

A background image showing two women in an office setting. One woman, wearing a headset, is smiling and looking at a laptop screen. The other woman is leaning over her shoulder, also smiling and looking at the screen. The image has a soft, professional feel with a purple gradient bar at the bottom.

salesforce

service cloud

# THE FOUR PILLARS OF EFFORTLESS SERVICE

BRIDGING THE GAP BETWEEN CUSTOMER  
SERVICE VISION AND DELIVERY

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# 01 Introduction

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What customers want more than anything else is an effortless experience

# Introduction

In a new book, The Effortless Experience: Conquering the New Battleground for Customer Loyalty, the Corporate Executive Board (CEB), a leading member-based advisory committee for tens of thousands of organizations around the world, has made the case that what customer service organizations can do to drive customer loyalty more than anything else is providing customers with an effortless service experience. CEB defines loyal customers as those likely to purchase additional products and services from the same company thereby increasing their total spend or share of wallet with that company. CEB says loyal customers are also more likely to spread positive messages about that company through word of mouth, while disloyal customers are more likely to spread negative messages through word of mouth.

Using research based on over 125,000 customer interviews and over 5,000 customer service reps across over 100 companies, CEB has found that companies that provide effortless customer service experiences are 31% more likely to win repeat business and 88% of them were able to increase their share of wallet. Contrast this with companies that create high-effort customer experiences where a staggering 96% of customers become disloyal after such an experience. "Solve my problem quickly with minimal effort on my part" seems to be the mantra for preserving loyalty and winning repeat business. —

## Customer Experience Effortless vs. High-Effort

125,000+ Customer Interviews    5,000+ CSRs    100+ Companies

↑ Effortless Customer Experience

31%

More Likely To Win Repeat Business

88%

Increase Their Share Of Wallet

↓ High-Effort Customer Experience

96%

Disloyal After Such An Experience

Source: CEB



Chapter

# 02 The Four Pillars

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- Channel Stickiness
- Next Issue Avoidance
- Experience Engineering
- Frontline Control

# So how does a company provide effortless service?



In their research, Corporate Executive Board has put forward Four Pillars to reducing customer effort.

# Four Pillars

1

## Channel Stickiness

Ensure a customer's problem is solved

2

## Next Issue Avoidance

Ward off a potential call back by a customer

3

## Experience Engineering

Creating a positive perception of effort

4

## Frontline Control

Empower the frontline agents to use discretion

In this e-book, we will help you understand how to implement effortless service in your organization by breaking down each pillar put forward in the CEB research into the tangible capabilities you need to put in place. ...



Chapter

# 03 Channel Stickiness

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Ensure a customer's problem is solved



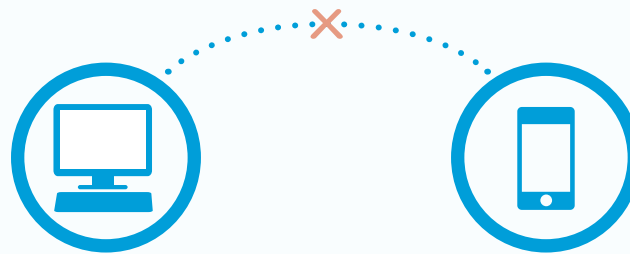
# Channel Stickiness

The principle behind Channel Stickiness is to ensure a customer's problem is solved the first time without them having to contact you a second time via a different channel.

Fifty-six percent of customers will first use self-service on the web to solve their problem, or these days, more likely on their mobile phone. But if they can't solve their problem the first time and have to call and speak to an agent, their level of effort goes drastically up. In a survey of more than 97,000 customers, CEB found that the need to contact the service organization multiple times to resolve an issue was one of the top three causes for high effort. In many ways, this reinforces the importance of First Call Resolution (FCR), a metric that has historically proven to have a high correlation to customer satisfaction.



