How to Make Customer Service Conversations More Intelligent

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THE AGE OF THE CUSTOMER – YOUR CUSTOMERS WANT SERVICE ON THEIR TERMS

This is a critical time in customer service as leaders reimagine the service department's role in the business. They're taking it from a cost center to a strategic growth engine. Today, the Service department needs to be responsible for delivering service that not only solves a problem, but delivers an intelligent, 1:1 conversational service experience that encourages customers to choose your company over the competition. In fact, customer experience has overtaken price and product as the key brand differentiator according to the Customers 2020 report.

In the 1960's, customer service reps solved problems exclusively by phone. Since then, agents have made themselves more available to customers, fielding requests by email, social media, and through apps. Now the next-generation of customer service is messaging. Every day, individuals around the world send 80 billion messages to their friends and family. This kind of instant communication has permeated the service department – customers are demanding the same level of instant conversation and intelligent service from your service team. Think about the last time you messaged a friend – you can scroll back and see the history of the conversation, with full context. When service departments leverage conversational messaging, they can use that contextual history to deliver service that is more intelligent and personalized.

And when customer service is done right, the business benefits[1]:

Save 22% in service costs

Solve cases 31% faster

Increase agent productivity by 28%

Increase customer satisfaction by 35%

[1]According to the Salesforce Customer Relationship Survey

THE TOP SERVICE CHALLENGES

But when it comes to customer service, there's a clear conversation gap. Initially, service communication was established as something purely transactional – customers place a call, you create a case, solve the problem, and close the case. But this transactional nature of conversation isn't satisfying customers anymore. Customers want conversations that are smart, instant, and highly relevant, without sounding like the agent is reading off a script. Looking towards the future of customer engagement, intelligent conversational service is the new battleground and the one way that companies will win new customers.

People love messaging and texting because it's so innately conversational. And guess what? Customers want to have these same simple conversations with companies – whether it's over the phone, via text, on a messaging app, or through social media.

So what's stopping companies from delivering these kind of conversations to customers?

○ Companies have tons of customer data, but can't leverage that data to keep up with the customer's expectations for instant and personalized service on every channel.

○ Agents and managers are bogged down with tedious tasks that could be automated, leading to long case resolution times and high employee turnover.

○ On-premise and inflexible technology means service organizations aren't connecting with customers the way the customer wants.

○ Artificial intelligence is permeating business, but customer service teams don't know how to make the most of this new technology.

"According to the State of Service Research Report, only 19% of service professionals rate their ability to keep up with customers' changing expectations as 'excellent.'"

THE FOUR PILLARS OF EXCEPTIONAL CUSTOMER SERVICE EXPERIENCES

Surveys show that 69% of customers believe their customer service experience improves when agents **don't sound like they're reading a script**. Relying on conversational service instead of scripts for building the customer experience can differentiate one business and elevate it above the competition.

Here's what you need to do to transform customer service at your company:

⊘ Offer customers personalized service at every step

⊘ Empower your agents to solve customer issues fast

⊘ Predict customer's needs with Intelligence and AI

⊘ Connect your service agents to the rest of your business so everyone has a complete view of the customer

In this e-book, we will identify how to address these FOUR key areas to deliver personalized experiences, and what steps to take to differentiate your business with the conversational service that customers are seeking.

"High-performing service teams are **1.7x more likely** than underperforming teams to provide agents with decision-making power to provide personalized solutions for customers."

– State of Service Report

STEP 1

Engage Your Customers

When customers engage with your service team, they expect the experience to be instantaneous and personalized to them. Customers want conversations that are as fast and relevant as the last text message they exchanged with a friend. But companies aren't keeping up with these expectations. So customers are cutting ties and going with companies that will deliver.

It may seem like a tall order to deliver the service that customers are asking for, but in today's business landscape, it's absolutely imperative. To put it frankly: businesses think they are much better at service than they actually are. Approximately 80% of companies say they deliver a "superior" customer service experience, but only 8% of customers think these companies actually provide it (Shankman Honig Consultants).

It's no big secret why this disconnect is occurring – consumer behavior changes quickly, and businesses have been slow to adapt. Consumers have been using Facebook in their everyday lives since 2004. But many companies have yet to fully integrate social media into their customer service. Resolving customer complaints via Twitter or Facebook seems like a nice-to-have when it should be a must-have.

In reality, delivering service that meets your customer's expectations is easier than you think, and comes down to three primary cornerstones.

