



Customer Experience:
**Five best practices for
connecting customer
service resources**



1 Don't let the unexpected disrupt your customer service engine

When things change in an instant, can your customer experience engine keep up? Are you prepared to overcome resource constraints, keep remote and on-premises employees connected and productive, handle spikes in customer requests, and address potential issues before customers know about them? It's a big ask, but if you can maintain predictably high service levels during unpredictable times, then your organization is one step closer to delivering frictionless service that will build loyalty.

A key element to driving successful customer experiences, is creating cross team connectivity within your service organization. Why? The reality is many customer service cases are not resolved by the contact center alone. Often the front, middle, and back offices, as well as the field teams, must have a meeting of the minds to resolve complex issues. But this isn't a sustainable approach – front line agents can't constantly ring the call center to get customer history or find the location of a part that needs to be accessed, this will only lead to customer and colleague frustration.

What's needed are automated workflows that can empower customer service and support teams to be more productive and deliver frictionless service and effortless experiences. It starts with connecting teams to a single system of action.

Benefits of a single system of action

With a single system of action, companies have complete visibility into consolidated, real-time information that allows them to automate and orchestrate work like never before. The single system of action is the engine that drives all areas of the business to think and act as one in the best interest of the customers. An obvious example would be customer service agents and frontline service technicians having access to the same customer history information.

A fundamental shift is underway thanks to the strong emphasis put on connectivity. Companies are seeing how by leveraging a single, integrated system of action—powered by one platform, one architecture, and one data model— the customer experience is transformed. This approach unites teams, processes, and systems across products, services, and subscriptions for each customer.

Once this foundation is in place it's possible to start thinking about further advancements to your customer experience machine including strategic automation and a proactive approach to service.



CUSTOMER EXAMPLE

NICE

72%

reduction in back-end case volume

450K

in company savings

8X

increase in speed for opening new cases

NICE implemented a new case ownership model that is skill-based rather than tier-based. After implementing ServiceNow® Customer Service Management, the company elevated customer support to new levels of speed, efficiency, and quality.

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With Customer Service Management, ServiceNow was able to give us a very flexible foundation on which we could deliver modern customer service capabilities.”

Eyal Lubin, VP of Cloud Operations, NICE



Discover ServiceNow® Customer Service Management

ServiceNow® Customer Service Management goes beyond traditional solutions by harnessing the power of the whole organization to serve customers. It helps your customer service teams solve customer problems by bringing front, middle, and back offices together, proactively addressing customer issues, and enabling more self-service through automation. The results: experiences that drive customer loyalty, reduce case volume and lower costs.

With Customer Service Management, it's possible to permanently fix—and even prevent—issues by connecting customer service to other departments and automating processes across teams for faster resolution. Customer service can identify and assign issues directly to field service, engineering, operations, finance, legal, and other departments and track those issues to resolution. And when the problem is solved for one group of customers, future customers won't experience it.

We know every business has different needs, and that's why Customer Service Management groups key applications and capabilities into scalable packages that can grow with you as your needs change.

[Learn More](#)

2

Organize resilient teams and create robust processes to deliver consistent service



When the parameters of your customer service environment change suddenly, make sure your customer experience team and field service agents are empowered to do their part. If you have processes in place that can solve the high-impact problems your customers are facing, you will be able to deliver consistently good experiences that could create loyal customers for life. Getting customers what they need faster and with less friction is the key to a truly great customer experience and a unified organization.

This requires fixing broken, manual processes and information silos between your frontline agents and your middle office, back office, and field teams. Front line agents shouldn't have to spend so much of their time on routine tasks that can be taken care of using automated tools. If your customer service processes weren't digital before, they need to be now, with an emphasis on rolling out capabilities that:

- Break down silos and automate processes across teams
- Proactively monitor products and services to detect and prevent potential issues
- Identify opportunities for automation and efficiency

Let's look at these capabilities in more detail...

CUSTOMER EXAMPLE

proximus

10K

cases resolved per month

30K

customer portal users

1

platform provides full visibility and control

ServiceNow® provided Proximus with an optimized, customer-centric platform to deliver customer service and IT support. An agile methodology was used throughout the ServiceNow implementation, which supports one of Proximus' strategic priorities of becoming an agile and flexible organization.