## So how can you build Channel Stickiness?



# Delivering the right answer online—the first time:

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A strong web self-service presence helps your customers find answers quickly and reliably to their service issues. While most companies have invested in some form of web self-service, the way customers today connect with you and consume information has evolved, and web self-service must evolve with it. That means customers should be able to easily navigate and search for answers from their favorite smart phone or tablet. That also means allowing customers to quickly and easily search not only your internal FAQs, How to's, and Knowledge Articles, but also the online customer community where that question might already have been answered. Techniques like natural language search let customers can ask questions in a way that makes sense to them. It shouldn't matter if your customer goes to your website, mobile site, or Facebook page, they should receive the same answer every time. Only then will customers be more likely to solve their issue in the first channel they use and avoid unnecessary effort. Let's look at some of the components of modern Web self-service in more detail.

## Fostering Customer Communities

When customers search for an answer online—from how to upgrade their cable service to help with troubleshooting their tablet—chances are the top hit will be an answer to that question previously asked in a community. Like mobile, communities can no longer be a disconnected part of your self-service experience. Gone are the days where business happens in one place, and customers are social in another. Business is inherently social, be it how customers discover new products, purchase them, or receive service for them. The biggest frustration customers experience is clicking across different parts of your web or mobile site trying to find what they are looking for. From one simple search box, your customers should be able to quickly search across your internal knowledge base as well as past community interactions. Your loyal customers can be just as knowledgeable as your frontline agents. Harnessing that knowledge can help you not only increase first time self-service resolutions, but also increase positive word of mouth—a key driver of loyalty.

## A Best-in-Class Mobile Presence

More and more customers today begin their service journey on their smart phone. But if your mobile service site is inadequate or not correctly

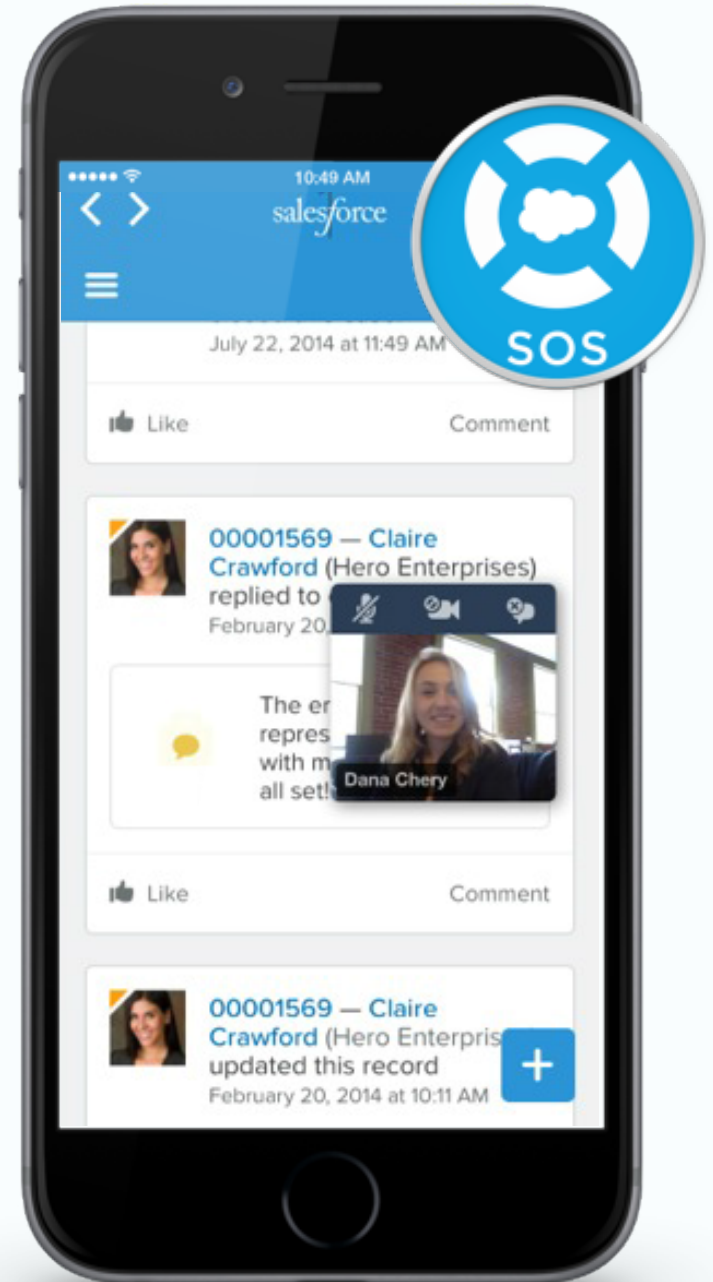
formatted for a mobile device, the customer will get frustrated and call your contact center, increasing their effort and your costs. If you've provided customers with a mobile app such as for online banking or e-commerce, it is critical to provide them with service from within the app. If not, customers have to leave your app, call an agent, and then log back in and find the spot they left off at, creating a high degree of customer effort. According to a recent report, 90% of mobile apps today have insufficient support. Customer service organizations must invest in delivering a best-in-class and effortless mobile service experience if they are to win and retain customers over the next five years.