"Salesforce for Service increases customer retention by 26%, according to the Salesforce Customer Relationship Survey of over 10,500 customers."
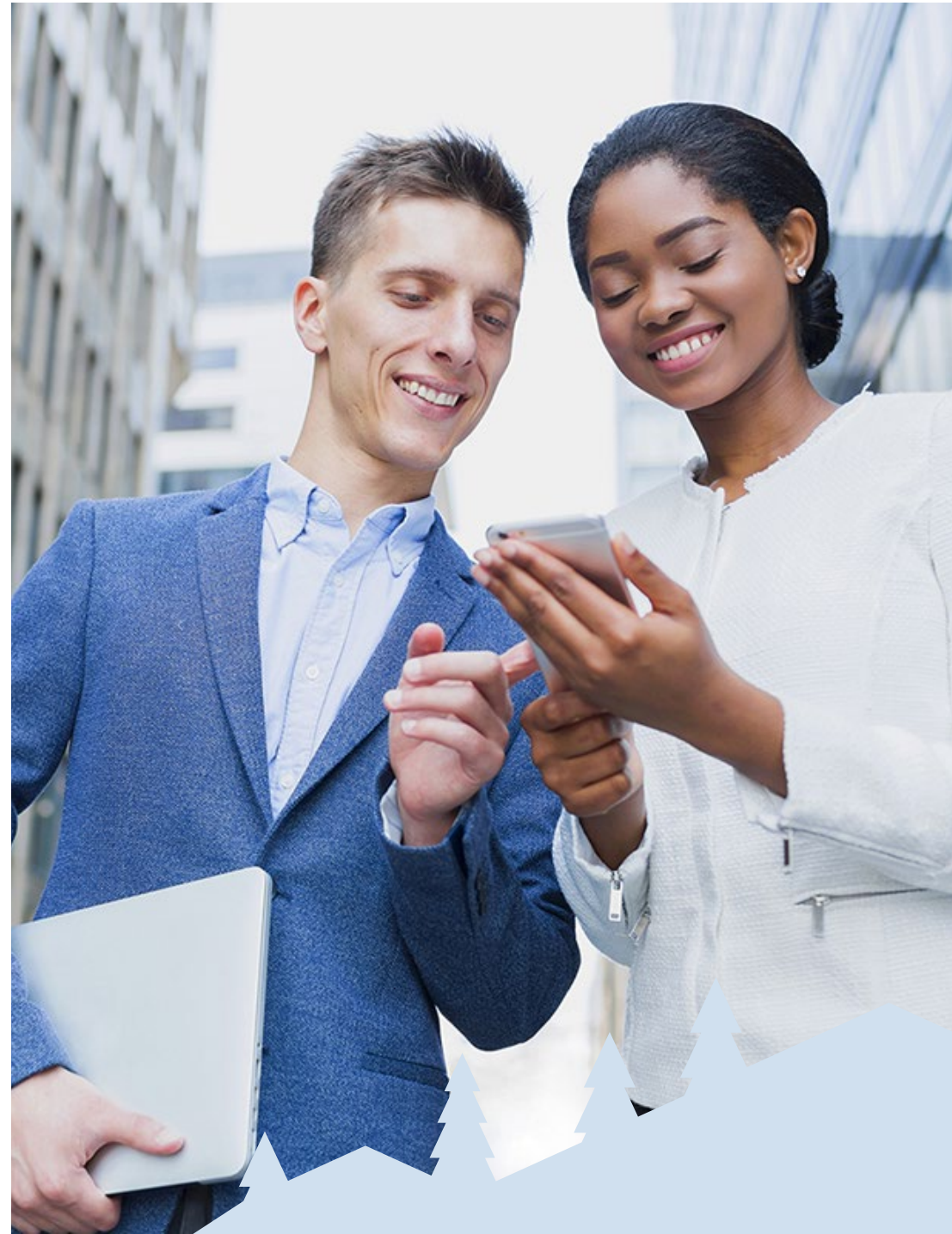
## DELIVER PERSONALIZED SERVICE ON EVERY CHANNEL

Your customers have a litany of channels at their fingertips – both traditional, such as 1-800 numbers, and modern, such as social media channels. Service must extend to these modern channels, considering customers spend nearly all of their mobile lives engaging on social media and sending text or app-based messages. In fact, it's imperative that service agents meet customers where they are. According to the State of the Connected Customer Report, 65% of consumers say they're more likely to switch brands if a company customer engagement is fragmented across channels.

Connected, omni-channel engagement across traditional and modern channels is necessary to be a high-performing service team. The tools for these high-performing teams include contextual video chat with on-screen annotation so you can assist customers within their mobile apps, and instant, one-to-one chat on any device.
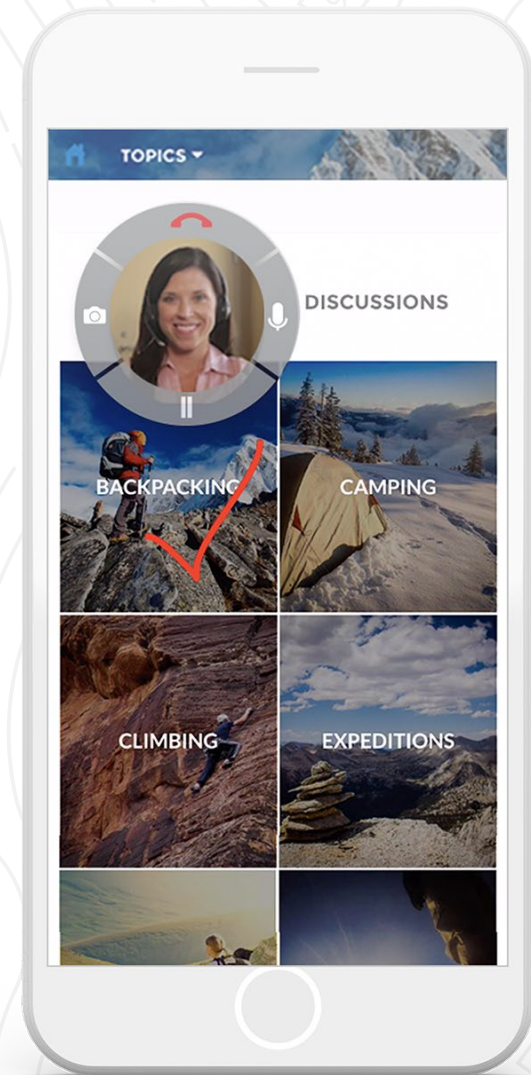
## MAKE SERVICE MORE CONVENIENT WITH CONVERSATIONAL MESSAGING

