

# Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service

## Assessment: The Contact Centers For Customer Service Playbook

by Ian Jacobs and Kate Leggett

September 24, 2015 | Updated: April 12, 2016

### Why Read This Report

In the age of the customer, the transformative effects of social computing and ubiquitous mobility are challenging how organizations can most effectively manage their interactions with customers. Application development and delivery (AD&D) professionals, how can you make sure your company knows how to engage with your customers in a way that keeps them loyal? How can you make sure that your company receives the best return from its investment in customer service solutions? Use Forrester's assessment tool for customer service to understand how your organization stacks up against more than 150 best practices that drive customer retention, customer loyalty, reduced cost, and increased revenue. This framework will help you define strategy, gain executive buy-in, build stakeholder consensus, manage customer service agents more effectively, and select the right technologies for loyalty-creating customer experiences.

This is an update of a previously published report; Forrester reviews and updates it periodically for continued relevance and accuracy; we revised this edition to factor in new user examples, new research, and current data.

### Key Takeaways

#### Many Customer Service Experience Initiatives Continue To Fail

Although many contact center pros recognize the need to improve customer service in the age of the customer, many of the programs they undertake miss the mark due to a lack of a clear strategy, a lack of consensus among interested stakeholders, and a lack of a robust case for investment.

#### Focus Improvement Efforts On Your Most Critical Customer Service Capabilities

Disappointment with customer service initiatives is usually the result of poorly conceived strategies that fail to focus on improving a specific set of business capabilities to increase the customer service experience or reduce costs.

#### Use The Customer Service Best Practices Framework To Pinpoint Quick Wins

Use Forrester's customer service assessment framework -- comprising more than 150 best practices evaluation criteria -- to help you quickly pinpoint the high-yield improvement opportunities.

# Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service

## Assessment: The Contact Centers For Customer Service Playbook

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### Notes & Resources

Forrester's Best Practices Framework For Customer Service is based on a synthesis of our research; interactions with hundreds of business, customer service, and technology management professionals; and evaluations of technology solutions.

### Related Research Documents

[Choose The Right Customer Service Solution For Your Business](#)

[Implement Effective Customer Service Metrics](#)

[Trends 2015: The Future Of Customer Service](#)

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## Without Focus, Customer Service Initiatives Falter

Customers demand superior service and support as the price of their ongoing loyalty and patronage. Companies realize the importance of delivering excellent customer experiences. In fact, 68% of customer service decision-makers told Forrester that improving customer experience is a top business priority over the next 12 months; for 64%, the goal is to address rising customer expectations.<sup>1</sup>

It is no wonder that in today's experience-based economy, organizations are ramping up their customer experience efforts often with executive or C-level attention.<sup>2</sup> In a number of cases, these executives have direct-line responsibility for all customer touchpoints, including the Web and the contact center.

However, simply rolling these groups under the same executive does not mitigate the challenge of aligning organizations that historically have not shared the same objectives, reporting structure, funding, business processes, data management strategies or technology, or culture. Many attempts at moving the needle on customer service experience fail. Why? Most are the results of poorly conceived strategies that:

- › **Lack focus.** Many organizations have not nailed down their customer experience strategy. As a result, organizations must make decisions about funding and the prioritization of projects meant to improve the customer experience. Of decision-makers and influencers that have made improving customer experience a high priority, just 24% have set up, or are in the process of setting up, a dedicated customer experience group.<sup>3</sup> Having a team of individuals who prioritize customer experience strategies day in and day out is one way to refocus efforts.
- › **Lack consensus.** Customer service plans can become convoluted; there are a lot of stakeholders, often with very different priorities. These stakeholders may include the executive team, technology management, customer service pros, marketing, sales, eBusiness, eService, and end users like agents and supervisors. To a VP of marketing, customer service might be the vehicle to deliver on the brand promise. To a VP of sales, customer service might be the new sales because solving customer issues has an impact on repurchase probability. And to C-suite executives, superior customer service might represent an opportunity to create a competitive advantage.
- › **Lack a solid business case.** Building a business case before getting approval for an initiative is more important than ever, especially as companies look to engage in pragmatic projects with clear returns on investments. Unfortunately, the tactical nature of customer service forces most customer service professionals to focus on putting out fires instead of strategically analyzing how the investment will provide business value and quantifying that value.

