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WINNING WITH DATA-DRIVEN CUSTOMER SERVICE

Five Plays for Success

Introduction

Customer experience has overtaken price and product as the key brand differentiator, and it pays dividends for those that seize the opportunity: More than two-thirds of consumers say they're willing to spend on average 14% more with a company that they believe delivers excellent service,[1] and they're more than six times as likely to remain loyal.[2]

There's never been a better, or more pressing time for greater insight to customer service. New service channels create opportunities to balance and optimize interactions. Social media enables the immediate amplification of customer sentiment, requiring relentless focus on making the best decision during every customer engagement.

The Customer Experience Gap

Yet a void remains between systems of customer engagement, such as contact-center applications, and empowering customer service managers and agents with timely, data-driven insights to guide decisions and customer interactions.

Customer data, service information, and reporting are still largely in separate systems and spreadsheets. Agents remain largely in the dark about a customer's trends, behaviors, opportunities, and risks while they're engaging with them. Service managers feel overwhelmed with machine- and user-generated data from service channels, agents, customer satisfaction scores and sentiment indicators – data that should enable them to make smarter resourcing and coaching decisions, yet they simply don't have access to it.
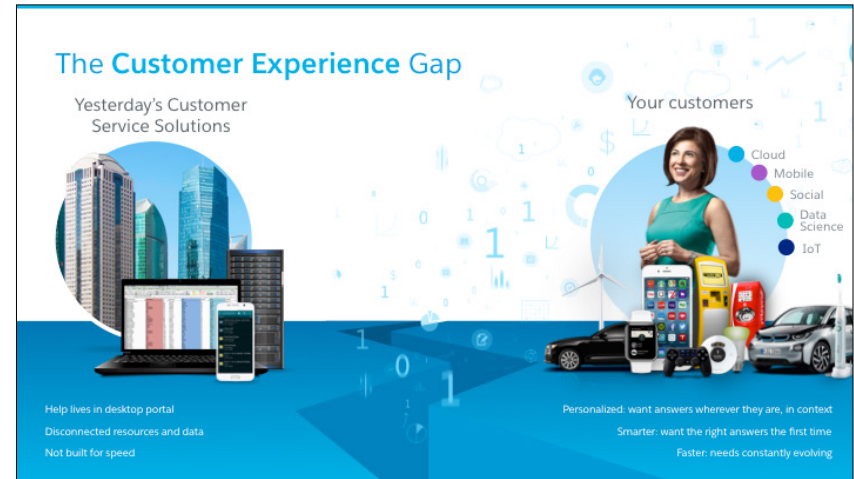
BRIDGING THE CUSTOMER EXPERIENCE GAP WITH
DATA-DRIVEN CUSTOMER SERVICE

The Data-Driven Customer Service Opportunity

Modern customer service systems provide a new opportunity, with analytics at the core. Because they're no longer separate tools and processes, they can embed data-driven insights to inform and guide every service decision from executive, to service manager, to the contact center agent at the point of interaction.

Efficiently and effectively driving customer satisfaction has never been more important. This white paper provides the five steps to success for your service organization, and beyond.

1. Create a Culture of Analytics in the Service Center

After surveying more than 2,000 business leaders, directors, and executives worldwide, Salesforce Research found that top-performing companies are focused on creating a culture of analytics.[3] In the contact center, it means placing timely, relevant data in the hands of more service professionals at every level so they can gain timely insights that help them provide effective service that improves customer loyalty.

Insight

Building loyalty with 5% more customers leads to an increased average profit per customer of between 25% and 100% (Bain[4]).

Without strategy and automation, contact center analytics can be hard. Salesforce found that 53% of organizations struggle to simply get data out of their systems of engagement, and 52% still rely on spreadsheets to analyze contact center trends and insight. It means too much time is spent creating reports rather than using the data to actually optimize processes or drive decisions. It leads to wasted opportunities to enhance agent and manager performance by using analytics during team meetings and customer interactions.

The Service Analytics Journey

Successfully embarking on your analytics journey requires understanding the roles in your service organization, what each role needs to make better decisions, and which metrics move the dial. Creating a culture of analytics for agents means providing actionable, contextual, and timely insights. Because if it's not relevant or helpful then it simply won't be used.