According to Harris Poll, 64% of consumers prefer texting over phone calls for service, yet companies are not servicing customers on this channel. What companies need to close that gap is technology that will let them connect to customers on every channel, especially over messaging channels. But there is a way to embed connected service in every part of the customer experience. With LiveMessage, you can deliver messaging support on SMS, and the agility of Salesforce means you can tackle whatever messaging apps the future holds.
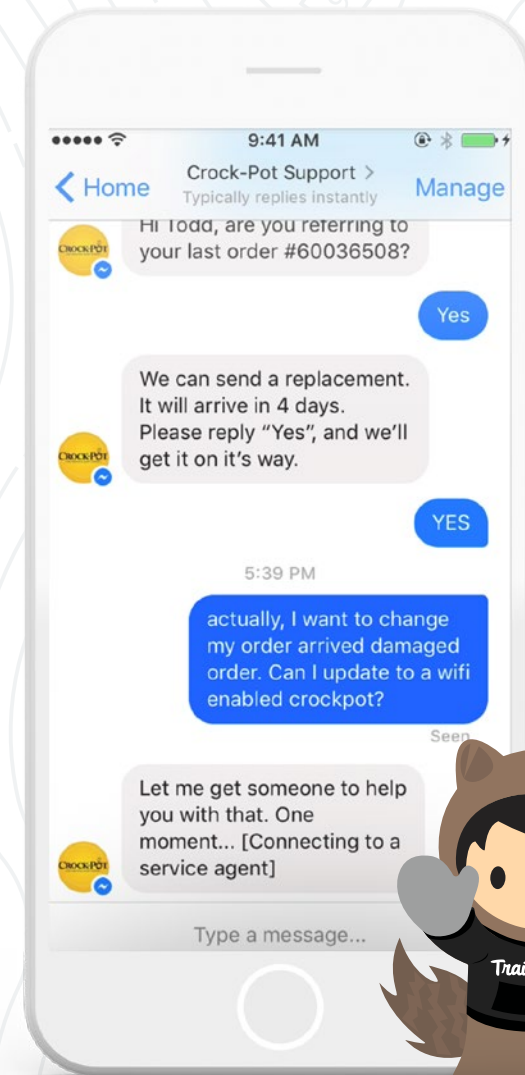
HELP CUSTOMERS HELP THEMSELVES

Customers don't want to solely rely on agents to solve their problems–they want to come up with solutions themselves. A self-service community is a hub of portals and discussion forums that gives customers the opportunity to help themselves – and each other – find the answers they want quickly, whether they're on a desktop or mobile device. No question goes unanswered, because any question posed to the community that is not solved by community members is automatically routed to an expert service agent to tackle the case.

Self-service communities are a win-win: customers get the answer they need fast without having to sit on hold waiting for a customer service agent, and agents are free to tackle the much trickier cases. Start taking advantage of the huge benefits of self-service as quickly as possible; it's easy to deploy and manage the community experience with out-of-the box templates that enable you to create the community with clicks, not code.
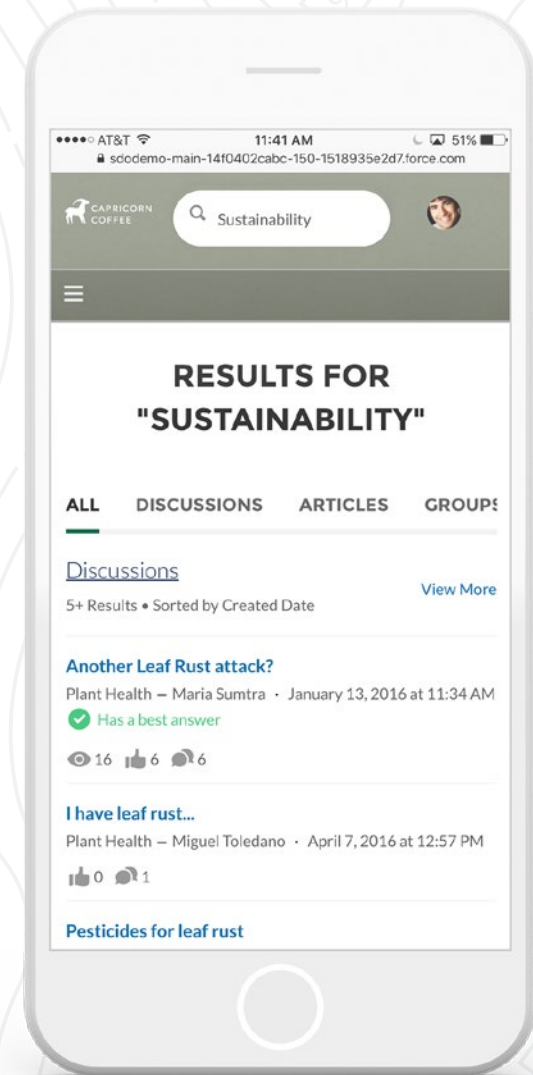
STEP 2

Empower Agents and Their Managers

When agents aren't empowered and enabled to take every step necessary to create an amazing customer experience, two things happen: First, cases aren't resolved fast enough and second, frustrated agents quit.

