THE SECRET TO GREAT CUSTOMER SERVICE IS YOUR PLATFORM
INTRODUCTION

CRAWL

WALK

RUN

CONCLUSION
Building a world-class service organization is a journey. No single system, application, or process can provide a quick fix. Creating a foundation for success requires several key competencies and capabilities that every company must master, such as having a strong vision and roadmap, tracking the right metrics, enforcing a strong governance model, and adapting quickly to your customers’ and company’s evolving needs. In this e-book, we will examine the various stages in this journey and illustrate how service organizations can transform themselves from doing basic blocking and tackling to providing a differentiated customer service experience that wins and retains customers -- all using a cloud-based, customer engagement platform.

We've created a path that service organizations can follow and divided it into three stages – Crawl, Walk, and Run. The capabilities outlined in each section are examples based on what we’ve observed in the market and not meant to serve as rigid guidelines. Thus, these stages are not dependant on one another--for example, a capability discussed in the Walk section might be so important to your business that you do it first. Only your business model, corporate priorities, and customer needs can dictate the right path for you.

Typically, the first step most organizations take is to outline a strategy, develop a roadmap of priorities, and then gain executive buy in, approval, and budget to implement. Acknowledging that the world is a dynamic
AUTOMATE CASE MANAGEMENT

The ability to accept new cases (or issues or tickets), assign them to the right agents, and shepherd them to successful resolution is the bread and butter for every service organization. Automating issue resolution becomes a necessary first step on top of which innovation can then be built. Some important aspects of case management that organizations should consider include:

**WORK FLOW**
What happens to a case from birth to death? Who should work on it? How is the case escalated and how does an escalated case get resolved? These are the types of questions service organizations must ask themselves and then encase into workflow so that there is consistency and reliability in how customer issues are addressed.

**INTERFACE**
What does the agent interface look like? Most organizations will start with the out-of-the-box interface that their software solution provides. Making sure that it is intuitive, web-based, and minimizes agent effort is critical to boosting agent productivity and controlling cost.

**CHANNELS**
Channels represent the communication methods over which cases are accepted; phone, email, the web, social media, live chat, and so on. However, manually creating a case every time an email or tweet is received doesn’t scale and is prone to error. Service organizations must automate case creation and in-channel response across all the channels over which their customers wish to communicate.

**SERVICE LEVEL AGREEMENTS (SLAS) AND ENTITLEMENTS**
Many organizations provide tiered levels of service. Tracking and enforcing service entitlements is key to ensuring that everyone gets the level of service they have paid for. Tracking service level agreements and case resolution milestones gives you the confidence that no case will slip through the cracks potentially hurting an important customer relationship, over which their customers wish to communicate.
For many companies, the most pressing issue is agent productivity and cost. For others, it might be supporting a new channel that customers are demanding, while for yet others, it might be boosting customer satisfaction scores to prevent attrition. Regardless of issue, many companies are forced to make a change in their people, systems, or processes when confronted with a crisis or problem that can no longer be ignored. However, with a cloud-based customer service platform, adjustments can often be made at a lower cost and shorter timeframe. For example, boosting self-service presence can often be a quick and easy win to lower case volume, free up agents to work on more critical issues, and lower the overall cost of support. Every service organization must assess their own most critical needs and invest in areas that will have the highest impact on the metrics they care about.

While there may be a tendency to believe that innovative technologies are complex and best implemented in a phased approach, this is simply not true. The right cloud-based platform should mask complexity from users and make deploying even sophisticated capabilities, as simple as switching them on. The need for innovation is constant. Support organizations should try to find quick wins and ROI along the way that they can use to lobby executive support and funding to implement their vision.
OPPORTUNITY TO INNOVATE: SERVICE COMMUNITIES

Service Communities have become the new way we find answers, from selecting a restaurant to purchasing a new product. Communities can help companies not just crowdsourced knowledge, but foster customer engagement and create champions who often generate referral revenue. For Communities to be effective, they must be accessible on any device and should have a strong tie-in to the back-end service infrastructure so that they can be managed as part of your support processes rather than a nice-to-have outside of it. Unanswered posts should, as appropriate, be turned into cases while useful social answers should be fed back into the corporate knowledge base. Communities take some of the burden of support off your agents allowing you to cost-effectively scale as your customer base grows.
INTRODUCTION

CRAWL

WALK

RUN

CONCLUSION
WALK
TUNE THE AGENT INTERFACE

The agent interface is one of the most crucial pieces of the puzzle. The effectiveness of the interface is closely tied to agent productivity, which has a direct impact on cost. Since no customer wants to be kept waiting on the phone, chat, or even email while the agent processes the request, it has a strong impact on customer satisfaction as well. The more empowered the agent, the better the quality of support. Once basic case management processes have been automated, many organizations look to optimize the agent interface. A simplified agent experience can hugely impact the success of the organization.

If agents are required to use more than one interface, this is a good opportunity to consolidate them as much as possible by integrating the information and capabilities of redundant interfaces into the new one. This is also a chance to learn from agents both directly and through observation to prioritize new customizations accordingly. Enhancements can be as simple as modifying which fields are shown and in what order, to integrating with external knowledge sources and displaying them next to the case as it opens in order to reduce search time.
KNOWLEDGE BASE

Knowledge is critical in helping agents find answers quickly and easily. Most organizations will have not one, but multiple knowledge bases. Some of these might be structured knowledge products designed for customer support, while others might be homegrown systems based on access databases, excel files, and PDFs. By consolidating these multiple sources into a single and flexible knowledge solution, support organizations can put answers at an agent’s fingertips. Answers should be easy to find through powerful natural language search and pre-filtered based on case information so that only relevant articles are presented to the agent. Knowledge articles should be easy to author or modify so that agents and experts can do so on the fly, and be social so that information can be captured through both internal collaboration and external communities. Finally, strong knowledge analytics ensure that your agent productivity and customer satisfaction goals are met.

