

# Enabling Your Service Reps to Deliver Tailored Service – without the Risk

A white paper co-authored by Salesforce and CEB

## Part 1

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Despite advances in self-service and multichannel support, the live phone channel is still a critical touchpoint for customer service organizations. This is especially true when other channels fail to resolve the issue or if the issue is relatively complex. In fact, there is an entire website devoted to uncovering the “code” to quickly reach a live service rep when a customer does make a call.

In live service, the frequently overlooked truth is that two kinds of phone interactions exist in the customer service world:

- The customer calls and talks to a scripted service rep.
- The customer calls and talks to an unscripted service rep.

Service leaders around the world will tell you that these two types of interactions are wholly different. In the first interaction above, the rep sounds robotic, transactional, and scripted. As consumers, we’ve talked to this type of rep before. Although professional and pleasant, the rep seems to list off the company’s policies and isn’t flexible enough to meet our needs. In comparison, an unscripted service rep sounds authentic, personable, and tailored to our specific need. We know how different this type of conversation feels; the rep who works together with us, advocates for us, and helps us find the best possible solution. So, what separates these two reps?

## The Difference: Rep Judgment

CEB, the leading member-based advisory company, finds that a crucial element of success is whether a rep uses their judgment to provide a tailored response to the customer: Reps who use judgment sound more like real human beings. Although being personable has always been important, rep judgment is more crucial now than ever before because of the changing environment and nature of customer service. As simple issues – such as “check my balance” or “place my order” – are increasingly handled in self-service channels, live calls have become more complex. Today, many issues in the live phone channel do not have clear-cut answers but rather multiple resolution paths with higher levels of variation. In addition, customers increasingly expect personalized service that aligns to their situation.

That shift means that reps must migrate from a world of efficiency and adherence to company policies and processes to a world of judgment where they are fully enabled to deliver the type of experience customers expect. Most service organizations are aware of this environmental shift, and they have taken steps to strengthen rep judgment and remove long-held, efficiency-focused policies and rules by:

- Discarding most agent scripts (outside of those required for regulatory or legal purposes)
- Setting broader average handle time (AHT) guardrails or eliminating it altogether on rep scorecards
- Empowering reps to do more to satisfy customers
- Shifting to nonchecklist quality assurance that focuses more on customer outcomes

When asked how these projects are progressing, most service leaders respond positively. In fact, 86% of service leaders believe their core-performing reps are successful at using their judgment to deliver the types of humanized experiences customers want.

Unfortunately, reps do not agree. Among the 7,687 frontline reps surveyed, only 35% of them said they felt enabled to exercise their judgment. Many say they feel that the company has not gone far enough to remove barriers, like productivity metrics or policies, that do not allow them to use their judgment.

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## Why Don't Service Leaders Enable Their Reps More?

The reason service leaders don't fully enable their reps can be summed up in one word: risk. Service leaders say they believe they will expose their companies to significant legal, regulatory, cost, and even customer experience risk if they enable greater rep judgment. Service leaders are torn: On one hand, more rep judgment leads to efficient delivery of the type of interactions customers expect; on the other hand, enabling more rep judgment doesn't seem possible in the current environment.

To tackle this challenge, we set out to answer the critical question, “How can we make it less risky for reps to exercise their judgment so they can take full ownership of customer issues?” In a survey of 7,687 frontline reps from a variety of B2C and B2B companies worldwide, reps indicated their level of desire to exercise personal judgment and the company's level of enablement of that judgment. We also tested reps' ability to exercise their judgment through situational judgment tests. Each rep survey attribute was tested against customer outcomes: customer effort, customer satisfaction, and productivity. This information was then coupled with ethnographic studies of several contact centers.

## Three Types of Service Organization Climates

The study revealed that three distinct service organization climates exist and that each service organization has a climate that fits into one of these three descriptions:

### Climate Versus Culture

Company culture, or the deeply held assumptions and beliefs of a company and its employees, is related to climate. Culture is often thought to be held at the company level, which is difficult to influence and takes a long time to change; climate is at a lower altitude and can vary by business unit or even supervisor. Climate is malleable and is more easily influenced than culture.

### Adherence Climate

An environment where reps agree that they:

- a) Look for ways to make calls shorter
- b) Believe they are messengers for the company's policies and procedures
- c) Are aware of being monitored or recorded

### Individual Judgment Climate

An environment where reps agree that they:

- a) Rely on their personal judgment to help customers
- b) Find success by repeating what they have done in the past
- c) Do what they have to do to please customers

### Network Judgment Climate

An environment where reps agree that they:

- a) Work in an environment where coworkers proactively ask each other for help and do not focus only on their own performance
- b) Vary their customer interactions to match each customer's needs
- c) Learn something new almost every day

The adherence climate is relatively familiar; it is the efficiency-focused climate many organizations try to move away from or avoid. Companies are attracted to the individual judgment climate but find it to be risky. Both adherence and individual judgment climates only have the potential of marginal gains over current performance, but the final climate – network judgment – far outperforms the rest. A network judgment climate is one in which each rep's experiences become everyone's experiences and where sharing and learning from each other improves everyone's performance. It enables increased rep judgment and reduces risk, all while improving customer effort and satisfaction without harming productivity.