It's a pretty simple formula:

empowered agents

=

happy agents

} Happy agents empowered to provide the best possible experience

= 🙂 happy customers

So what's the easiest and quickest way to empower your agents? Setting them up with a complete agent and manager experience, whether they're sitting at their desk or out in the field. This will give them the productivity tools, actionable insights, and predictive service capabilities they need to resolve cases fast.

"Salesforce for Service increases agent productivity by 28%, according to the Salesforce Customer Relationship Survey."

CLOSE CASES FASTER WITH INTELLIGENT PRODUCTIVITY TOOLS

Knowledge, subject matter experts, and customer profiles are all at the agent's fingertips and the console serves intelligent recommendations so the agent can deliver better service. Additionally, productivity relies on ease of use. The dynamic, responsive layout of the console in the agent desktop experience makes it easy for agents to put the information that they need front-and-center, whether it's routing cases, managing SLAs and entitlements, or providing phone and CTI support.

"High-performing service teams are **4.1x more likely** than underperforming teams to strongly agree that their agents have the tools and technology to effectively and quickly utilize customer and product information to solve customer issue."

– **State of Service Report**

EMPOWER SERVICE MANAGERS WITH INSIGHTS AT THEIR FINGERTIPS

High-performing customer service teams drive efficiency and optimize digital channels with the power of analytics. Previously, analytics was relegated to a team of data scientists – who often pulled reports on a monthly basis. How are teams supposed to make informed, data-driven decisions when the analytics they're working with are a month old?

With Service Wave Analytics, you can embed data within the agent console so your service agents can make more informed decisions. Additional, service managers can see critical KPIs, such as CSAT scores, average handle time, and first call resolution in one place, for optimum coaching opportunities.
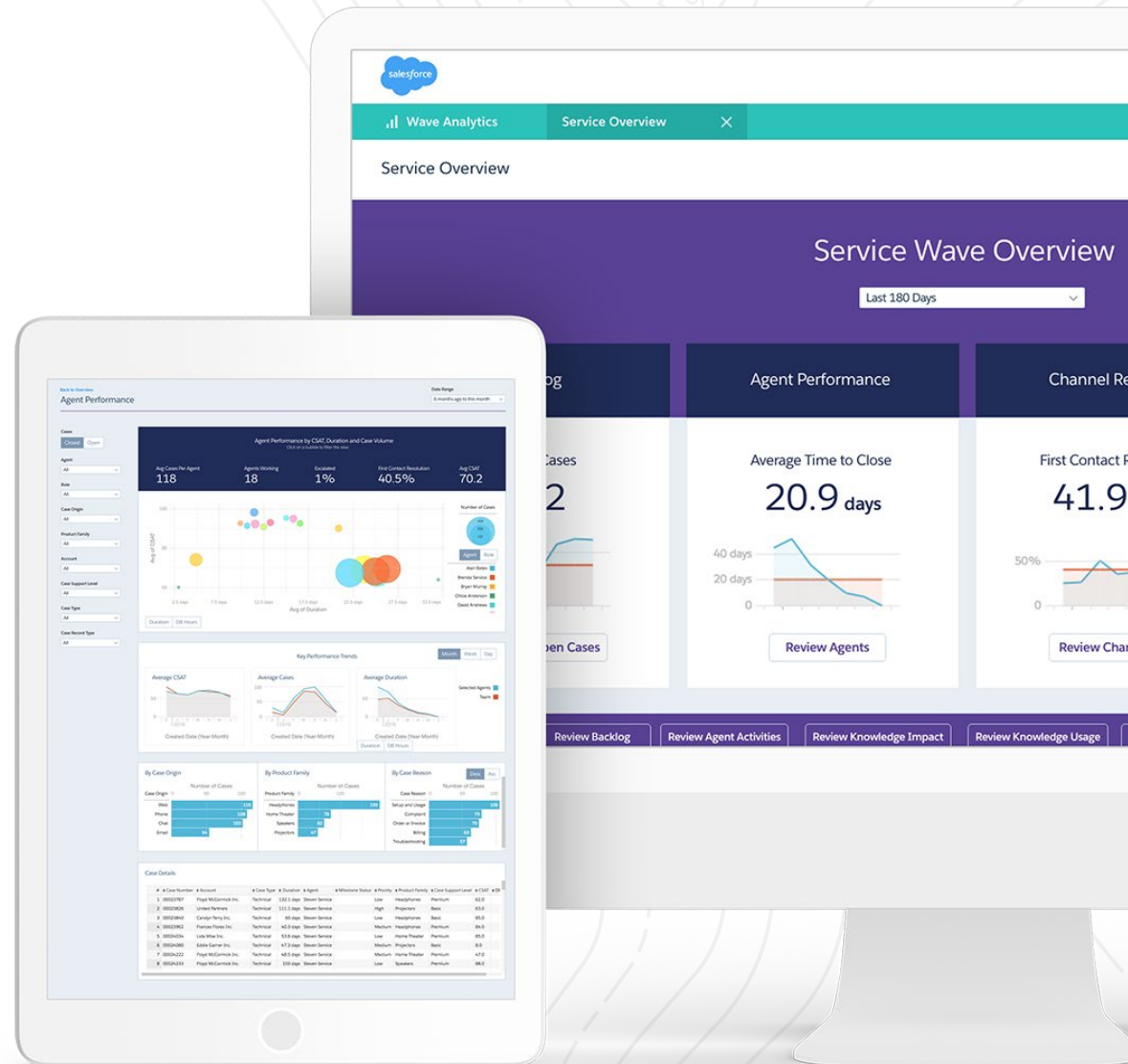
TRANSFORM ON-SITE SERVICE FOR YOUR MOBILE WORKFORCE