## Concierge-Like Service

As the customer's issue increases in complexity from say, disputing a charge to troubleshooting your cable box, providing customers with step-by-step wizards to interactively guide them to the right solution greatly increases the odds of a successful resolution. With white-glove, concierge-like service the entire way—especially for your premium customers—you increase the chance that they will stay in-channel.

## Personalized “SOS” Experience

Service organizations can now deliver more personalized and interactive service than ever before. This is important because sometimes, the solution to a customer’s problem may require a series of steps that the customer isn’t familiar with. Or maybe the customer just wants someone to help them immediately and show them what to do. While an agent can describe the solution to a customer over the phone, after hanging up, the customer may still be confused. Salesforce SOS for Apps is an always-available help button located directly inside any mobile app. This innovative vision has inspired new technology allowing companies to embed an “SOS” button into their own mobile apps. By pushing the SOS button, users are able to enter a one-way video chat with a support agent, and that agent is able to provide them with on-screen guided assistance to walk them through their issue on any mobile device. Additionally, agents can annotate or “draw” on customer’s screens to guide them to the right answer. This tremendously reduces the effort required of the customer to solve the issue themselves and significantly reduces the likelihood of an escalation.

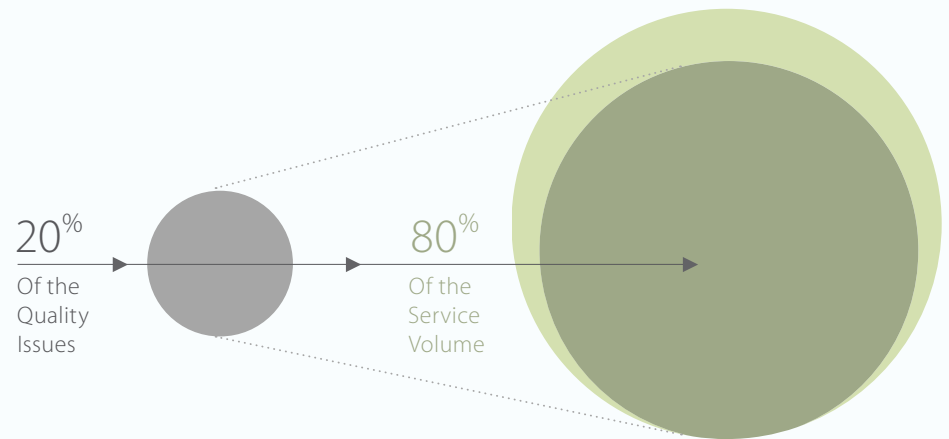


## Learn and Refine

If you're an e-commerce company, returning a product or disputing a charge may be your most frequent service request. For a telecom company, it may be upgrading an account. Every business will have its own 80-20 rule where 20% of issues account for 80% of the service volume. Detailed and interactive analytics will give you the ability to not only report on the most common issues your service organization receives, but more importantly, which issues are most likely to result in an escalation. Understanding which issues are causing you the most grief will help you allocate service dollars in the most effective way possible and ensure your internal experts are spending time solving the most pressing problems.

Are most channel switching issues related to a known problem? Publish a fix, front and center where your users can easily find it, be it in your mobile app, or on your Website or Facebook page. If billing issues are the culprit, create a billing FAQ and post it on the same page where customers view their bill. Analytics are a powerful way for managers and executives to identify the root cause of customer effort and create mitigating solutions before the problem persists and spreads.