INTEGRATE WITH BACK-END SYSTEMS

Integrating with back-end systems is often not a top priority. However, when a customer calls with an issue, they don’t think of their problem as front office and back office. In addition to product account information, agents might need to access billing, shipping, inventory, invoices, and all types of other information in order to resolve the issue. Integrating support processes and interfaces with the necessary back-end systems gives agents the end-to-end view they need in order to better service the customer. Providing UI integration is typically an easier first win, where information from multiple systems is presented to the agent side by side eliminating the need for agents to manage multiple logins and alt-tab between multiple interfaces. The next step is building transactional integrations so that the agent can access information from multiple systems in a single click, and with another click, commit a transaction across both front-office and back-office systems. The end result for the customer is fast, effortless service that resolves their inquiry the first time.

COLLABORATION

Nobody knows more about solving the customer’s problem than the frontline agent who does it everyday. Collaboration enables your tier 1 and novice agents to leverage the expertise of senior agents, while connecting senior agents with internal experts. Through collaboration, the right team can easily swarm a problem resulting in a faster resolution for the customer rather than waiting for the case to follow a traditional escalation path. Collaboration is also useful for helping agents jointly author knowledge articles, allowing agents and managers to share ideas and insights, or helping managers and executives review quarterly progress. Once collaboration is baked into the solution, it has manifold advantages in helping support organizations become more nimble and responsive.
OPPORTUNITY TO INNOVATE: MOBILE

Customers no longer live on their laptops and in email. They live on their mobile phones. They want fast and easy access to answers and information from anywhere, including within your mobile app rather than your website. Companies who invest in mobile service can differentiate themselves by engaging consumers over the devices they use most often. But repurposing desktop content and interfaces for a mobile device is rarely successful. Everything from checking a case status, accessing the knowledge base, or engaging in a community discussion needs to be built for mobile. If your customers use a mobile app, then service should be delivered to them inside of that app in order to minimize effort. Mastering the world of mobile service can give even small organizations with limited budget the ability to leapfrog the competition.
While employees think of customer interactions as divided between sales, service, marketing, and the back-office, customers rarely do. They want the support rep to have the context of the marketing offer they signed up for on your company’s Facebook page. They want a sales rep calling them to be aware of the three phone calls they logged to support in the last two days. They want offers customized to their past interactions with your company. In order to be truly customer centric, support interactions must be thought of as just components within larger cross-departmental processes. A flexible cloud platform is a great tool in helping organizations build and automate processes that span the front office or enterprise. Regardless of the types of technologies deployed, organizations must strive to break down department silos and make the experience seamless for customers.

**UP-SELL, CROSS-SELL**

Solving a customer’s problem in a manner that is fast and near-effortless for them creates goodwill. When an agent has the customer on the phone, or even over email or social media, there is an opportunity to present the customer with offers that might enhance the existing products and services the customer already owns. Many support organizations are training agents on how and when to engage a customer in a relevant cross-sell pitch. The agent interface can be customized to aid agents in what to pitch and how to pitch it. Everything from selling premium support, bundles and upgrades, or even new offerings, can increase revenue and help the support organization get the budget it needs to be effective.

**INTELLIGENT SERVICE**

The support model for most organizations is centered around the notion that a customer raises an issue and the service organization responds to it, hopefully in a prompt manner. But savvy support organizations are realizing that the happiest customer is one whose issue is resolved before he or she even knew it existed. Many organizations are using machine-to-machine (M2M) communication to take humans out of the loop and allow the faulty machine to open a case before the problem gets bigger. Other organizations are using advanced predictive analytic techniques based on a customer’s keystrokes or behavior within their mobile app to predict if a case is about to get created and escalated. The cost of a case goes up with time and with each escalation or call back from the customer. The faster the case gets resolved, the better for all parties, with the ultimate goal of solving issues with little to no disruption to the customer.
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Amazon, a company known for innovation, recently launched Mayday, its in-app customer service offering. Amazon Mayday is an always-available help button on Kindle Fire tablets and phones that lets users who want immediate help launch a one-way video conference right on the device with an available support agent. This innovative vision has inspired new technology allowing companies to embed an “SOS” button into their own mobile apps. Companies can now deliver immediate and personalized service to any customer by video chatting with them live and enabling an agent to view the customer’s screen, walking them through their issue on any mobile device. Additionally, agents can annotate or “draw” on customers’ screens to guide them to the right answer. This greatly reduces the effort required of the customer while significantly reducing the likelihood of an escalation. Amazon Mayday is a great example of a service organization pushing the borders of innovation to further differentiate itself in the marketplace.

OPPORTUNITY TO INNOVATE: IN-APP, 1:1 SERVICE

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Building a world-class service organization is a journey. Companies must first automate core processes, fix critical problems, and lay the foundation of a service platform on top of which they can innovate. With the right platform in place, they have an opportunity to add other core elements such as a single optimized agent console, integrated knowledge, SLA monitoring and entitlement enforcement, collaboration, and much more. Along the way, it is vital to find big wins such as self-service communities and mobile service that not only pleases customers, but also keeps the momentum going internally with executive buy-in and budget approvals. The most successful service organizations are leveraging today’s technology to deliver faster, smarter, and more personalized customer service experiences and are doing so with a customer engagement platform. With a strong vision, roadmap, and an open, flexible, cloud-based platform, any company can accelerate their journey to becoming a world-class customer service organization.
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