Your employees who directly interact with customers the most are field service technicians. But as soon as these employees hop into their truck to attend an in-person service call, they are immediately disconnected from the 360-degree customer view they need to deliver a personalized experience and get the problem fixed the first time. With Field Service, mobile employees have access to work orders and all the key information they need while on the go. With the Field Service Mobile App, field service techs can even connect to experts and reports from anywhere, and access information offline. The Field Service Lightning mobile app brings the full power of on-site management to the mobile workforce.

"Between 2015 and 2016, service teams have increased their use of field service/work order management technology by 67%."

– State of Service Report
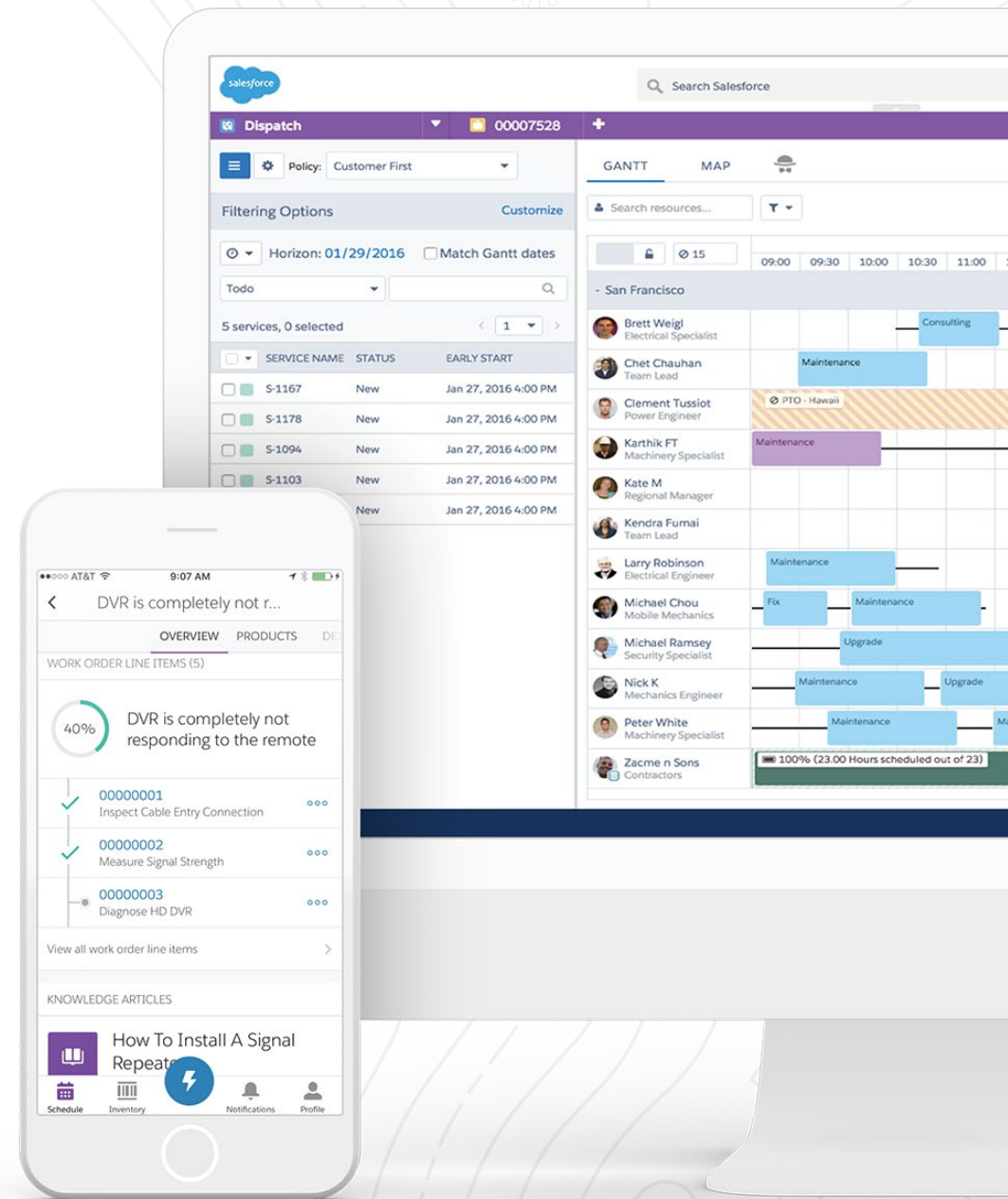
STEP 3

Use Intelligence to Make Agents Smarter and Customers Happier

Think back to some of the best customer service experiences you've had. Odds are the ones that stood out did so because the company made the experience super easy for you, or you spoke with an agent that seemed to have ESP – they knew who you were, your history with the company, and solved your problem fast. The challenge for today's contact centers is: How do you solve for efficiency AND deliver a memorable customer experience for every customer.