## Customer Service Volume 80/20 Rule



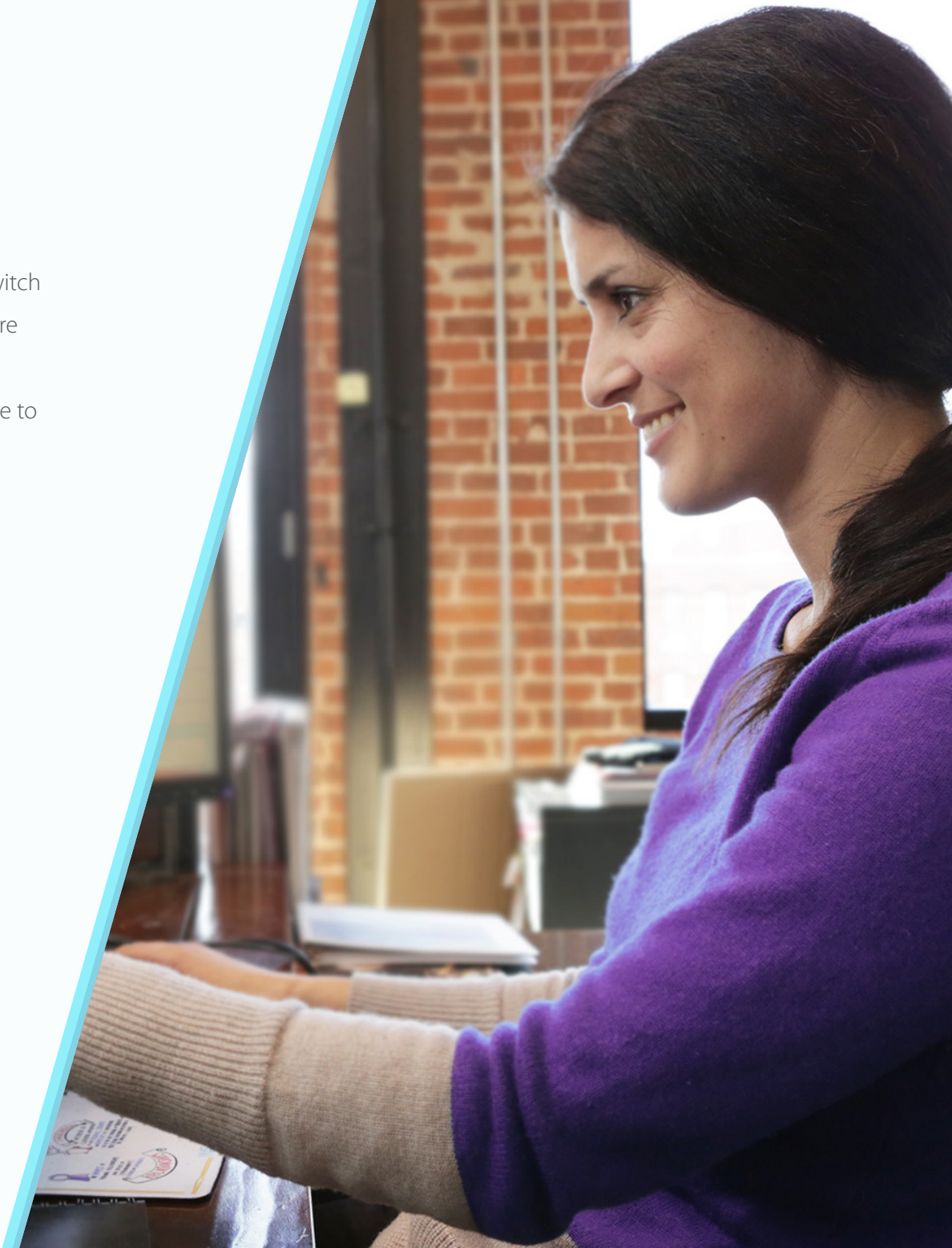


## Easy and Graceful Escalation

While the goal should be for 100% of customers to never have to switch channels, there will always be customers who can't find what they are looking for and pick up the phone or send an email. While you can't completely eliminate channel switching, there are steps you can take to ensure the process is as smooth and easy as possible.

