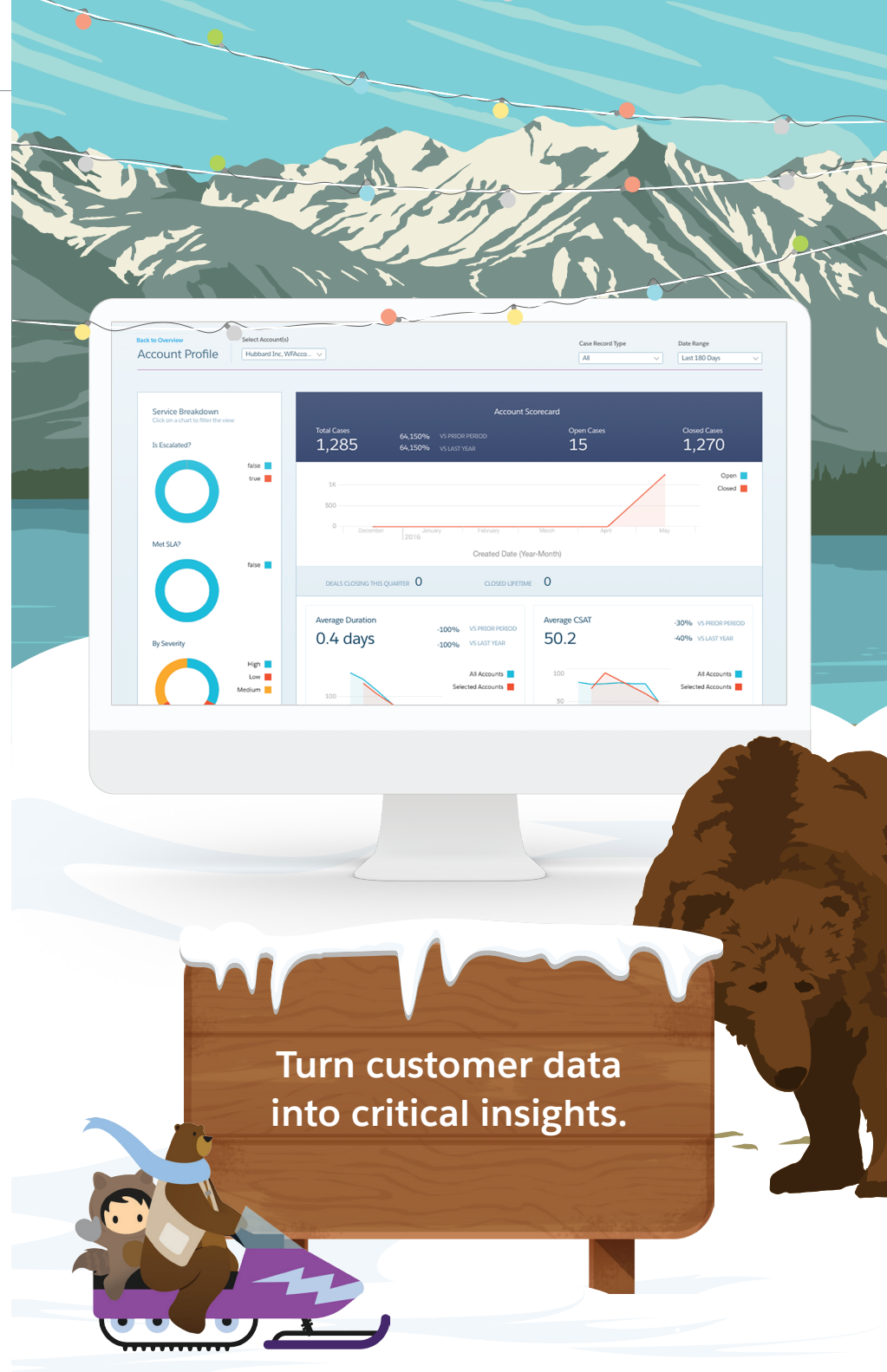
**Flexibility and Responsiveness** – Adapt and respond quickly to changing customer requirements and market conditions.