With Salesforce for Service, companies arm their agents and team members with AI and intelligence, to help deliver smarter customer service – which makes customers happier! AI and Intelligence is really the future – and with Service Cloud Einstein, contact centers can tap into this powerful technology and unlock deep customer insights. Meaning that every employee, from the contact center agent, to the service manager, to the mobile field service agent, has a powerful tool that makes them smarter and more effective.
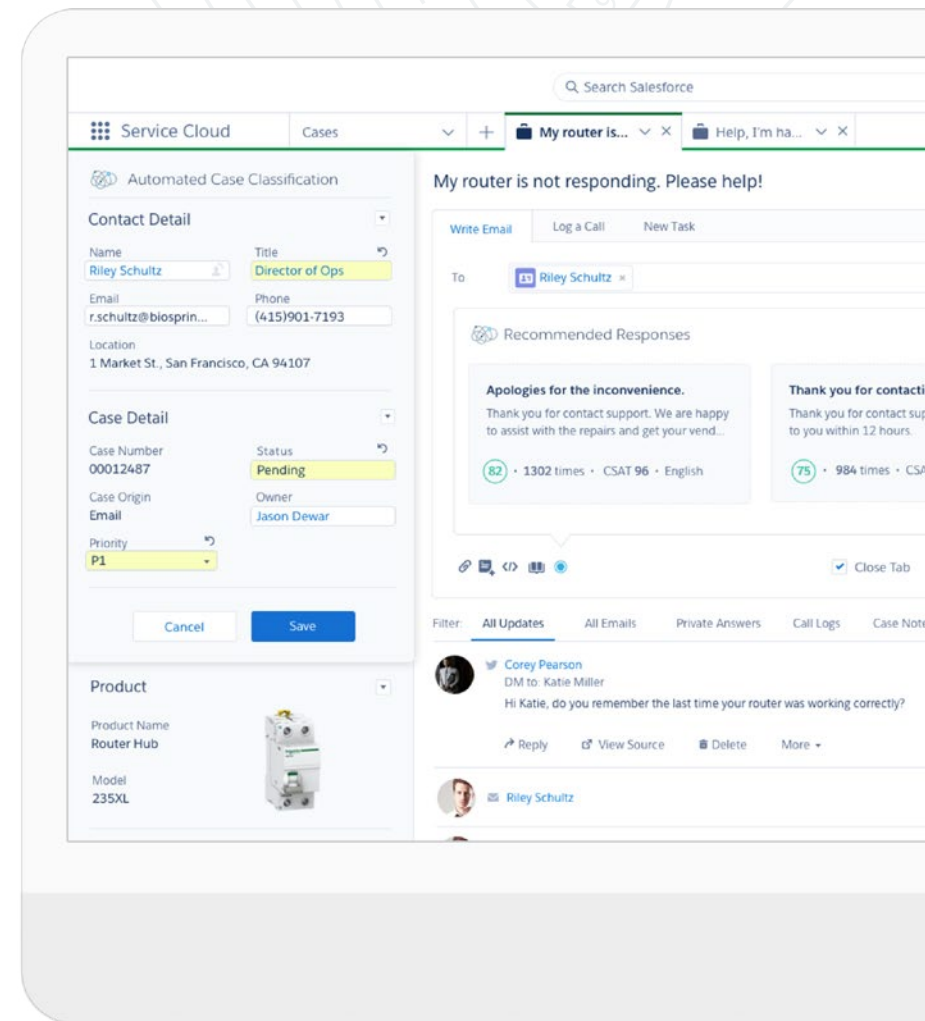
MAKE AGENTS SMARTER WITH AI-POWERED INSIGHTS AND PREDICTIONS

With Einstein Case Classification, every agent is your smartest, fastest agent. As a case comes in, it is automatically escalated and classified using machine learning. In addition, relevant information required to resolve cases, such as knowledge articles or videos, are automatically surfaced, saving agents valuable time and creating improved customer experiences. Using Einstein Case Classification, high-priority cases are routed to the next available agent.