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We needed to move away from using multiple tools to create one standardized platform, increase ownership and accountability, and break down barriers within the organization.”

Lorenz Vandamme, Agile Product Manager at Proximus.



3 Break down silos and automate processes across teams

If customer service agents have to rely on a mixture of internal emails, phone calls, and chat apps to get information or implore action from middle and back-office teams, your team will struggle to create quality solutions with efficiency. Frontline agents without access to automation tools are 26% more likely to worry about their skills becoming obsolete, two times less likely to promote their employer to others, and two times more likely to be looking for other job opportunities.¹

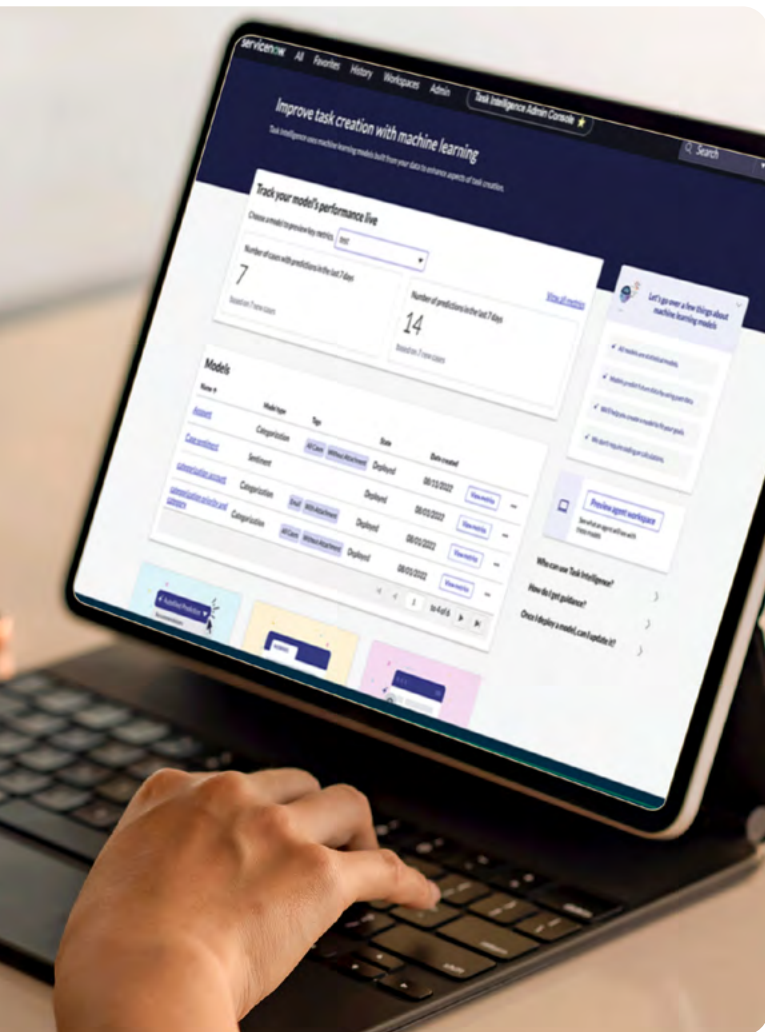
The only way to solve issues quickly and permanently is to break down information silos and automate processes across teams. Routine activities that would normally take up valuable time with agents using manual processes can be significantly reduced through strategic automation. While tactical automation can be beneficial, it does not unlock nearly as much potential for front-line workers and the company as strategic automation can.