**Reliability** – Give management and agents the tools to provide a personalized customer experience.

Why is it so important to meet customer expectations with informed operations? Consulting firm Forrester reports that customer satisfaction correlates to customer loyalty, and loyalty corresponds to economic benefits. It has found that good service is pain-free, proactive, personalized, and delivered with maximum productivity.\*

Service Analytics allows you to understand your customers' pain points and see where you can make process changes to allow your team to do its best work.

\* Forrester, "Navigate the Future of Customer Service in 2014," February 6, 2014.



## 2 Make Reporting More Accurate and Easier

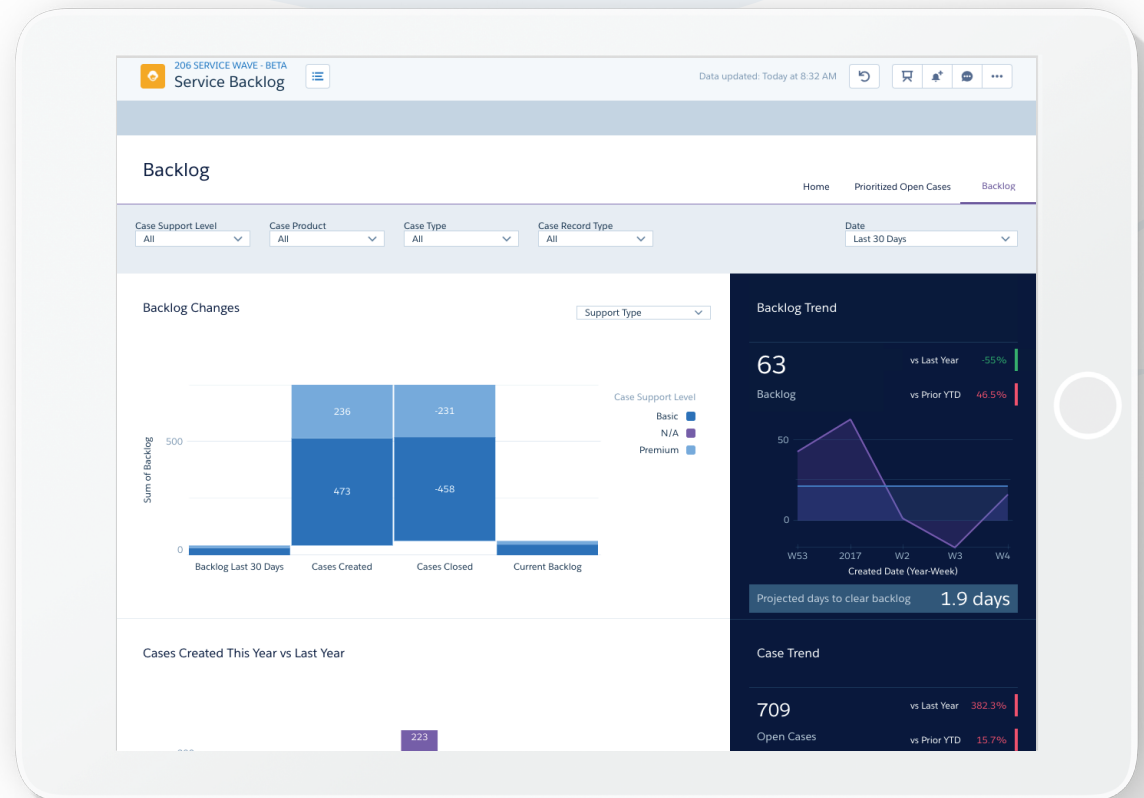
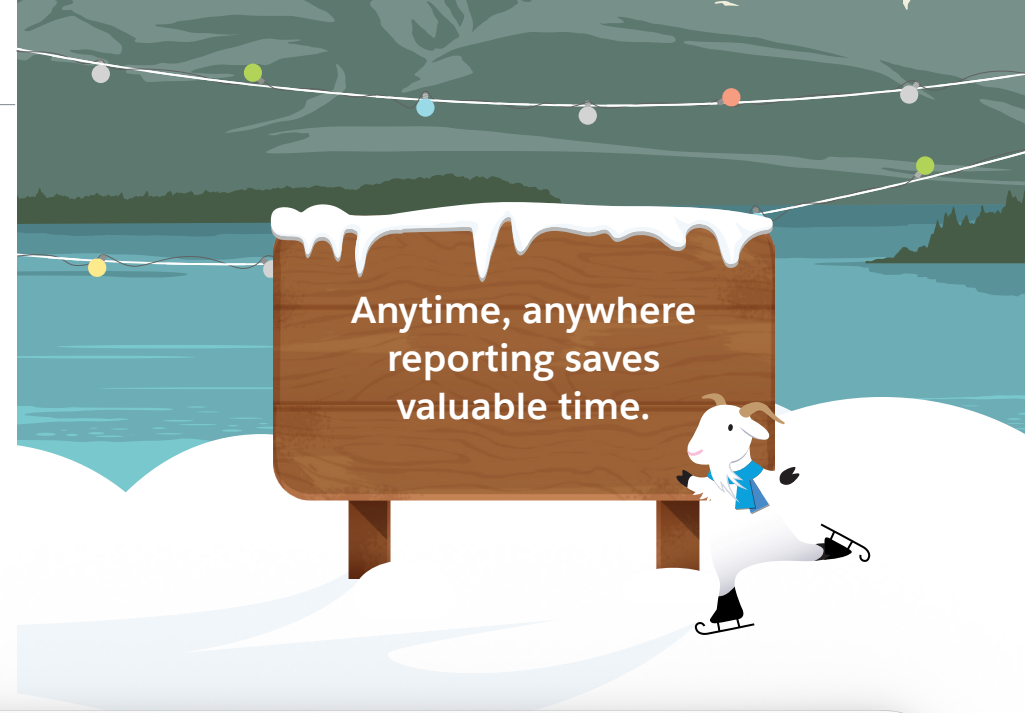
**60%** of respondents are concerned about varying information in different spreadsheets across the business.

**For your team, creating and customizing multiple reports equals wasted time.** Every day there are thousands of data points circulating throughout an organization. This information can provide new sales insights, shape product and marketing decisions, and give team members the action items they need to successfully do their jobs.

The downside is that reviewing data can be time consuming and repetitive – for example, referencing different databases again and again and then inputting that information into a variety of spreadsheets. Plus, data accuracy presents a problem, as reports are stale the minute they're printed.

That means teams are spending time creating out-of-date reports for Tuesday's 10 a.m. meeting, only to run another report after the meeting, another report on Friday as an update, and then the new report on the next Tuesday. It's confusing at best, and you never know whether your team has the most "current" report when members speak to customers or make business choices.

Using analytics and sharing data across the entire customer service organization – anytime, anywhere – can save valuable time, help agents take action, and spark the conversations and decisions that truly make a difference to a company's bottom line. As the front-line face of the company, customer service agents and their managers regularly create tasks, escalate cases, or open opportunities right from the point of insight to do their best work.





### 3 Learn More About Customers

**57%** of service professionals say it's not easy to drill down and analyze the numbers themselves.

**Your service team went into the profession to help people solve problems.** They're often part psychologist, part investigator, part salesperson – and 100% creative in digging deeper for the answers to resolve an issue.

Your teams are smart, experienced, and know what's going on. By giving them the tools to access accurate sales, product, and company data, they can do what they do best – excel at customer service. As a result, they will be able to not only help customers but do what's most important – retain them for the long term.