Einstein Data Discovery enables supervisors and agents to automatically discover and explain insights from millions of data combinations in a matter of minutes. It generates natural-language answers, explanations, and recommendations in a way that is easy to understand. Einstein Data Discovery can even predict customer satisfaction and make specific recommendations to the supervisor and agent to improve the customer experience.
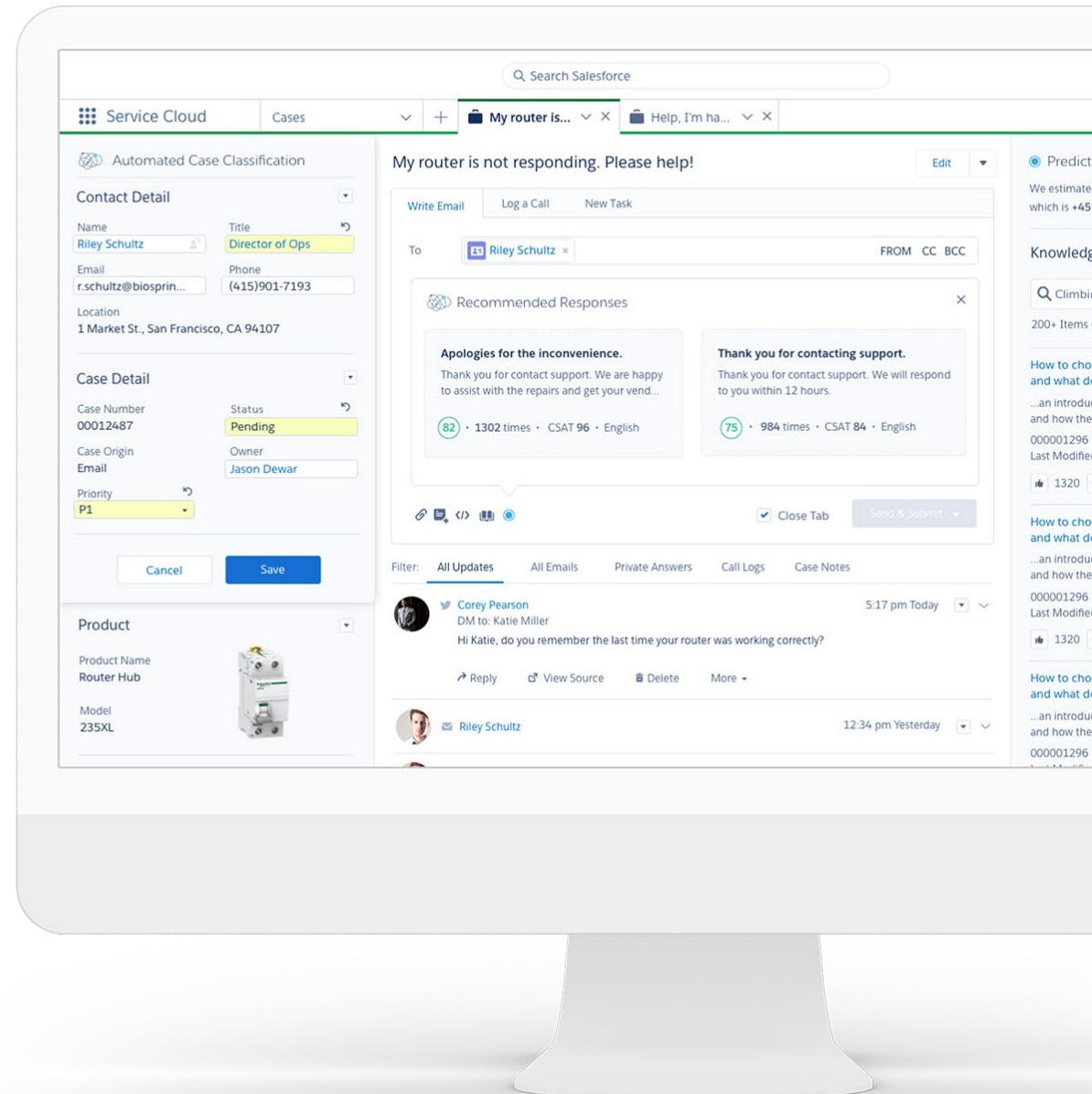
MAKE CUSTOMERS HAPPIER WITH INTELLIGENT RECOMMENDATIONS

Artificial intelligence doesn't just help your agents work smarter and faster, it enables your customers to make the most of the self-service communities they love. Customers are recommended related articles, questions, experts, and topics – so they can find the right information, faster – illuminating the quickest path to the best information. Einstein Recommendations also tracks the most popular pages, questions, and articles, so you can embed predictive intelligence in communications with your customers and deliver the best product, content, or offer suggestion every time.

DELIVER PREDICTIVE SERVICE WITH CONNECTED PRODUCTS

With 21 billion connected devices expected by 2020 (Gartner), there are enormous opportunities for proactive service. With the right Internet of Things technology, these connected devices can communicate with your company every day, enabling your business to predict customer needs and reach out to them proactively, even before the customer realizes there might be a problem. Additionally, Analytics Cloud presents the data in a clear, visual way so agents and managers can leverage and understand that data to deliver better service. This is truly a customer service game-changer, and as more connected devices flood the marketplace, this type of service will be the norm, not just a differentiator.

"58% of consumers expect that by 2020, companies will provide products that can self-diagnose issues and automatically order replacement parts or service."

– State of the Connected Customer Report

STEP 4

Connect Service on One Intelligent Platform

When customer service systems aren't connected to each other or integrated with the systems that sales and marketing teams use, agents aren't able to have complete and up-to-date insights into customers. This means agents are losing valuable opportunities to build a stronger relationship with customers, cross-sell, and upsell.

If your customer service system is an outdated, on-premise technology, gaining the benefits that come from integrating your customer service solution with other systems is challenging. On-premise technology is inflexible and prevents service organizations from being their best. Customers are completely changing, and the billions of connected devices is just the start of the transformation, which means that customer service needs be flexible in responding to evolving customer preferences.