## Why a Network Judgment Climate Wins

A network judgment climate improves customer outcomes, reduces risk, and increases employee engagement.

Customer Outcomes	+34% - 36%	Improves customer outcomes by 34%–36% as compared to individual judgment and adherence climates, respectively.
Less Risk	-25%	Decreases the risk of poor judgment by reps (as compared to the average company) by 25.5%; the individual judgment climate increases the risk of poor judgment by 11%.
Bonus	+54%	Increases rep engagement drivers, including a 54% increase in discretionary effort and a 17% increase in rep intent to stay.

In today's more complex world with so many potential customer service issues, reps find that their own experience will only take them so far. Learning from others – both best practices and what to avoid – is crucial to increase their learning curve and to avoid poor judgment decisions. This is more than collaboration; in fact, some of the most important advice a rep can give relates to when things don't go as planned on a call. If that rep feels encouraged, even expected, to share what went wrong and the lessons learned, then other reps can learn from that experience and won't make the same mistake themselves. Hundreds of poor judgment decisions can be limited to a single instance because everyone learns from it.

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## Shifting to a Network Judgment Climate

Unfortunately, our research found that only 9% of the companies surveyed had a network judgment climate present. While service leaders cannot force reps to network and learn from each other, leading companies do the following two things to make these behaviors much more likely.

### 1 Encourage reps to learn from each other and cultivate the rep network by:

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- a) Signaling the expectation of peer learning and sharing by redefining rep roles and creating team-based incentives
- b) Arming reps to have high-quality conversations so they learn not only the “what” but also the “why” – and so the information is globally applicable
- c) Bringing reps closer together, both physically and virtually, to make it easier to connect

### 2 Eliminate remaining barriers to rep judgment so that reps can fully use what they have learned from others by:

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- a) Reconditioning frontline supervisors to support, signal the importance of, and coach safe rep judgment
- b) Positioning frontline reps to identify and remove obstacles to rep judgment that are difficult to see from the leadership level

By making it expected and easy to network, companies can shift to a cohesive climate of network judgment and reap the rewards of better customer experiences, less company risk, and more engaged employees.

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## Part 2

Authored by Larry Robinson, SVP of Service Cloud Product Management, Salesforce

To implement a network judgment climate, companies can borrow from the Agile-with-Scrum software development practice of collocating teams and team leads to achieve greater cross-functional collaboration. These teams would use the concept of the daily standup, a 15-minute morning meeting, to review the past day, including lessons learned,

examples of good and bad customer experience, and difficult problems solved. Each member of the team would suggest one or two things they will do better in the coming day. This discipline of sharing best practices offers a powerful learning and team building opportunity.

Team leads would document lessons learned and highlight processes that are frustrating to both reps and customers. They would run a monthly review with management to propose improvements of systems, processes, and policies to reduce customer effort, improve the level of service, and empower reps to exercise judgment. For this process to be effective, management must take the feedback seriously and resolve the top issues discovered through this forum. This level of inclusion and empowerment will motivate all reps to own the systems and processes required to deliver a low-effort customer experience.

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## Four Ways Technology Can Help Create a Network Judgment Climate

### 1. Create Full Customer Context

It is impossible to empower reps to serve customers and exercise judgment if they do not have all of the customer's information at their fingertips. Reps are at a disadvantage when they don't know:

- What the customer has purchased
- Which services the customer has
- How the customer last contacted the company
- What the customer's social influence is
- What issues the customer experienced in the past

When reps have no idea if a customer is frustrated because of repeat contacts or issues, they are forced to be reactive. There is no way they can deliver great service without insight and empathy. Service organizations must focus on providing the right information at the right moment. By making it easy for reps to gain context in the seconds between a screen pop and greeting the customer, service organizations can better equip reps for a successful service interaction.

Many companies deploy an agent desktop designed and configured to consolidate the best information about the customer – in context – that reps need in order to take control of the conversation right from the start. This enables reps to exercise judgment in the context of customer value, the problems the customer has already experienced, and the level of frustration the customer may feel.

This is where providing a 360-degree view of the customer comes in. This concept means something different for each organization, but the goal is to have a full lifecycle view of every interaction (regardless of channel), every product or service, every service contract and warranty, and all marketing offers or sales activities in progress. The 360-degree view means fully providing the relevant business and interaction context around each and every customer and exposing this context immediately to the rep. The less the customer needs to explain, the better. The more appropriate the context the rep already has, the lower the customer effort. The rep experiences a better interaction with the customer, thereby further encouraging the exercise of judgment and further reducing customer effort. This virtuous cycle is the goal of every conversation with customers.