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## Four Key Elements Drive Successful Customer Service Experiences

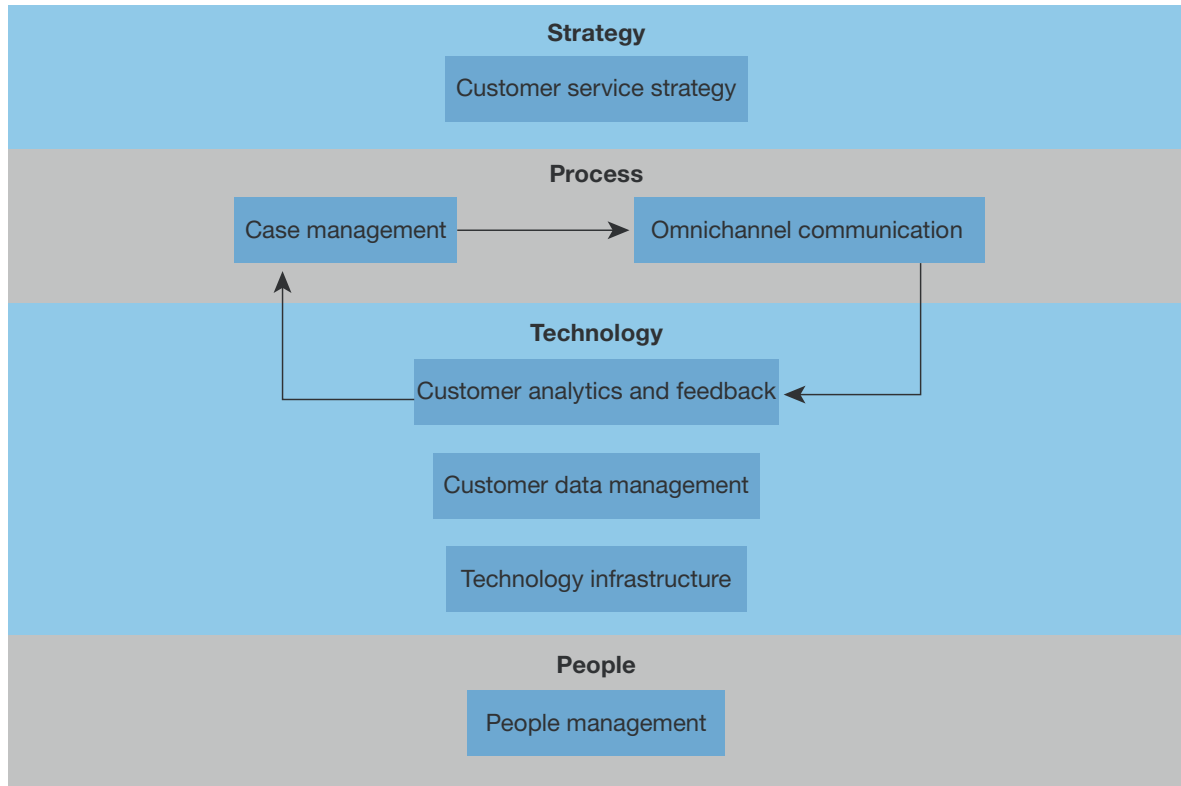
Customers want nothing more than an effortless, frictionless customer service experience. In fact, 55% of online adults say that they are likely to abandon a purchase if they cannot find a quick answer to their question; 77% say that valuing their time is the most important thing a company can do to provide them with good customer service.<sup>4</sup> The most successful customer service initiatives are framed in terms of their overall impact across the organization and are executed in focused, incremental steps with specific goals, objectives, and outcomes that result in a return on investment (ROI).

Forrester's Best Practices Framework For Customer Service defines the critical capabilities necessary for building high-quality customer service experiences that align with customer expectations.<sup>5</sup> The framework synthesizes our research; interactions with business, customer service, and technology management pros; and evaluations of customer service technology solutions. It includes eight sets of capabilities across four categories — comprising more than 150 best practices, including social customer service capabilities (see Figure 1):

- › **Strategy.** Your customer service strategy identifies the customers your organization intends to serve and articulates the customer service experience you want to deliver.
- › **Process.** Customer service process management practices are those associated with serving customers across the supported interaction channels. They include case management and omnichannel communication.
- › **Technology.** Technology solutions and tools play an important role in enabling customer service business processes; they comprise customer analytics and feedback, customer data management, and technology infrastructure.
- › **People.** How people are organized and led are important factors that affect customer service success and make up your organization's corporate culture, leadership practices, collaboration methods, training programs, and performance measurement approaches. The people element becomes even more critical considering that for most customer service organizations, personnel constitute the largest single cost.