So what happens if we connect service to a complete customer success platform? Insights are shared easily and quickly across the organization so every department can work better together and wow customers. An extensible, flexible cloud technology platform with built-in innovation can augment existing on-premise systems – or replace them completely – to enable businesses to deliver service the way your customers want, on the devices of today and tomorrow.

"Salesforce for Service decreases support costs by 22%, according to the Salesforce Customer Relationship Survey."

CREATE AN AGILITY LAYER ON TOP OF LEGACY SYSTEMS

Unlike point solutions that only offer a solution for customer service, Salesforce for Service is built on the **Salesforce platform** – the world's most trusted enterprise cloud platform – where security, agility, and extensibility come built-in, providing peace of mind and the ability to adapt and respond quickly as your needs evolve over time.

Our open APIs allow you connect your back office and service systems to Service Cloud, allowing you to bring in customer data from various systems into one view.

Salesforce for Service eliminates the need for your agents to log into multiple, disparate systems to access customer information. Instead, they can log into one system to do their work and access a complete, 360-degree view of the customer--maximizing their productivity and allowing them to deliver a better customer experience.

And when you need to create new workflow rules or make customizations within Service Cloud, you can do so with minimal or no code – so that your IT team can focus on innovation instead of maintenance.

CONNECT ALL APPS AND DATA ON THE WORLD'S MOST TRUSTED PLATFORM

When your service infrastructure is connected with all your business apps and data on the most secure, reliable, and trusted enterprise cloud platform, you have the tools you need to scale with ease. The Salesforce platform is trusted by top companies around the world. Programmatic Security, Trust and Visibility – it all comes standard. Plus, the Salesforce multitenant model eliminates the complexity and risk of entire hardware and software stacks that need to be maintained and managed for each application deployment. This means that Salesforce can deliver three major, automatic upgrades a year seamlessly that won't break your customizations.

TURN A GREAT SERVICE OPPORTUNITY INTO A SELLING OPPORTUNITY

There's good reason agents should have access to complete sales information: they can identify upsell and cross-sell opportunities. Your service department could be a lead-generating machine. But agents can't identify these opportunities to grow the business without the right insights available at their fingertips. Not only can agents use a great service experience as an opportunity to upsell, but the sales department can utilize critical customer service case data to avoid potential disaster, such as reaching out to a customer right in the middle of a big service problem.

STANLEY
Healthcare

STANLEY Healthcare is Delivering Tomorrow's Healthcare Experience, Today

The healthcare system is undergoing a fundamental change where it has to be more efficient and improve the patient experience. STANLEY Healthcare is leading the way to ensure healthcare providers thrive in this new environment by strengthening security, safety, and workflow optimization. STANLEY Healthcare is not only embedding customer service into its solutions, but it is connecting and analyzing the real-time data from its wireless devices to continuously improve the service it provides and the reliability of its solutions. It's a core component of STANLEY Healthcare's By Your Side commitment to be a constant presence at the side of its customers for their ongoing success. STANLEY Healthcare can identify issues before they even happen, provide that information back to their customers, and move faster than ever.

"We need to be able to move fast. Actually, moving fast isn't even good enough. We need to be able to react in a proactive manner."

– Greg Borecki,
VP Sales, International and
Strategic Accounts

How does it work? For STANLEY Healthcare's Hugs® Infant Protection solution, newborn babies in hospitals wear Hugs tags that are matched to their mothers. With Wi-Fi tracking and alerts, the hospital staff knows exactly where each infant is at all times, keeping every baby safe. It's absolutely crucial that STANLEY Healthcare identify potential issues with the Hugs solution and troubleshoot before the problem actually arises. The Hugs solution is generating data and information constantly. With Salesforce, STANLEY can collect that data, review it, and proactively communicate with the customer so that issues are resolved before they happen.

With Salesforce for Service, all of STANLEY Healthcare's service processes are integrated seamlessly – from field service technicians to the self-service community where STANLEY Healthcare customers can troubleshoot product issues, request on-site service, browse a rich library of articles and videos, or pose questions within community discussion boards to collaborate with peers. Salesforce for Service aggregates all of those customer touchpoints and serves it up to the customer support agent in the Lightning Agent Console. The agent is always armed with the right information and data to make each customer interaction a positive experience that builds customers for life.

CONCLUSION

Delivering ROI in the Age of the Customer relies on differentiating with conversational service and more connectivity than ever between customers, agents, and managers. Seven out of 10 Americans said they were willing to spend more to receive a better service experience (American Express Survey), don't let your technology stop you from keeping your customers happy and coming back for more. With Salesforce for Service, companies are able to differentiate with service on a flexible, complete CRM cloud platform by empowering agents and managers to engage customers with conversational service.

The results? Salesforce for Service customers have some huge numbers to show for it:

- ⊘ Save 22% in service costs
- ⊘ Increase customer satisfaction by 35%
- ⊘ Increase agent productivity by 28%
- ⊘ Solve cases 31% faster

WHAT IS SALESFORCE FOR SERVICE?
Salesforce is the only vendor who can deliver service for every conversation, from high-touch conversations like field service visits to low-touch conversations like in-app mobile service, and no touch conversations like a customer community and connected products. Learn more about how Salesforce for Service can revolutionize service for every customer touchpoint.

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY