Proactively address issues to create superior customer experiences

Five key capabilities to intelligently fix problems before customers even know they have them
When products have problems or services go down, it affects customers’ confidence in a brand’s ability to deliver on its promises. It goes without saying that when issues arise they need to be solved quickly and easily.

But what if problems and disruptions could be prevented in the first place? What if issues could be resolved before they have a chance to impact the experience of customers? By taking a more proactive approach to customer service, you can do just that. Instead of learning about problems from your customers and responding, you can get ahead of issues and address them.

Proactive service helps reduce contact center volumes and create a better customer experience. One company prioritizing proactive service in a digital transformation initiative improved their customer satisfaction ratings by more than 25 points. Of course, this is easier said than done.

This ebook details the five key capabilities needed to establish proactive customer service, which include being able to:

1. Identify what customers have purchased and use
2. Monitor the health of your products and services
3. Preemptively inform customers of service events and solutions to problems
4. Efficiently manage issue resolution across your organization
5. Constantly identify new ways to improve service quality

Let’s look at each to understand how they will help you proactively address issues to meet your customers’ expectations and deliver on your promises.
1. Identify what customers have purchased and use

Knowledge is power. For proactive customer service, you must know not only what customers have purchased, but also what and how they are using those solutions and services. This level of detail is key to uncovering potential issues, as well as quickly identifying which customers may be impacted when a particular problem arises and how best to remediate it.

Many digital services are highly customizable, which means the same service can look very different for different customers. The service’s configuration, add-on capabilities, maintenance, and support are just a few examples of things that can be tailored to meet the needs of a customer. As a result, it is important to model complex products and services, including all their components and sub-components. This will give you a complete picture of exactly what customers have and a critical understanding of what customers are and are not using.

This level of detail can make it easier to uncover trends and root causes that can help head off issues. It can also help target communications to only the people that need to know about an issue. For example, if a problem arises that is specific to a particular component, configuration, or feature set, you don’t want to send out a blanket communication to all customers. Instead, a much more personalized approach would be to only target outreach to the customers potentially affected by that issue. With a real-time, detailed view of what customers are using, you can ensure your outreach pinpoints the customers who care and no one else.
2. Monitor the health of your products and services

You don’t have a crystal ball, but wouldn’t it be great if your customers thought you did? By continuously monitoring the health of products and services, it is easier to identify potential trends and early warning signs that can enable the prediction and potential resolution of issues before they occur.

For example, if traffic starts to slow down or a server goes offline, you may be able to spin up other resources to handle the load and ensure the service’s ongoing availability and performance. Or if customers using a specific feature are beginning to have problems, or real-time IoT data indicates equipment under certain conditions is starting to fail, you can focus efforts and make changes that will head off those issues.

The more information collected to help monitor the health of your products and services, the better. Often this information comes directly from the products and services themselves, but it may also originate from frontline customer service teams, the website, customer portal, or any number of other sources. The key is to ensure everything is connected, via a single system of record, and constantly analyzed to extract meaningful insights and trends that indicated a current or developing problem. This will help you get ahead of concerns, reduce the number of inbound customer calls and customer-reported cases, and take preemptive measures to lessen the impact and maybe even eliminate an issue entirely.
3. Preemptively inform customers of service events and solutions to problems

Being able to tell customers an issue is fixed (or is being fixed) before they even know they have it, goes a long way toward building confidence in your brand and loyalty to your products and services. A study by American Express found that service insight and knowledge is key to a good experience for 62% of customers. This is why it is important that customers know you are focused on keeping products and services delivering as promised, with very little, if any, effort on their part.

With proactive customer service, you can communicate with your customers on issues you have fixed, or are in the process of fixing, that they may not even know about. Preemptively keeping them informed, with targeted communications (via web, email, phone, social, etc.) on the status of the issue’s resolution, means they don’t have to waste any time reaching out to try to figure out what is going on. Notifying them when it’s time to schedule maintenance or update their service can also help extend the life and value of their purchase. These are just a few of the ways to reassure customers of your commitment to delivering high-quality products and services, backed by high-quality customer service.

Example:

Failure averted

Imagine a field service technician identifies a problem with the company’s product during a routine maintenance call. The technician can initiate a case to trigger the product manager to investigate. If the product manager discovers a part in version “7.1” of the product needs to be replaced to avoid imminent failure, they can escalate the issue to a major case to ensure all customers using version “7.1” of the product are identified. They can then trigger a workflow to automatically order the new part in the company’s ERP system for every customer affected and request the customer use self-service to schedule the part’s installation at their convenience.

