

# SALESFORCE SERVICE CLOUD®: ENABLING THE CUSTOMER- CENTRIC ORGANIZATION

BUSINESS  
CONSULTANTS

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## **Customer service** is the new face of organizations today.

The role of customer service agents has evolved. They have become the face of your company, with more customer touchpoints than any other individual in your organization. Historically, agents dealt with primarily one inbound channel, the phone, but today they are faced with phone, web, e-mail, social channels, and now their connected products. Today's customer expects a seamless end-to-end experience, whether it is placing a new order, inquiring about the status of an existing order, or reporting an issue with one of your products. In addition, customers want self-service options to solve issues on their own and low wait times for customer service agents, and they expect resolution of issues on the first call.

In this paper, we will take a closer look into the role of the service organization and how the Salesforce Service Cloud® is helping organizations deliver exceptional customer service.

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## **Customer-centric service**

Customer service is more important now than ever before. Improving agent productivity, reducing call handle and response times, and improving first-call resolution rates are critical business objectives. Inbound channels into the contact center have exploded over the years to encompass phone, web, e-mail, and social channels. Companies that have embraced these channels by integrating them into their contact center systems have seen success in customer satisfaction, retention, and selling new products and services to their customers.

A natural evolution that we see is the integration of connected product solutions into the customer service organization. Whether you call these solutions Internet of Things (IoT), Internet of Customers (IoC), Machine-to-Machine (M2M), or Connected Products, one thing remains the same: The customer is at the center of the relationship as it relates to products and services being sold. This is the latest channel that customers will expect to be tied into and visible to customer service organizations.

**A natural evolution is connecting products into customer service organizations.**

Companies must meet customers where they already are or run the risk of losing them to competitors. As salesforce.com® says, “The Internet of Customers is redefining the customer experience.”

## **How can your organization differentiate its service offering?**

Organizations that invest in service center solutions are seeing huge gains in profitability and efficiency. Agents are more productive: They feel more empowered and, in effect, we are seeing a loyalty renaissance in the employee-to-employer relationship model. Service center and field service agents are no longer reacting to customer issues, but now have access to tools that proactively and in some cases preventatively notify them of issues. Additionally, with Community platforms, agents are now becoming an integral part of the solution as they contribute to and share an ever-expanding knowledge base of information with their customers.

Customers now have access to customer portals that satisfy their long-driven desire to “fix the problem” themselves. Let’s face it: Today’s customers want access to the information that can help them fix problems on their own. Additionally, companies that use third-party contractors to install their products are using Community platforms to access the information they need. This is great news for companies, as they are seeing satisfaction increase while increasing call deflection rates and reducing in inbound call volume.

Placing the customer at the center of your service model is the fastest way to see significant productivity gains. With 75 percent of all customer interactions originating with your customer service organization, it is imperative to build holistic service solutions that extend across your entire enterprise.

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Organizations that have invested in these solutions are reporting the following average statistics\*:

- 35 percent decrease in support costs
- 40 percent increase in agent productivity
- 34 percent increase in customer retention

\*source: salesforce.com

But don't take our word for it. See what industry leading analyst firms like Gartner are saying about salesforce.com.

**“The salesforce.com product for customer service has an excellent GUI, simple design tools, intuitive navigation and a good understanding of the importance of Web communities.”**

*Michael Maoz, Research Vice President, Gartner*



Let's take a look at three ways you can leverage the Service Cloud to enhance your service engagement strategy. It all starts with a focus on self-service solutions, agent productivity enhancements, and reporting and dashboards.

### 1. Self service: Empower your community

A great way to build enterprise-wide visibility while reducing your costs is to invest in self-service programs. Self-service programs are now providing customers with real-time data and content that is easily and readily consumable. Whether you are a customer looking to view your active warranty or a contractor that needs access to the SLA for a work order, companies that offer these resources in a Community are seeing heightened levels of service and satisfaction.