EXECS
- Multifunction
- Strategic
- Integrated

SERVICE MANAGERS
- Strategic and Tactical
- Team Performance
- CSAT

AGENTS
- Timely
- Contextual
- Actionable

CREATING A CULTURE OF ANALYTICS REQUIRES A ROLE-TAILORED EXPERIENCE FOR SERVICE-FOCUSED PROFESSIONALS

For contact center managers, it's easy to be overloaded with signals from multiple systems, onerous data prep, and constant requests for metrics. Instead, they need concise, clear, and timely metrics on customer satisfaction, agent performance, and service channels to make better strategic and tactical decisions. Being customer-centric simply isn't optional for executives – they require service and account metrics no matter what their role in the organization is. And everyone must speak the same language around metrics, data, and more importantly, customer satisfaction.

2. Operationalize the Metrics that Matter for Service Managers

The secret to equipping customer service managers with insight that moves the dial isn't just metrics and visualizations – it's choosing the right metrics, delivered at the right time, and managing to them.

SERVICE MANAGERS INTERPRET MULTIPLE SIGNALS TO INFORM AND BALANCE DECISION-MAKING

Manage Agent Performance to Drive CSAT

Insight
Fifty-two percent of customers have switched providers in the past year due to poor customer service, and the estimated business cost of switching due to poor service in the United States is $1.6 trillion (Accenture[5]).

Getting a clear perspective on agent performance and how interactions impact customer satisfaction scores (CSAT) is vital, so identifying top and bottom agents and trends in satisfaction and then taking action on coaching is crucial to elevate the team.

Managers must be able to quickly identify how effectively team members are at solving cases, how their CSAT stacks up, and how effective they are at driving satisfaction across products and channels. Managers must identify the effectiveness of teams and individual team members to decide if they're heading in the right direction.

Recommended CSAT Analytics
Measure the percentage change of CSAT for the previous year versus the prior period. Understand and monitor it over time for: agent and role, account, channel, reason and product, call duration, and volume.

Measure and Improve Agent Productivity

Insight

Seventy percent of customers cite poor customer service as a reason for not buying from a brand (McKinsey[6]).

Boosting CSAT efficiency requires a calibration of agent productivity. Agent productivity that's too low increases the cost of achieving a strong customer experience, and if it's too high it portends the risk of burnout among the most tenured agents. Managers need clear visibility into individual agent workload and how each agent's workload correlates to cases closed, first call resolution (FCR), case load and duration, and the impact on overall CSAT.

Recommended Agent Productivity Analytics

Measure average cases per agent versus team benchmark. Understand the percentage of cases that achieve first call resolution and those that are escalated. Get perspective by product, reason, origin, and other dimensions to identify opportunities to improve coaching and business processes.
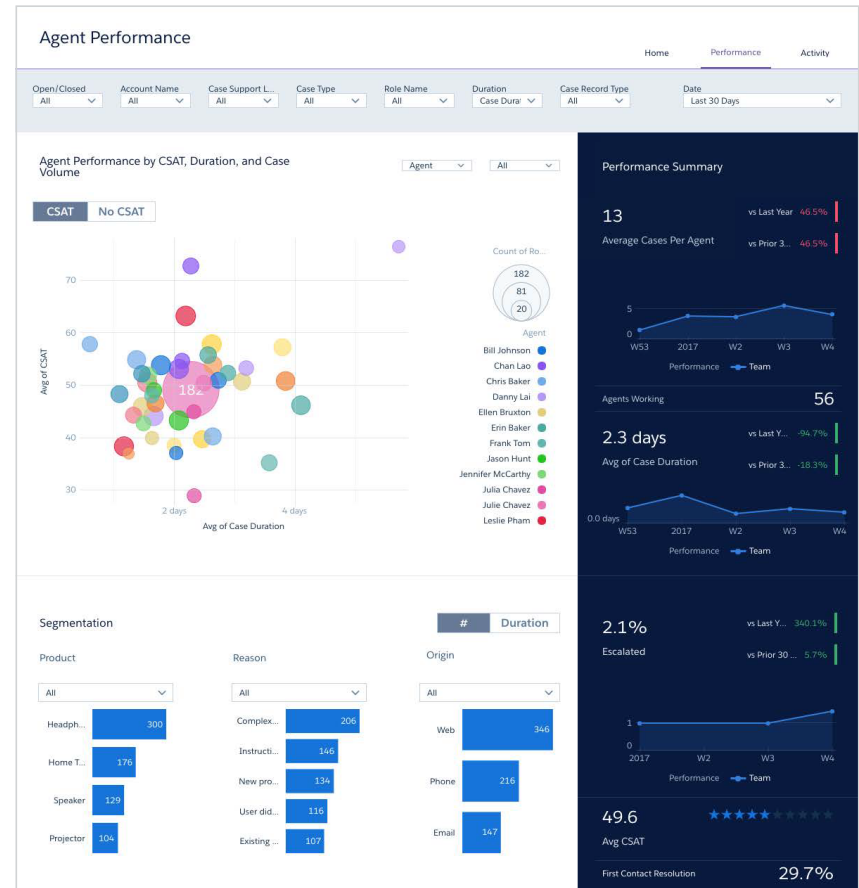
ANALYZING AGENT ACTIVITY AND PERFORMANCE ENSURES EFFICIENCY, PROACTIVE COACHING, AND CUSTOMER SATISFACTION