## 2. Remove Technology and System Barriers to Performance

Many customer service systems are too old and difficult to use, and there are often too many systems that reps need to access to do their job. By shifting focus from learning systems to learning communications and empathy skills, companies can empower reps to exercise judgment. In many high-volume B2C service companies in financial services, telecomm, and high-tech industries, it is not uncommon to hear that reps must access more than 20 systems to do their work. Clearly, not every interaction requires that many systems, but over the course of servicing every type of customer need, a rep would be required to know and use all of these systems. The overwhelming burden of technology significantly hinders reps' ability to develop the communications and interaction management skills demanded by today's consumer.

The best companies are not only looking for ways to reduce this burden and modernize the systems reps need to access – they're also working to expose all of these systems as a set of web services that can integrate into a universal agent desktop.

At Salesforce, this is one of the highest-priority initiatives: to deliver a universal agent desktop framework that allows companies to create what some call "a single pane of glass." This single pane of glass brings together all customer interaction data and presents the required back-office systems to handle the interaction. A number of companies are using Salesforce to build this single pane of glass for their reps because they realize that to be effective, reps need technology to enable rather than impede. For example:

A satellite TV provider may receive a customer service call to modify the customer's service. As soon as the screen pops to the customer information, the rep has all of the customer's contact information, current subscription information, payment status (current or in default), lifetime value, and the provisioning system to change the customer's service. As soon as the call begins, the rep knows if it is a high-value customer and anticipates the customer wanting to make a change in service. When the customer asks to add the NFL sports package, the rep can immediately do so because that system is already in focus on the agent desktop. At the same time, a marketing upsell/cross-sell component suggests to the rep that if the customer were to change to the next level of service for just a few dollars more each month, they can get a more complete sports package and a movie channel at the same time. The Salesforce single-pane-of-glass system has used predictive analytics to suggest this offer, and there is a high likelihood that the customer will accept it. A service call turns into an upsell opportunity.

## 3. Deploy Real-Time Collaboration Systems

Adding to the benefit of collocating teams to sit together, many companies deploy collaboration frameworks to encourage teamwork in solving customer issues. Salesforce Chatter allows for direct collaboration around any and all records within the CRM system, including the customer record, orders, and customer service requests. Chatter also allows collaboration in groups, around files and knowledge articles, and directly on reps' profiles (much like a Facebook profile).

These systems work to close the gap when it's not possible to collocate teams into the same physical space, and they act as a running record of the dialogue and networking on a daily basis. This record can be used in daily standup meetings or at monthly reviews to further illustrate problems and opportunities for improvements in the customer service processes.

Facebook has recently begun to offer corporate spaces that follow the Facebook model but are private within a company and allow reps to safely and privately collaborate across the organization and within their teams. Real-time collaboration vendors, such as Atlassian (Hipchat) and Slack, enable real-time chat room collaboration between team members. These systems let a rep reach out during a difficult customer service call and get real-time advice from other reps and team leads; for example, they can seek real-time approval to offer retention incentives to key customers who seek to cancel service.

#### 4. Practice Transparency and Use Collaborative Feedback

To encourage network judgment and encourage collaboration, companies provide systems of transparent feedback through dashboards or scorecards and reports showing personal and team performance. These dashboards feature key metrics that matter, such as customer survey results by team, effort scores reported by customers, and customer satisfaction in general. The metrics an organization measures and publicly displays require careful thought to avoid including any metrics that drive the wrong behavior. Reps can collaborate to determine which metrics are best for the organization and which ones harm performance, motivation, and the ability to provide a lower-effort customer experience. An element of gamification can be introduced through these scorecards, and showing performance against metrics for each team allows teams to engage in some friendly competition. Sharing a rep's performance against other team members allows stronger team members to help weaker members and raises the overall success of the team. Rewards and recognition for top teams, coupled with having those teams share their best practices, can raise the performance of the whole organization.

Systems of transparency foster positive and constructive coaching of weaker team members by their managers and help ground these coaching sessions in objective data rather than subjective opinion. Taking the concept of gamification further, companies such as Bunchball or Badgeville provide motivation via social recognition; you can award badges for meeting key performance and collaboration objectives, and reps can award badges to each other, providing feedback and publicly thanking those who have helped them.

CA Technologies chose Badgeville to power a gamification and loyalty program that enabled them to identify, measure, and reward valuable collaborative behaviors, surface experts, and increase community member adoption and value. Using real-time feedback and championed expertise, their CA Champions program continues to drive engagement. They achieved 57% more questions answered and a 32% increase in idea submission.

The key to success is transparency. The more transparent the system and measures are, the more reps will engage and be motivated. Coaching conversations – and even performance management – become fact based and objective.

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## Conclusion

By providing reps full customer context, removing internal barriers, deploying real-time collaboration systems, and practicing transparency in feedback loops, service organizations can shift to a climate of network judgment and realize returns for customers, employees, and the entire company. Customers will feel they are dealing with live human beings and will have more successful and productive conversations. Reps will deliver the personalized and effortless experience customers expect, reduce costly escalations and callbacks for the company, and provide an engaging environment – truly a win-win-win proposition.