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**FIGURE 1** Customer Service Strategy Capabilities Best Practice Assessment

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## Align Your Customer Service Strategy

Customer service pros must step up to a leadership role, align all stakeholders around a unified customer service strategy, and prioritize opportunities for quick wins and long-term innovation. Use the self-assessment to analyze your customer service capabilities and compare them against best practices to develop a vision of what customer service should be. This gap analysis will highlight areas for innovation that will yield a real ROI. Start the evaluation by assessing your company's ability to define a consistent customer service strategy across all of the channels and touchpoints used to interact with your customers. Evaluate your capabilities compared with best practices for (see Figure 2):

- › **Customer management, vision, and strategy.** This means defining the attributes of a company's customer experience; designing customer service experiences in line with the company's overall customer experience attributes; ensuring that these service experiences are consistently delivered via the communications channels — such as voice, email, chat, and social channels — and touchpoints supported; and defining the right set of metrics to measure success and uphold the company's brand proposition.
- › **VoC strategy.** Traditional surveys have low response rates — sometimes as low as 2%. As Rick Meyreles, vice president of global voice of customer at American Express, said, "Surveys cover only a fraction of the interactions the company's customers have." You must define how you will listen to customer sentiment using multiple methods, including social media channels — separating the noise from the actionable insight and routing the insight to the right place in the organization that can act on it.<sup>6</sup>

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**FIGURE 2** Customer Service Strategy Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer service management, vision, and strategy**

Our company’s brand drives our strategy in designing our customer service experiences so that they deliver consistent service across all locations and all customer-facing channels.

Our goals and metrics are aligned with and support our company’s brand proposition and overall customer experience strategy (e.g., if we differentiate ourselves by customer experiences that we deliver, our metrics include customer satisfaction metrics in addition to productivity metrics).

We define the specific goals and metrics to be achieved through our customer service strategies (e.g., increased productivity, consistency of response, improved customer satisfaction).

We know what we want to accomplish with our customer service strategy; all of our staff, especially those who interact with customers, clearly understand it.

We have a strategy in place to deliver a consistent customer experience across all locations and across all communication channels.

What we learn about our customers influences our business strategy.

**Average score**

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**FIGURE 2** Customer Service Strategy Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

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Poor	Below average	Average	Very good	Outstanding

**Voice of the customer (VoC) strategy**

Senior executives consistently interact with target customers so that they get direct feedback about customers’ experiences with our company; these execs lead the charge to provide superior customer experiences.

We have a systematic approach to gathering customer feedback, including a process to examine shifts in the perceptions that customers have of our company.

We have a systematic approach to gathering unsolicited customer opinions from social sites that we monitor, including a process to examine shifts in the perceptions that customers have of our company.

We have a systematic process to record, route, store, and track all customer feedback for our organization.

We have processes defined for closing the loop with customers who provide feedback.

**Average score**

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4 to 5



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## Redesign Business Processes

Customer service business process management is typically associated with agent and customer functions, including customer service applications, omnichannel communications, and field service. Evaluate each of these functional areas that are pertinent to your business model.

### Implement Case Management Best Practices

Consider the relevant capabilities that comprise case routing, logging, and resolution, including locating the right knowledge-base article needed to resolve a case. Also consider capabilities that monitor the quality of agent interactions, agent scheduling, and forecasting. Evaluate your capabilities compared with best practices for (see Figure 3):

- › **Case management for customer service.** This includes supporting customer service agents in creating incidents or cases with respect to a specific customer inquiry or request received over the communication channels that a company supports. Capabilities include process guidance, case routing, escalation workflows, and managing service-level agreements (SLAs).
- › **Agent desktop.** This includes capabilities to manage, assess, assign, and match customer requests received over the communication channels that a company supports with customer records. Capabilities also include prioritizing a customer's needs and matching those needs with customer service agents based on agents' skill sets and availability.<sup>7</sup>
- › **Agent-facing customer service knowledge base.** Knowledge-base capabilities comprise enabling agents to find the right content within a knowledge base to address a customer's service request using multiple knowledge retrieval methods, including search, browsing, and guided decision paths. Capabilities also include feedback loops to keep content in line with customer demand.
- › **Workforce optimization.** This includes capabilities to record agent interactions with customers, evaluate the quality of these interactions, recommend targeted training based on quality scores, manage agent schedules, and forecast future schedules for optimum productivity.

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**FIGURE 3** Case Management Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Case management for customer service**

We are able to create incidents (agent, user, system alert, email) and then take group skills and queues into account when assigning and routing incidents to agents.

We associate SLAs with incidents. If we’re in jeopardy of missing an SLA, the incident is escalated so that we can take the proper action.

We have different workflows and SLAs based on customer status and priority of the reported incident.

Customer service agents can quickly and easily review the products or services that the customer owns and their various histories while maintaining visibility into the customer’s name and basic details.

The service entitlements of a customer are clearly visible to customer service agents.

We have scripting capabilities to guide agents through the correct resolution processes.

We use process guidance to guide agents through complex customer service resolution processes. Process guidance presents the agents with a series of screens with all the necessary data elements that map to a step in a process. Agents must navigate through these screens to complete the process.

We have consistent case management processes for similar incidents that are escalated to our customer service organization via phone; text-based channels such as email, chat, and SMS; and social channels.

We have tools such as agent-to-agent chat that help agents collaborate with one another to resolve a customer issue and achieve high first-contact-resolution rates.

We have tools such as agent-to-knowledge-worker chat that help agents collaborate with enterprise resources to resolve a customer issue and achieve high first-contact-resolution rates.

**Average score**

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**FIGURE 3** Case Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Agent desktop**

We support blended agents — agents who provide service and support as well as manage orders and campaigns.

We have time-zone and language support for global agents.

We are able to effectively manage, assess, assign, and match cases to the customer’s record.

Agents have full access to all interactions and case history for customers across all communication channels the company supports, from traditional channels like phone and email to social channels like Twitter.

Agents can see whether they are meeting the SLAs for a case.

We can dynamically assign agents based on their skill level, availability, and areas of expertise.

We have systems that prevent unauthorized access to records and track changes to customer information.

We have insight into the types of customer service issues reported, customer interaction patterns, and employee productivity.

**Average score**

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**FIGURE 3** Case Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Agent-facing customer service knowledge base**

We have a knowledge base with up-to-date content that agents use to find answers to customer questions.

☐

We have content within the knowledge base to guide an agent through unfamiliar business processes during a call.

☐

Agents can use multiple retrieval methods to locate appropriate content in the knowledge base, like search, browse, clarifying questions, and guided decision paths.

☐

We are able to automatically generate and rank lists of frequently asked questions (FAQs).

☐

We are able to support knowledge base content in multiple languages.

☐

We can segment the viewing of knowledge base content by groups, both internally for our agent population and externally for our customers.

☐

The authoring environment we use to generate knowledge base content is flexible and can support custom authoring workflows.

☐

We reformulate the information viewed by agents and customers and add it to our knowledge management system so the search technology can retrieve it in this new and digestible form. (We don’t just put product manuals on a SharePoint site.)

☐

Our knowledge base tracks content that has been viewed and associates it with a customer record.

☐

Agents can give feedback on content as well as rate content and contributors.

☐

We have incentives in place to encourage agents to contribute new knowledge to the knowledge base.

☐

Our knowledge base answers include discussion threads from the (social) community; integrated search returns community discussions, blogs, or Q&As together with curated knowledge base answers.

☐

**Average score**

☐

FIGURE 3 Case Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Workforce optimization**

We record all interactions of agents across all communication channels that we support.	<input type="text"/>
We monitor and score the quality of customer interactions, and tie feedback to the agent profile.	<input type="text"/>
We are able to recommend agent training based on agent quality scores.	<input type="text"/>
We schedule our agents for maximum productivity and minimal downtimes or customer wait times.	<input type="text"/>
We are able to forecast agent schedules based on historical contact volume trends.	<input type="text"/>
Average score	<input type="text"/>

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
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**Implement Omnichannel Customer Service Best Practices**

Customers want to engage with customer service agents across many channels, including phone, email, chat, and web self-service, as well as social channels like peer-to-peer discussion forums, Facebook, and Twitter. Companies must provide consistent customer service experiences across these channels. In addition, customers must be able to start an interaction in one communication channel and continue it in another without having to restart the conversation.<sup>8</sup> Cross-channel integration is difficult to achieve and takes a solid architectural approach.<sup>9</sup> Assessing your capabilities in omnichannel communication management includes evaluating (see Figure 4):

- › **Communication channel strategy.** The communication channel mix must align with customer expectations and the company's brand proposition; these capabilities ensure that customers can successfully and satisfactorily complete their goals in any mix of communication channels.
- › **Web self-service.** This includes supporting customers in locating the right answers to their questions using web self-service knowledge management.
- › **Self-service to live-service transition.** This includes offering customers the option to escalate a request to a live agent from a web self-service site, including passing information to an agent when a session transitions from self-service to live service.
- › **Phone channel delivery.** This includes supporting phone agents in creating customer incidents or cases, routing incidents, handling inquiries within the guidelines for specific customers, and providing full computer-telephony integration (CTI) capabilities.
- › **Customer-to-agent chat and co-browse.** This includes providing interactive and proactive chat, co-browsing, and page push.
- › **Email response management.** This includes managing and responding to, in a consistent and efficient way, a high number of emails via agents. Capabilities include productivity tools such as canned answers, autosuggestions, and autoresponses, as well as accessing a knowledge base.
- › **Social.** The popularity of this channel is on a steady rise. These interactions can be found commonly through places such as Twitter and Facebook. When consumers reach out via social, they are expecting next-to-immediate resolutions. If they had time to be put on hold, they would dial a phone agent.<sup>10</sup>
- › **Discussion forums.** This includes forums for sharing information with peers, including participant registration and administration, integrating forums with knowledge bases, ranking and rewarding customer advocates, and seamless escalation to agent-assisted interactions.
- › **Mobile customer service.** This includes offering customers the ability to request service from a range of mobile devices. This means supporting common mobile customer service scenarios that leverage the unique capabilities of mobile devices, such as GPS and camera functions or multi-modal interactions. This also includes supporting a seamless escalation from a mobile self-service session to an agent-assisted interaction.