Optimize Service Channels with Insight

> ### Insight
> Thirty-three percent of customers say the lack of a consistent experience across channels led to negative feelings (Capgemini[7]).

Providing a seamless customer experience across online, phone, and social media channels is vital for satisfaction and net promoter score (NPS), as well as cost-effective service. The best service managers know which channels are performing well and how to balance them for different products or reasons so they're optimized. They have a clear understanding of the customer interaction channels that are the most effective in closing different cases.

> ### Recommended Service Channel Analytics
> With a clear breakout of your channels – phone, online, social media, and chat – apply metrics that show the number of cases closed and the percentage that were closed first time; the number of agents working various channels; the average CSAT and case duration; and the percentage that met service-level agreements (SLAs).

Understand Open Cases and the Backlog

> ### Insight
> According to J.D. Power, millennials are substantially more likely than baby boomers to reuse a product or service after a problem is resolved.[8]

The fact is, case management drives business results. Service managers need a clear line of sight to prioritize open cases and proactively manage the backlog. High-performing service managers monitor how many cases are high priority or are aging and if there are any escalations or cases that have not met SLA targets – and they can drill down to see escalated cases by product, agent, or customer.
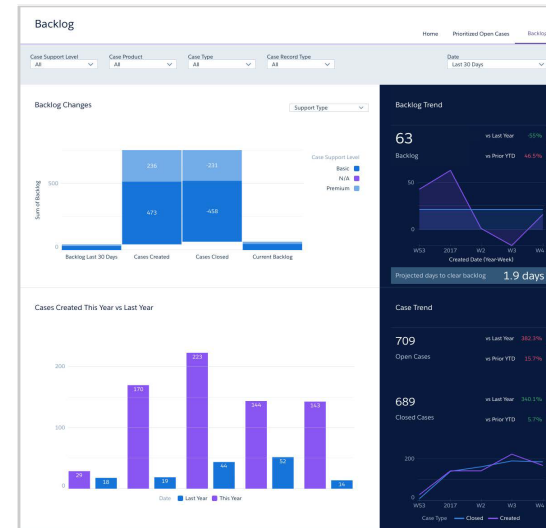
MANAGING THE BACKLOG REQUIRES SOUND STRATEGIES AND PRIORITIZATION

Backlog analytics empower managers to create resourcing, training, and channel strategies based on understanding trouble spots like product, or specific customer and case types. With backlog analytics, you can assess whether the backlog is building or declining, analyze volume trends, and project when the backlog will be cleared.

Recommended Open Case and Backlog Analytics

Managers must see all open cases, escalated cases and the percentage that are escalated, and where SLAs may have been jeopardized – segmented by status, priority, product, reason, and agent.

Waterfall visualizations should provide visibility on whether the backlog is growing or declining. Understanding the percentage change in the backlog and days to clear it versus previous periods facilitates decision-making around resourcing and effectiveness. Comparing new case volume versus prior periods based on different dimensions enables managers to allocate and train resources to manage incoming volume effectively.

Knowledge Management Measures

Insight

Only 36% of organizations say they have a proactive process to identify knowledge management gaps, yet 99% of customers say being connected with a knowledgeable agent is a prerequisite to a great customer experience (TSIA,[9] American Express[10]).

Effective knowledge management is a powerful driver of service, but do you know how articles and their usage are impacting and improving service or the time to solve cases? The key is understanding the difference that attaching articles to cases makes to service or call duration, which agents use articles, and how it impacts case outcomes. Knowledge-management metrics foster understanding of which agents are using articles effectively, help highlight coaching opportunities, and also enable identification of gaps in article coverage and knowledge.