There is no disruption and no hassle for the customer. They simply know the company is taking care of everything to make sure their product is working as it should. That’s good proactive customer service.
Information and organizational silos must be eliminated to ensure front, middle, and back office employees and field service teams can work as one to detect and resolve issues quickly and efficiently. To be proactive, all employees in a position to discover an issue affecting customers—network operations, field service technicians, customer service agents—needs to be empowered to trigger a case the moment a potential issue is detected and have full visibility into its resolution.

Case management and efficient workflows enable this, ensuring the appropriate details are captured and the right resources are marshalled to tackle problems, so they can be resolved possibly before customers even experience them. Steps can be automatically routed (in sequence or in parallel) to the appropriate people and teams to ensure no time is lost and everyone is focused on making progress. Status can be tracked by everyone, so delays or roadblocks can be uncovered and addressed.

If a problem can impact multiple customers, cases can be proactively created for each individual customer and then managed as one. This streamlines the tracking of all interactions, activities, and relevant information (e.g., account information, product and asset information, service contracts, entitlement details, and service level agreements) for the issue at large. There is no need to wait for customers to report or even experience the issue. It can be resolved efficiently and permanently for everyone, so it doesn’t seriously impact anyone.

4. Efficiently manage issue resolution across your organization

Empower all teams in your organization who help solve customer problems
5. Constantly identify new ways to improve service quality

Analytics can help organizations identify service trends and opportunities for continuous improvement to service quality to optimize outcomes, end-to-end. For example, cases can be monitored to see how often they are escalated, and then digital workflows can be created to trigger earlier intervention for those cases that tend to take more time and effort to resolve. The information and insights uncovered by analytics help organizations:

- **Uncover patterns and automatically create cases** to speed the resolution of issues, so they don’t impact service. For example, when conditions that could cause an error or failure are identified, a case can be created and a part auto-ordered or a system auto-restarted to apply a fix and resolve the issue, all before the customer even knows they have a problem.

- **Reduce future case volume**, by identifying next-best workflows to automate and by catching potential issues at the source before they turn into larger problems affecting customers. Intelligent technology analyzes system data to spot developing trends—identifying clusters of topics, actions, or past behavior that could benefit from automation—to help the organization stay ahead of the curve.

- **Proactively deliver feedback to product and service teams** to prioritize the most valuable features and fixes for upcoming product or service releases. Modern technology makes it possible to quantify the number of times issues or feature requests have been made, so teams better understand how issues directly affect service costs.

- **Optimize schedules**, so agents are used wisely. Varied data, such as agent availability, skill set, number of cases solved, workload, cancellations, and more, can be analyzed and used to support optimal outcomes, with respect to workforce and task assignments. This data can also surface exception cases for resolution when necessary.

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**Example: Analytics applied**

Using analytics, a company noticed a spike in problems related to a specific product. They identified a quick fix that would prevent it from manifesting. They created a knowledge base article with the steps for the fix that any customer could complete, at their convenience, on their own time. They knew which customers could potentially be affected and notified them through the customer portal to preemptively eliminate the problem and to ensure service remained uninterrupted.
ServiceNow has helped us with more than optimizing our customer service processes. They’ve helped us drive business change."

— Eyal Lubin, VP of Cloud Operations, NICE

Every day, ServiceNow proves its ability to empower our team to take a proactive approach and deliver exceptional experiences to customers. The flexibility of the platform has allowed us to develop customer-specific services, like a portal or bespoke dashboard, while managing every incident and requirement on the same system for a single source of information.”

— Natasja Wientjes, Director of Customer Service, Thales Transportation Systems

Proactive customer service from ServiceNow

ServiceNow® Customer Service Management makes proactive customer service possible. With ServiceNow, organizations can monitor the health of customers’ products and services to proactively identify potential issues. Organizations can then connect the right teams and resources, using automated workflows, to quickly resolve those issues before customers ever experience them. With ServiceNow, organizations can:

• **Monitor and identify product and service trends** to spot and proactively address potential problems before they become actual issues

• **Ensure swift, coordinated responses** to potential issues, connecting front, middle, back office, and field teams to break down silos, automate processes, and resolve issues permanently

• **Deliver a personalized customer experience**, while increasing agent efficiency, by targeting preemptive communications via personalized emails, customer portals, knowledge management systems, service catalogs, virtual agents, and online communities, to only the customers who may be affected by an issue

For more information, please visit [www.servicenow.com/csm](http://www.servicenow.com/csm).
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