When everyone has access to the same source of truth and can track the progress of an issue, from its inception to resolution, you can make sure everything gets done efficiently and correctly. This requires effective:

- **Workflows and task assignments** that automate the flow of work to the people or teams that are best able to complete the task, either in the appropriate order or in parallel, to minimize delays and maximize efficiencies. Personnel should be notified of the assignment and able to manage and track its status to keep things moving.
- **Service management** that integrates incident, problem, change, and request processes into case management to ensure the right workflow can be initiated. This holistic approach provides transparency and accountability, allowing everyone to see and track trend and root cause analyses, configuration reviews, and solutions and workarounds, to minimize service disruptions, accelerate root cause resolution, and speed up service restoration.
- **Customer project management** that enables organizations to manage the entire project lifecycle for their customer accounts, including complex projects with multiple tasks. Agents and customers should have access to the available data and individual tasks and the status of overall projects status.

Let's explore ServiceNow options that enable these capabilities.

Task Intelligence offers several AI capabilities such as language detection, multi-lingual case categorization, Sentiment Analysis, and Document Intelligence.



ServiceNow® Task Intelligence in action

Existing methods for receiving, reviewing, and resolving issues are highly manual and time consuming for customer service teams. 79% of customer service teams experience issues often or always, when routing inquiries to other departments manually¹. With Customer Service Management from ServiceNow® the associated workflows are digitized and processes across teams can be automated, allowing for an issue to be resolved much quicker.

With the introduction of the ServiceNow Task Intelligence module for Customer Service Management, automated workflows, employee empowerment and customer satisfaction can be taken to the next level.

Task Intelligence offers several AI capabilities such as language detection, multi-lingual case categorization, Sentiment Analysis, and Document Intelligence. These capabilities automate several routine tasks across the case lifecycle and enable agents to focus on complex case resolution.

Machine learning-based, multi-lingual case categorization can evaluate text in emails and cases created in different languages to predict and automatically populate fields on a customer case record. The Language Detection feature can identify up to 20 different languages, and once identified, the cases are routed to assignment groups and agents with the necessary language skills to help the customer.

Sentiment Analysis can detect and display the initial and ongoing customer sentiment by evaluating email and case text. This in turn helps agents gauge customer emotions and better prioritize their work while enabling them to provide more empathetic and compassionate customer experiences.

Document Intelligence goes beyond simple optical character recognition (OCR) to accurately extract information to automate document processing, even when the documents have varied text, formatting, and templates.

SOURCE

1. IDC eBook, sponsored by ServiceNow, [Why Strategic Automation Empowers Employees to Deliver Effortless Customer Experience](#), IDC #149378222, Aug 2022



The moment an issue (such as an outage or a bug) is detected and identified, workflows can be proactively triggered and customers can be notified of any issues leading to a lower inbound call volume.

ServiceNow® Proactive Customer Service Operations in action

With ServiceNow, customer service teams are empowered to effectively monitor the health of their products and services. The moment an issue (such as an outage or a bug) is detected and identified, workflows can be proactively triggered and customers can be notified of any issues leading to a lower inbound call volume.

If you identify any service disruptions to a customer's install base, you can proactively create a case to notify them. These cases are resolved and closed in the same way as customer-reported cases. When multiple customers are affected, you can use the major issue management process.

You can also associate outage information to a case to keep your customers informed about the impact of the outage and the status of the resolution. It also gives customers visibility into planned service disruptions, enhancing transparency and reducing the number of customer-reported cases. Your customers can use the Customer Service Portal to view proactive cases that you opened on their behalf, any outages associated with their install base, and interact with you using the proactive case. Your organization can pre-emptively notify customers and customer service agents of the issue and provide the fix or expected timeline for resolution. Both parties can track activities and monitor the progress of the case, so everyone knows what steps have or need to be taken, as well as when service will likely be restored.



4 Proactively monitor products and services to detect and prevent potential issues

The saying goes, "an ounce of prevention is worth a pound of cure"—that's certainly true for customer service. If you can prevent downtime altogether, you will avoid inbound customer calls and potential customer dissatisfaction and frustration. Telling customers about a problem and letting them know you have fixed it or are working on the solution before they detect it themselves can go a long way towards building up trust and fostering loyalty. Your customers expect and deserve a great experience - prevent issues from reaching them to reduce friction and deliver greatness. To help you get ahead of problems, you should:

- **Look for tell-tale warning signs and potential bottlenecks or outages** that can help IT and service agents monitor customer products and services to identify potential issues. Once detected, the appropriate digital workflows can be initiated to ensure the right steps are taken by the right people to fix the issue or prevent it altogether.
- **Develop a service-aware install base**, so it is easy to understand exactly which customers have and are using a product or service. As soon as an issue is detected, all potentially impacted customers can be notified of the issue, fix, or timeline for resolution, using major issue management workflows.
- **Leverage the major issue management process** that enables similar cases to be managed as a single case, so they only have to be solved once. One actionable system of record can be established for issues that affect or are relevant for more than one customer to streamline their handling and enable pre-emptive notifications and mass communications that build rapport and trust.