Recommended Knowledge-Management Analytics

Understand which articles have the highest case-link rate, and the percentage of cases with articles attached. Measure the difference in performance in terms of satisfaction or duration of cases with or without articles – and break out the metrics by case type and product in order to identify opportunities to drive article creation.
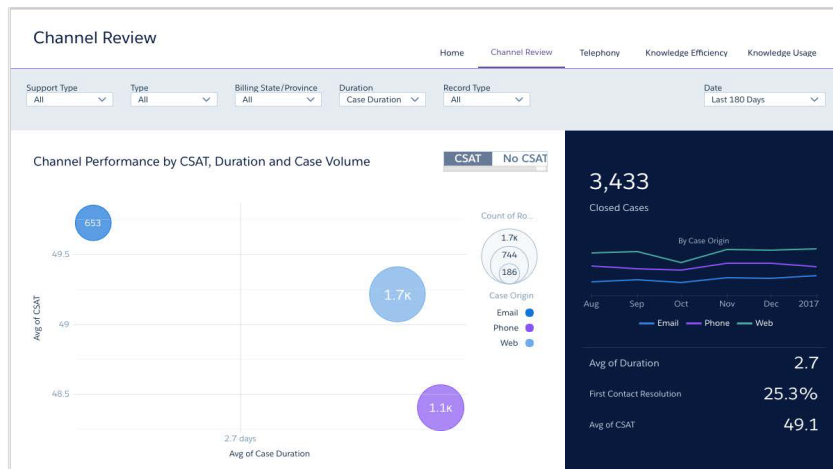
Call Volume Insight

Insight

Only 30% of contact center professionals rate their centers as successful at achieving the balance between call center efficiency and customer experience (ICMI[11]).

Clear perspective on trends in actual call volume provides visibility into staffing opportunities – from head count to type of agent – while reducing risk of burnout or declining customer satisfaction.

From aligning staff around when the most calls come in throughout the day or year, to understanding the drivers to successful – or unsuccessful – calls (like call duration), managers require both strategic and granular visibility. Analytics on case types and agents that take the longest, as well as the percentage of the day agents are working cases across channels, all provide valuable insights on how to staff for dynamic volume.

Recommended Call Volume Analytics

Key performance indicators (KPIs) should include total calls and agent occupancy, as well as important averages like calls per day, per agent, per case type, per hour, and call duration.

CLEAR VISIBILITY INTO CALL VOLUME DRIVES STAFFING, CUSTOMER SATISFACTION, AND EMPLOYEE ENGAGEMENT

3. Equipping Agents with Insight at the Point of Engagement

Insight

A totally satisfied customer contributes 2.6 times as much revenue as a somewhat satisfied customer (InfoQuest[12]).

Delivering great service isn't just about training and resourcing, it's about context. The best individual customer interactions are backed by analytics that empower not only managers but also individual agents by giving them the context they need for customer conversations and escalations.

For many organizations, analytics shouldn't stop at service – agents should have access to pending opportunities, recently closed deals, and sales metrics at the point of engagement. That way, sales, service, and customers are aligned – and agents have the right information to make the right decision at the right time.

Recommended Agent Analytics

Agents should be able to see a customer's history from many perspectives: CSAT, support, open deals, and number of cases closed and opened. The agent should also have a list of other agents who have helped the customer, as well as a clear perspective into open opportunity amounts, and closed opportunity revenue for the current quarter.

EQUIP AGENTS WITH EMBEDDED INSIGHT TO ALIGN SALES, SERVICE, AND CUSTOMER OUTCOMES

4. Embedded and Actionable Analytics Drives Adoption

Insight

According to McKinsey, embedding analytics in customer-facing functions like the service center is a key pillar of success for customer analytics, and 49% of companies who effectively use customer analytics are likely to have a profit well above their competitors.[13]

While providing analytics is clearly a driver for customer satisfaction, retention, and value creation, it's for naught if it's not adopted throughout the contact center. Embedding analytics within customer service systems and making it easy for agents to take action on them ensures adoption, and adoption drives results.

Driving Service Analytics Adoption: Embed Analytics in the Contact Center

To equip your agents and service managers with analytics they'll actually use to make decisions, it's crucial to embed them into daily case-management workflows. This means embedding analytics in cases and customer records so agents and service managers can make escalation decisions or steer the conversation at the point of engagement.