**The customer wants an intuitive user interface and self-service options.**

Today more than ever, service organizations are dealing with a more tech-savvy customer. Today's customers demand real-time digital access to a platform with an easy-to-use interface. They want a seamless customer experience. Service organizations that can meet a customer where they are will have a competitive advantage. Providing a consistent experience across all stakeholder channels (traditional, social, connected products) for your brand and your service/sales organizations is critical.

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**Key takeaways for building self-service solutions:**

- **Build a community.** Invest in a Community platform where your customers, employees, and partners can all work together to solve problems
- **Contribute articles.** Empower your customers with the knowledge and tools they need to reduce the burden on your call center by building your knowledge base in the Service Cloud
- **Personalize the experience.** No customer wants to be just another face in the crowd. Take the anonymity out of the equation for your service teams by equipping them with a 360-degree view of each customer. Deploy Live Chat for rapid customer engagement.

## 2. Agent productivity: Do more for your customers with fewer agents

One of the larger challenges of service centers is the time it takes to locate critical customer data. We like to call this the “swivel chair effect.” Service centers that can reduce the number of times an agent has to switch applications or take time to consult with a fellow agent about a customer question will realize efficiency gains upward of 40 percent. The Service Cloud Console provides agents with a platform to drive faster customer issue resolution. The Console brings together key customer data all into one screen at the agents’ fingertips. In addition, agents can take advantage of features like “Case Swarm” to take advantage of subject matter expertise to quickly resolve a customer case. Not only does the Service Cloud Console provide a unified interface for a single source of data access and retrieval; service centers can now collaborate in real time to “crowd swarm” case resolution.

The power is in the numbers when it comes to collaboration. Having a platform in place that can easily bring the right resources together to resolve an issue is critical. Features like Salesforce Chatter also increase collaboration and visibility to resolve issues quicker than ever before.

Your service teams will close cases faster. Tools like Service Cloud Console, Chatter®, and Case Swarm are improving the efficiencies of contact centers. Integration of legacy or back-office applications into Service Cloud completes this picture. Having a single platform for your agents to access customer information will drive time savings across your organization.

**Key takeaways for agent productivity:**

- **Reduce swivel chair.** Reduce the number of touchpoints your service teams need when solving customer problems
- **Crowd source answers.** Build a collaboration culture in the platform and have the right knowledge articles available on-demand to increase productivity
- **Integrate strategies.** Bring all customer data into one platform for your customer service agents

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### 3. Reports and dashboards: Real-time access to performance metrics

When developing reports and dashboards for your organization, it is important to first define what your executives (CEO, VPs of Sales, Service, Marketing, Field Services) and your other channels need to more effectively run their business. What key metrics do you need to capture, and who needs access to the data for analysis?

Defining the metrics you need upfront and aligning these to your business objectives is the first step. Establishing these metrics will help you forecast more accurately, assess your performance against service level agreements, even assess new sales opportunities that are being created within your organization. The reports and dashboards are only as good as the data in the system. Having a system that is easy to use and intuitive helps drive data capture among your employees.

For example, if your Service team wants to evaluate its call handle time effectiveness over a certain time period, you'll want to track each case resolution time from start to finish and roll up the summaries in an overall dashboard report to track your progress based on the timing intervals you want to track. You can break these reports down across service teams or individual service agents to benchmark where you are succeeding and where there is room for improvement. Snapshots in the Platform are a great way to quickly review your dashboards on the go. These are high-level dashboard reports, which can be automated to send daily, weekly, or monthly reports right to your e-mail or mobile device.

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#### **Key takeaways for agent productivity:**

- **Manage what you measure.** Pick a limited number of key performance indicators (KPIs) or metrics to manage at first. This will help with user adoption and will be easier for stakeholders to digest; this will help to focus on what is most important
- **Develop a clear, concise naming strategy.** Establish a universal naming strategy across the organization for reports, dashboards, and folder structure
- **Define security and access permissions.** Define data security and access permissions before rolling out reports and dashboards