**1- Don't make customers repeat information:** In its research, CEB found that having to repeat information was one of the biggest offenders, annoying customers and increasing effort. Think multi-channel service from day one. Make sure the entire interaction history of a case regardless of channel is easily accessible to every agent, so that agents never have to ask customers to repeat themselves

**2- Guide them before they escalate:** Setup business rules to proactively guide customers who might be in trouble. One of the important findings of CEB's research is that service organizations often waste effort making sure that the customer has 100% choice in picking channels and that every issue can be solved in every channel. The reality



# Proactively guide customers who are in trouble.

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is that service issues are sometimes best suited for resolution on specific channels. Wisely use your full arsenal of channels to actively guide the customer to the channel best suited for resolution. If you notice that your customer has clicked three times on different billing FAQs, suggesting a chat session may be the best option. However, if they are looking at an account upgrade page, pushing them a phone number may be the best option so as to not lose out on a revenue opportunity. If they are on their mobile phone, allow them to live chat or text with an agent from within the app they happen to be in. Take it one step further by giving your customers an SOS button right in your mobile app to instantly video chat with an agent that can also provide on-screen guidance. –





Chapter

# 04 Next Issue Avoidance

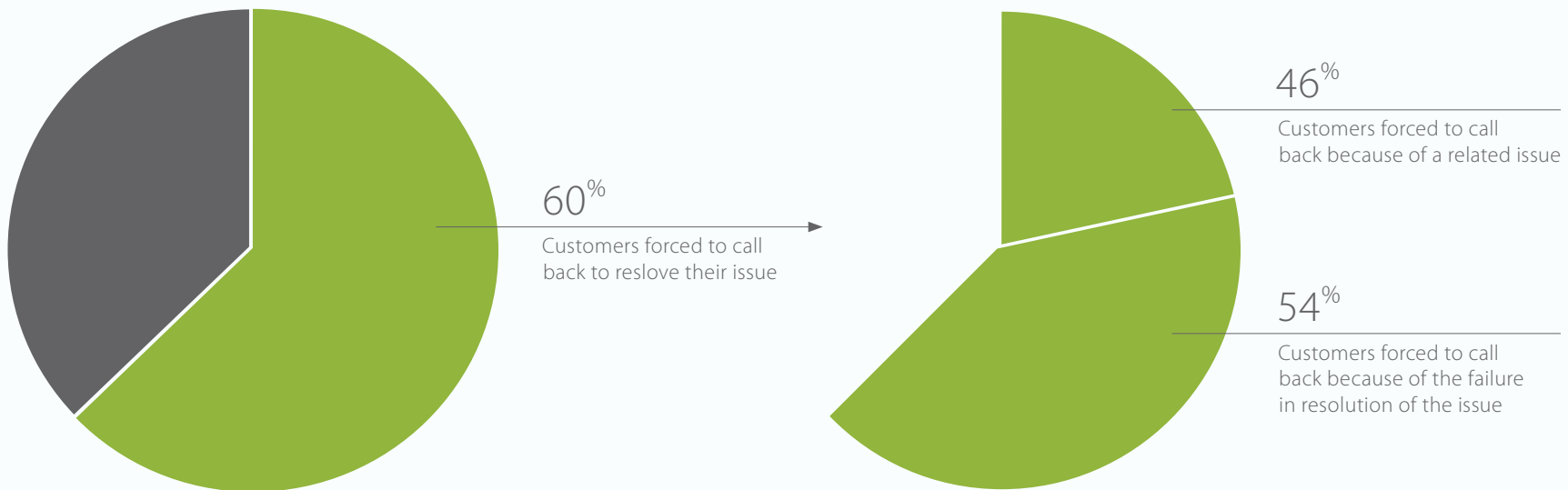
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Ward off a potential call back by a customer

# Next Issue Avoidance

The concept of Next Issue Avoidance is to proactively ward off a potential call back by a customer when you already have them engaged on the phone or some other channel. According to CEB, 60% of customers are forced to call back to resolve their issue. 54% of the time this is because of a failure in resolution of the issue, while 46% of the time it is because of a related issue. Each time a customer is forced to call back, it creates new effort for them and increases the potential for disloyalty.

## Customer Call Backs



Source: CEB

# So how do you practice Next Issue Avoidance?

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## Understand Issues and their Root Causes

Your frontline agents are your best resource to understand why customers call back. While surveys are important, capturing the agent's feedback right after the call while the information is fresh can be even more valuable. This information helps managers and executives understand why certain issues may take multiple steps to resolve and what the triggers are for a possible next call. For example, analytics on top of this data might show that customers who called for help with installing a new product, called back with pricing questions. If the customer calls back for the same issue, leverage reports to understand what solutions were suggested by the agent and if these solutions need to be reviewed by the right expert within your company for completeness and accuracy.