Make Taking Action Simple

Service managers and agents are primed to take action, so they need tools that help them convert insight into actual change. After an issue such as an aging case is identified, analytics should enable a manager or an agent to immediately create a task, update a case, or even share and collaborate with other team members. Not only do managers need to identify troublesome cases or critical customers, they also need to be able to drill down and make changes to tickets and tasks required to take action. Analytic apps that provide the functionality to create tasks, engage in collaboration, and schedule follow-up calls reduce the gap from insight to action.

Reduce Barriers to Analytics Expertise

What makes analytics effortless for service teams? Incorporating analytics has to feel like and be part of the system agents use every day via web or mobile. So analytics becomes part of the experience and is not simply bolted on to it, thereby minimizing agent training and speeding adoption.

5. Achieving a Connected Customer View

Insight

"If you're competitor focused, you have to wait until there is a competitor doing something. Being customer focused allows you to be more pioneering." – Jeff Bezos, Founder of Amazon.com[14]

Making call centers more efficient and focusing on customer satisfaction is just the beginning of the customer analytics journey. Customers have many journeys throughout an organization – marketing, sales, service, communities, and social media – all with rich veins of data ready to be tapped and unified to gain a unified picture.

With all of this, it's easy for organizations to create numerous customer data silos and barriers to collaboration without ever seeing the big picture across customer touchpoints – such as leads, sales, satisfaction, influence, upsell, and renewal.

Taking an integrated perspective ensures customer functions speak the same language around analytics, and that your organization gains 360-degree visibility across the customer value chain – creating a more consistent and coordinated experience for your organization and your customers.

Recommended Strategies for Success

Centralize customer data and coordinate shared metrics across marketing, sales, and service to enable an integrated, consistent view of customer performance. Provide managers with cross-functional visibility into metrics beyond those of their own department to spur collaboration.

For example, visibility into volume and type of net new customer additions for service managers enables more aligned and proactive service resourcing decisions, while for sales, understanding service measures provides an early warning of customer issues that may affect upsell, or that may risk churn. Executives should empower better strategic decision-making with a comprehensive view of all the metrics that matter, across all customer touchpoints.

THINKING STRATEGICALLY ABOUT CUSTOMER ANALYTICS IMPROVES COLLABORATION AND VALUE

The Salesforce Service Analytics Advantage

Salesforce Service Analytics provides a unified, native experience and a powerful application to deliver analytics for your managers and front line.

Drive Customer Satisfaction

Service Analytics is a ready-to-go analytics app for Service Cloud customers. Now, every service manager or agent can quickly gain customer visibility, track performance, and see satisfaction trends to drive business and customer service.

Get Insights for the Service Organization

Service Analytics delivers dynamic service dashboards to every service rep, on any device. For service managers, it delivers a new level of insight so they can see case trends, agent efficiency, and service-channel performance.

Act Fast, from Any Screen

Once you've identified a new service issue or uncovered a trend, you can quickly create a task, log a ticket, change a close date, or share insights on any device. Do it all without hunting through spreadsheets or navigating disconnected tools.

Get Immediate Results

Native integration means you can get up and running quickly with the speed, scale, and security of Salesforce. No hassle, and no more waiting around for IT.

Do More with Your Data

Service Analytics makes it easy to connect right to Service Cloud data, so now you can dynamically explore any information to spot trends and visualize key performance indicators, even using tablet, phone, and watch – enabling service-level insight from everywhere.

Built on the Einstein Analytics Platform

Powered by the Einstein Analytics Platform, Service Analytics works with Sales Analytics and other apps like Community Analytics to provide 360-degree customer analytics across every point of engagement.

Conclusion

Customer experience has become the single most important brand differentiator for companies in every industry. Consequently, service analytics represents a golden opportunity to win new customers and enhance existing loyalties. But in order to take advantage, companies need to create a culture of analytics with frontline employees, give managers the metrics that matter, and equip agents with insight at the point of customer interaction. This requires relevant and actionable analytics that empower the service organization and beyond to effectively and efficiently drive customer satisfaction, and increase overall customer value.

> To find out how you can turn service data into happier
>
> and more loyal customers, call 800-NO-SOFTWARE or visit
>
> **https://www.salesforce.com/products/einstein-analytics/service**

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