5 Identify opportunities where strategic automation can improve efficiency

A successful customer service organization is one that works smarter and not just harder or faster. Strategic automation is a methodology that can support this team goal when applied correctly. To maximize success, management must first understand where tedious manual entry tasks, bottlenecks, repetition of processes and duplication of work occur. The next step is to leverage technology and streamline processes to improve efficiency, before finally identifying where automation makes sense in the chain. Remember, automation should always be a value-added augmentation of your own unique culture and methods of customer service. When deployed strategically and successfully, automation will ultimately free up customer service colleagues to work on more business-critical tasks.

In order to locate opportunities to implement automation and improve efficiencies across your customer service teams, leverage the following technologies as a starting point:

Performance analytics that equip service teams with management dashboards that measuring the effectiveness of your processes and applications, while helping to uncovering trends in the data. Having access to current data ensures you have your finger on the pulse of your customer service organization and helps you deliver an effortless service experience for your customers and make more informed business decisions across the company.

Predictive intelligence that uses machine learning and artificial intelligence (AI) to uncover ways to boost results by organizing, clarifying, then assigning, tasks to relevant teams. With Predictive Intelligence, historical data is organized and then compared against to help identify patterns across customer cases. This data can be analyzed to solve a current issue by replicating the past methodology that achieved success. It can also categorize and correlate a cluster of similar open cases together to identify a major incident.

Let's explore ServiceNow options that enable these capabilities.



ServiceNow® Performance Analytics in action

ServiceNow® Performance Analytics is an in-platform process optimization solution to create management dashboards, report on KPIs and metrics, and answer key business questions to help increase quality and reduce the costs of service delivery.

Customer service managers can leverage Performance Analytics generates accurate historical trends by capturing continuous snapshots on a regular schedule. It helps businesses understand what is happening in their organization over time: In addition to calculating trends from snapshots, with Performance Analytics you can: track performance against targets, set alerts when thresholds are met and forecast future performance.

ServiceNow® Predictive Intelligence in action

ServiceNow® Predictive Intelligence is a powerful –yet, approachable and attainable –set of machine learning capabilities that that effectively integrates with your ServiceNow workflows to enhance business efficiency and improve service. Using a patented machine learning engine, Predictive Intelligence helps teams work faster by recommending content to agents after making connections between incidents, cases, alerts, and knowledge articles.

Predictive Intelligence also accurately categorizes, assigns, and prioritizes incoming requests, freeing your teams to focus on the problem solving that humans do best. These capabilities make adopting machine learning simple and accessible for businesses looking to reduce manual intervention, improve customer satisfaction, and elevate employee productivity.



ServiceNow® solutions, products and applications mentioned in this guide

ServiceNow® Performance Analytics for Customer Service

ServiceNow® Predictive Intelligence for Customer Service

ServiceNow® Proactive Customer Service Operations (Plugin)

ServiceNow® Task Intelligence for Customer Service

SOURCES

1. [IDC eBook, sponsored by ServiceNow, Why Strategic Automation Empowers Employees to Deliver Effortless Customer Experience, IDC #149378222, Aug 2022](#)

About ServiceNow

ServiceNow (NYSE: NOW) is the fastest-growing enterprise cloud software company in the world above \$1 billion. Founded in 2004, its goal is to make work easier for people. Our cloud-based platform and solutions deliver digital workflows that create great experiences and unlock productivity for more than 6,200 enterprise customers worldwide, including approximately 80% of the Fortune 500. For more information, visit www.servicenow.com.

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