Arm your entire organization with the information people need to provide knowledgeable answers. This doesn't have to mean a choice between spreadsheet data and analytics; the ideal situation is finding a combination of the two that customizes reports that allow you to draw the right conclusions to make key assessments. These decisions include:

**Uncovering what makes sense for your organization's customer service team.** Understand customer-facing patterns, as well as rep-facing and technology trends that are shaping your company's customer service organization.

**Planning for improvements.** There's always room for improvement. Real-time data can help you review your current operations against best practices to focus on opportunities to move your business forward.

**Being proactive.** Analytics can help you decide next steps – whether you purchase a CRM solution, build it yourself, or outsource.

Additionally, by anticipating customer needs and acting on early warning signs, you can help keep customers satisfied and save your sales team significant time by being able to set up accounts that are consistently renewed rather than lost.



## 4 Measure Your Performance

**51%** say that decisions are made and actions are taken based on incomplete or no data because custom or ad hoc reports cannot be generated easily.

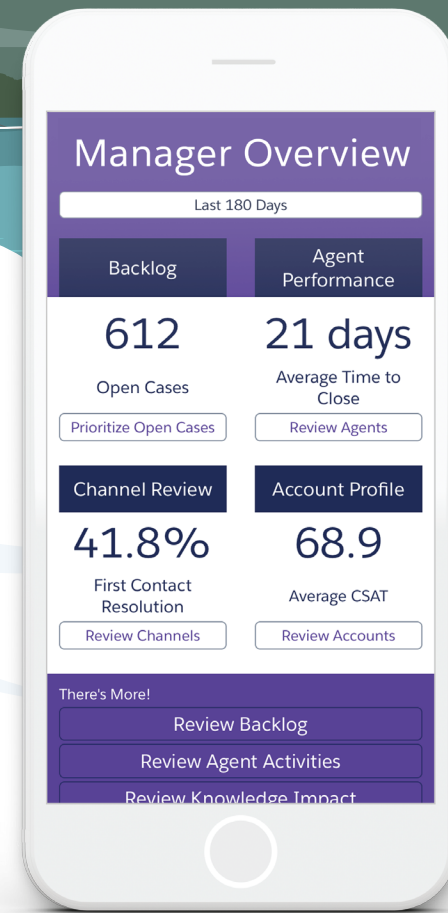
**Measurement is a critical element in every aspect of your team's work.**

Divisions and teams, as well as individual employees, all have KPIs and performance goals to meet. However, most measurements – such as customer wait times – are one dimensional.

Telling you that Customer A was on hold for 24 minutes with Agent B and it took 10 minutes to resolve the issue doesn't give managers or agents enough insights into the reasons why. Is it a service agent problem, a technology problem, a process problem, a lack of information problem – all of these or something else?

The truth is that many managers are relying on superficial and misleading data. Agents are also in the dark about their performance against outdated benchmarks.

Access to instant analytics helps tell the whole story to your entire organization. You receive faster answers to enable quicker collaboration and resolutions – and ultimately, happier customers. All of which helps to improve your service.



**Many managers rely on superficial and misleading data.**

# Conclusion

Analytics, specifically Service Analytics, can give your customer service department the tools to deliver that superior level of service customers demand. Service Analytics is designed for any type of data, from social media to CRM. Its seamless integration, instant actionability, centralized KPIs, and ability to provide faster answers help inspire smarter service, resulting in happier customers.

Analytics is changing industries and the ways companies think about – and act toward – their customers. Analytics fills in the gaps to get at the root of a company's challenges – whether they relate to process, finances, personnel, distribution, or products. Analytics is how you turn customer data into insights and transform your customer service team.

## Happy Holidays on the Shop Floor!

To learn more about Service Analytics and how it can help you connect to your customers in a whole new way, visit [salesforce.com/analytics](https://salesforce.com/analytics) or call 1-800-NO-SOFTWARE.

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