## Collaboration

Often the reason for a customer having to call back is because the frontline agent did not have the information or experience to properly resolve the issue. By providing the agent with real-time collaboration capabilities built into their console interface and even suggesting which experts they should contact for that issue, agents can easily source the right answer while the customer is still on the phone, and prevent a call back.

## Flexibility and Connectedness

Customer service is a changing world. As your customers evolve, so will the products and services you sell them. Your service organization must evolve as well in order to solve new issues while connecting with customers over new technologies and in new ways. Many service solutions are rigid and force their business workflows and data model onto your organization, which makes change a difficult and expensive process. Flexibility is paramount to the success of a service organization so that you can equip your agents with the right information and have the right processes in place to solve new challenges as they emerge. Cloud technologies provide companies with the flexibility to configure and customize the solution as quickly as their business needs change while still delivering automatic and hassle-free upgrades. The best solutions provide a platform upon which these processes can be easily created, automated, and integrated with your back-end legacy systems. —



Chapter

# 05 Experience Engineering

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Creating a positive perception of effort

# Experience Engineering

CEB's research has shown that a customer's perception of effort is just as—if not more—important than the actual effort they put in. Furthermore, the perception of effort has a high correlation with how the service agent speaks to them; that is the tone and words agents use with the customer. Creating a positive perception of effort is further complicated in situations when the agent had to deal with a frustrated customer or tell a customer they can't have what they want. CEB's research has found that mere pleasantries and politeness is not enough to positively impact customer effort.

The top three ways to promote better experience perceptions are:

- The customer perceiving the agent as being on their side
- The agent using positive language and eliminating negative terminology
- The agent rather than saying an outright "no," should present the customer with alternative options specific to their case

While many of these techniques rely on agent training and coaching, your customer service system still has a vital role to play in enabling and empowering agents to deliver the best experience possible.



## Personalization

Customers want to feel like they are more than a number in a database. CEB has identified robotic service as one of the leading causes for a negative perception of service. The trick for service organizations is providing personalized service at scale. It all starts with a rich single view of customer information that is an accumulation of their historic, demographic and even psychographic data such as their behavior and lifestyle. But this information can't be limited to traditional channels such as the phone, email and the web. Customers today are social and mobile and they expect your organization to connect with them in that way. With tie-ins to a customer's social activity if they have opted in, your agents could even be up to date on their latest tweets or other relevant social activity. With an integrated platform for service, all customer interactions regardless of channel or device are maintained in one place and attached to the customer's issue so they never have to repeat themselves. But understanding the customer shouldn't stop at just service. The customer expects you to know the marketing offers they may have signed up for, the products they've purchased, even a conversation they may have had in-store. With a flexible and integrated platform across sales, service, and marketing, you can build a truly singular and global view of the customer so that agents can provide every customer with personalized service.

## Scripting

Every time a customer has a bad experience it contributes to their negative perception of your company and fosters disloyalty. It's not enough to just provide great service once; you have to do it over and over again. Scripting builds consistency so that agents are proactively being coached by the system on how to handle a difficult situation or what to say when a customer asks a tough question. But scripting can't be static or it becomes ineffective and robotic. Today's technologies give agents a deeper understanding of the customer than ever before including environmental information such as the customer's location if they are calling from their mobile phone. With sophisticated business rules that account for everything from a customer's device, channel, issue, and even their mood, agents can should be dynamically pushed cues on how to build positivity with the customer right within their case management interface. This helps all agents, not just the experienced ones, handle every customer interaction with the right balance of empathy and professionalism that customers expect.

## Whisper Coaching

Many advanced service solutions offer whisper coaching so that managers can listen in on phone calls or online chats to help newer agents say the

right things in difficult situations. This technique is easier to implement in chat and has been one of the many drivers for the popularity of chat as a channel. An integrated service platform with a strong chat solution should allow for whisper coaching to be integrated into the agent interface. Whisper coaching not only helps improve everyday experiences, it adds another level of control to mitigate against poor experiences.

