Customer operations: Six best practices for connecting customer service resources
Don’t let the unexpected disrupt your customer service

When things change in an instant, can your operational processes keep up? Can you overcome resource constraints, keep employees connected and productive when they are working from home, handle spikes in customer requests, and address issues before customers know about them? If you can deliver predictably high service levels during unpredictable times, your customers will notice and thank you for it.

The reality is many customer service cases are not resolved by the contact center. Often the front, middle and back offices, as well as the field teams, need to come together to resolve complex issues. Relying on extreme heroics in the contact center to solve one problem and then the next is not sustainable. What’s needed are repeatable, automated workflows that ensure everyone knows what needs to be done and can do it, wherever they are, whenever it’s needed. In the ideal scenario, potential issues can be identified and fixed before customers ever see them. So, how do you achieve this level of seamless, cross-organizational assisted service?

NICE implemented a new case ownership model that is skill-based rather than tier-based. Now, required skills are identified during case creation, with ServiceNow automatically routing cases to people with the right skills and availability. And, more intuitive processes combined with a more engaging user interface have helped NICE reduce back-end case volume by 72%, saving $450,000 a year.

LEARN MORE
When the parameters of your customer service environment change suddenly, make sure everyone is available and ready to do their part. If you 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.

This requires fixing broken, manual processes and information silos between your frontline agents and your middle office, back office, and field teams. 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...

“Our shift to digital has meant rethinking the way customer service and IT service delivery work within our organization. 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
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, things will never be done fast or even well. The only way to solve issues quickly and permanently is to break down information silos and automate processes across teams.

When everyone is working together 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 be kept up-to-date on individual tasks and overall project status.

ServiceNow Task Management in action

ServiceNow digitizes the workflows associated with resolving an issue to break down silos and automate processes across teams. The workflow is broken up into tasks, which are automatically categorized and routed to the right person or team to address. There may be one or many tasks in a digital workflow, all of which are monitored and tracked in the case to ensure ongoing progress. For example, when a customer:

• Requests a refund due to a billing error, a task is created for the case and routed to finance. An operational level agreement (OLA) is included to ensure it is prioritized and completed on time.

• Needs to replace a lost credit card, multiple tasks are kicked off simultaneously: Send a new card to the customer. Turn off the old card. Perform fraud detection. Do compliance reporting. By using tasks to monitor and manage the steps in a case, everything can happen in the order it should, or in parallel, to speed resolution.
ServiceNow Proactive Customer Operations in action

With ServiceNow, organizations (and customers) can monitor the health of their products and services. The moment an issue, like a service outage or a bug, is identified, a case can be initiated that triggers a workflow to start addressing the problem.

If the outage is something that could affect more than just that one customer, the organization can identify, communicate, and track the case for all impacted customers. They can pre-emptively notify customers of the issue and provide the fix or the expected timeline for resolution to reduce inbound calls and agent case load. The customers, customer service agents, and operations team will all be able to 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. That’s good service.

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.

To help you get ahead of problems, look for:

• **Proactive customer operations** that 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.

• **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.

• **Major issue management** 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.
Identify opportunities for automation and efficiency

Getting results out of your customer operations is often not about having employees work faster, but smarter. If you can analyze current and past performance across teams, you can identify bottlenecks and inefficiencies holding your service delivery back and increasing work volumes. You can take action to improve experiences and outcomes.

To identify opportunities for automation and efficiency within your customer operations, look for ways to apply:

• **Analytics** that can unlock value with out-of-the-box content for measuring the effectiveness of your processes and applications against industry KPIs and benchmarks. Access to current data can help you make better decisions and track your ability to deliver the experience your customers expect.

• **Predictive intelligence** that uses machine learning and artificial intelligence (AI) to uncover ways to boost employee productivity and results. Connect the dots for employees by suggesting relevant tasks and content to help them solve issues faster. You can reduce manual work and errors by using historical data to automatically classify tasks, incidents, and cases at scale.

Now on Now

Using Performance Analytics, ServiceNow created an overall “red line” dashboard showing the average number of cases per customer and how this was changing over time. With this real-time dashboard, executives could see historical trends and future case volume forecasts. This created a baseline to measure and drive improvement.

Next, they broke down the red line by product or service area, giving each manager their own individual dashboard. With this dashboard, each manager could see how their individual area was performing—using Performance Analytics to profile the types of cases that customers were reporting.

This enabled them to identify high impact opportunities to automate customer requests and reduce inbound contact volumes. They were able to reduce customer-related cases by 3,500 a month, freeing customer support to focus on more complex issues.
Best practices

#1 Scale your customer operations
Digitize customer operations and automate processes to streamline service delivery across the organization to ensure it is easy for your front, middle, and back office teams, as well as your employees in the field, to do whatever is necessary to meet the needs of the customer.

#2 Connect customer service to the entire organization
Eliminate disconnects and information silos to ensure everyone involved in providing service to a customer can track and manage the progress of the customer’s request or issue, from inception to resolution.

#3 Consolidate work with major issue management
Enable similar cases to be managed as a single case, so they only have to be solved once. Establish a single actionable system of record 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.

#4 Use task assignments to maximize productivity
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, maximize efficiency, and increase accountability.

#5 Enable proactive customer operations
Help IT and service agents monitor customer products and services to identify potential issues. Once detected, ensure it is easy to initiate the appropriate digital workflows to ensure the right steps are taken by the right people to fix the issue or prevent it altogether.

#6 Reduce work volume by identifying opportunities for automation and efficiency
Analyze current and past performance across teams to identify bottlenecks and inefficiencies that are holding your service delivery back, so you can take action to improve experiences and outcomes.
ServiceNow prepares your customer service for whatever the future may bring

We know that delivering predictable customer service when the world is anything but predictable requires bringing the front, middle, and back offices and field teams together to fix customer issues. It takes tools and processes that can span the entire organization to ensure everyone and everything can work in concert to meet changing customer challenges and needs.

ServiceNow gives you a customer service platform that empowers your extended team, so you can handle whatever comes your way. ServiceNow goes beyond traditional solutions to provide the digital workflows you need to expand capacity via automated self-service, organize resilient operations, and manage location-based work efficiently and safely. As a result, you can be confident you can respond fast to keep your customers satisfied and your business running efficiently, today and tomorrow.

Introducing ServiceNow Customer Service Management

ServiceNow® Customer Service Management delivers on both customer engagement and customer operations with digital workflows for solving customer problems by bringing front, middle, and back offices together, proactively addressing issues, and instantly handling common requests.

Introducing ServiceNow Field Service Management

ServiceNow® Field Service Management manages location-based work efficiently and safely by sending the right people and equipment to complete work the first time, maximizing uptime by fixing problems before customers know they have them, and improving technician efficiency to meet service level agreements.
About ServiceNow

ServiceNow (NYSE: NOW) is the fastest-growing enterprise cloud software company in the world above $1 billion. Founded in 2004 with the goal of making work easier for people, ServiceNow is making the world of work, work better 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.