## Agent Performance

So much of your ability to engineer the customer's experience to be effortless is dependent on the performance of your agents. Developing and retaining high quality agents is top of mind for many service managers. While much of this activity is offline, there are many online capabilities that can help maximize agent performance while continuously identifying additional areas for development. Performance management solutions especially when baked right into your service solution as a seamless platform gives managers the tools they need to motivate and reward agents for delivering positive experiences and minimizing customer effort. Additionally, tie agent rewards directly to customer feedback surveys and reward agents with offline prizes like cash bonuses or even an end of year top performers trip. —





Chapter

# 06 Frontline Control

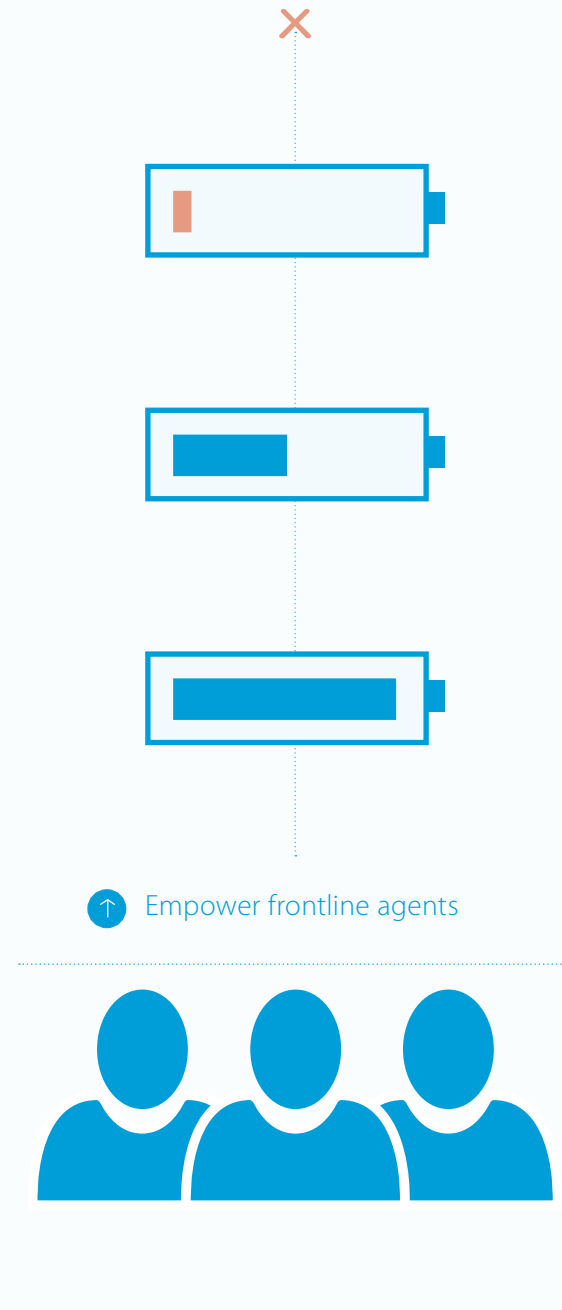
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Empower the frontline agents to use discretion

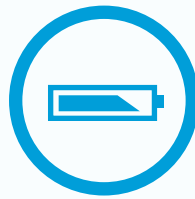
# Frontline Control

In its extensive research, CEB found one of the biggest turnoffs for a customer was being told that the company "policy" does not allow for what the customer was asking for, or being told that "it's not part of the process."

Customers want to feel like they are being treated like humans and not as steps in a service assembly line. Smart service organizations empower the frontline agents to use discretion such as waiving a late charge for a loyal customer or discounting a service after repeated service interruptions. But rep empowerment isn't as simple as it sounds. Managers must still control costs, stay compliant with overall policy, and ensure service consistency.



So how do smart service organizations  
balance empowerment, compliance, and cost?



## Real-time Collaboration

Real-time collaboration built into the agent's console allows agents to get help when they're faced with tough decisions. If the customer is asking for a discount, rather than transferring the customer's call to another agent, they can get an answer instantly from their manager using in-context collaboration. It gives the agent confidence that they are not alone when facing a difficult situation that requires the use of discretion outside of policy.

## Checks and Balances

Checks and balances give managers peace of mind that agents don't go rogue and deviate too far from policy. While discretion is important, consistency is paramount to service a large customer base with a high level of quality. With easy to configure business rules, managers can ensure the right actions are taken at the right time. Service level agreements with response and milestone tracking ensure support processes are being adhered to, and customers are receiving prompt and consistent support. Entitlements ensure customers get the quality of service for which they are paying for. Alerts and approval workflows keep managers informed in real-time of agent activity so they can step in as needed.

## Happy Agents Equal Happy Customers

Companies that differentiate themselves by providing exceptional service and delivering on the promise of an effortless experience for customers have learned that happy agents equal happy customers. Customer service reps are just like anybody else: they want to be empowered to do their best, they want to be rewarded when they do so, and they want the tools necessary to make service delivery as effortless as possible. Integrated performance management capabilities can help align corporate and personal goals. Modern socially-oriented performance management solutions allow for on-the-spot rewards by peers and managers, everything from a kudos to a cash bonus. Reports can ensure reps that are struggling in certain areas receive the coaching and development they need. By providing reps with simple intuitive interfaces, a wealth of customer and product information at their fingertips, and the right coaching, motivation, and rewards, they can take pride in providing exceptional service and making the service experience effortless for customers.

## A Final Word on Service Analytics

We've covered many capabilities to help reduce customer effort. But it all starts with strong analytics. The first step in the journey to providing

effortless service is to measure how you're doing today through customer feedback surveys. Even better, get buy in for introducing a customer effort score and use that alongside other metrics like first call resolution to measure your organization's success.

It's not just customers you want to hear from. Your frontline reps have invaluable knowledge about the reasons for customer distress and the remedies taken by customers to resolve issues. Survey your agents and analyze the data to help better understand the customer journey.

Next, track what your most common issues are and how much effort it takes to resolve them. Understand which issues are solved in which channels and which ones are mostly commonly escalated causing customer grief. Use service analytics to identify how issues are related together to aid with Next Issue Avoidance.

Building an exceptional service organization that is able to deliver an effortless experience for your customer is a journey that requires strong analytics capabilities to help you formulate strategies, implement the right processes and coaching, and learn from mistakes. Having ubiquitous access through a cloud-based customer service platform that is connected to the rest of your customer data amplifies the utility and effectiveness of having strong service analytics capabilities. —

Chapter

# 07 Conclusion

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1

## Channel Stickiness

Ensure a customer's problem is solved

2

## Next Issue Avoidance

Ward off a potential call back by a customer

3

## Experience Engineering

Creating a positive perception of effort

4

## Frontline Control

Empower the frontline agents to use discretion

# Conclusion

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Today's customers more than anything want service to be effortless on their part. Extensive research of over 125,000 customers conducted by CEB has proven this to be true. CEB's analysis has yielded four pillars that are critical to providing effortless service.

## 1 Channel Stickiness

Ensure a customer's problem is solved

Help customers solve their issue in the channel of their choice the first time so that they don't have to contact you again typically on a different channel such as on the phone or in the store. In cases where escalation cannot be avoided, make sure all the context of the case is carried over so customers don't have to repeat themselves.

## 2 Next Issue Avoidance

Ward off a potential call back by a customer

Understand why customers typically call back and proactively provide them with the right information to prevent it. Understand how issues are related and ensure agents are armed with this information so they can finish resolving the problem the first time rather than racing to get the customer off the phone.

## 3 Experience Engineering

Creating a positive perception of effort

A customer's perception of the effort required to solve a problem is often different than reality and this perception is driven by the language the agent uses. Coach agents and give them the right tools to build positive effort perceptions through positive language and eliminating negative terminology. Motivate agents using performance management capabilities to provide positive experiences and reward them accordingly.

## 4 Frontline Control

Empower the frontline agents to use discretion

Empower agents to provide personalized service to customers so that customers don't feel like they are receiving robotic service. Give managers the peace of mind they need around compliance and cost through business rules, workflows, and alerts.

# SERVICE SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

Delivering amazing customer service is at the heart of what it means to be a Customer Company and connect with your customers in entirely new ways.



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THE CUSTOMER SUCCESS PLATFORM