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- › **Omnichannel interactions.** This means ensuring that customers can accomplish their goals in any interaction channel and transfer from one channel to another. A director of social media at a large wireless carrier said it attempts to match social handles with the customer records in its customer relationship management (CRM) systems. Customer service teams must strive to eradicate the need to make customers repeat information when escalating interactions into a new channel.

**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding
<b>Communication channel strategy</b>				
Our communication channel strategy supports our brand. For example, if we compete on customer experience or if we target high-net-worth individuals, we focus on agent-assisted channels. If we compete on cost, we focus on delivering excellent self-service interactions.				
We analyze our customers’ channel preference on a regular basis and use that information to adapt our service channel offering mix.				
Our customers can complete their goals in any interaction channel that we support: phone, email, chat, SMS, forums, Twitter, Facebook, etc.				
We present our customers with a clear transition path to get from one interaction channel to another.				
We manage multiple interactions on the same topic across multiple channels as a single threaded interaction.				
The language, information, and interaction context is consistent across all interaction channels.				
Responses to customer interactions are the same across all communication channels; a customer can get a confirmation of her interaction in any channel.				
We combine metrics across all channels to provide a holistic view of the customer experience.				
<b>Average score</b>				

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**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Web self-service**

We have a customer-facing knowledge base as part of our web self-service offering.

Customer-facing content and agent-facing content is stored in the same knowledge base. We control the access to content based on role.

Customers can use multiple retrieval methods, like search, browse, clarifying questions, and guided decision paths, to locate appropriate content in the knowledge base.

Our customers can rate or comment on knowledge-base content.

**Average score**

**Self-service to live-service transition**

We allow our customers to request a callback if they are unable to find the information they need on our web self-service site.

We allow our customers to chat with us if they are unable to find the information they need on our web self-service site.

We allow our customers to email us if they are unable to find the information they need on our web self-service site.

We transfer the web self-service session history to an agent for web self-service sessions escalated to an agent.

**Average score**



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**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment (Cont.)

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**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Phone channel delivery**

We use an IVR to enable customers to access the information they need via voice self-service. Customers can opt out of the IVR and be connected to a live agent at any point in time.

Our routing engine provides intelligent call routing and queuing and prioritizes and balances call flow. We route calls based on customer needs and agent capabilities.

Our routing engine incorporates contextual information such as data from CRM, case management, and other enterprise data stores. We route calls using this information to provide individualized routing decisions for each customer.

We have implemented full CTI capabilities so that information from the caller, including previous call history, is transferred to the agent desktop (full screenpop) so that the customer does not have to repeat account numbers or other identifiers already typed into the keypad.

Our customer service application has robust and sophisticated mobile device capabilities, including support for laptops and/or browsers for handheld devices like BlackBerry, iPhone, Android, and Windows Mobile.

**Average score****Customer-to-agent chat and co-browse**

Customers can use chat to interact with our agents.

Agents can proactively engage customers using chat.

We tune our proactive chat rules to ensure that the right customers are targeted.

We optimize the placement of our chat links to ensure optimal customer engagement.

Agents can push specific pages to customers and use cobrowsing capabilities to work interactively with the customer (e.g., to fill out a complex form).

Our cobrowsing capabilities include security features such as masking of fields for the agent that are visible to the customer.

We associate and store chat transcripts with the customer record.

We log, associate, and store all interactions between an agent and a customer, such as page push and sharing, form filling, and remote control, in the customer record.

**Average score**

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**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Email response management**

Agents are able to manage and respond to high volumes of incoming email and can access a single companywide customer information database.	<input type="text"/>
A business process engine processes emails to ensure proper routing, assignments, message analysis, entitlement checking, and language identification.	<input type="text"/>
Email agents have access to a knowledge base of canned answers to quickly and effectively answer customer requests.	<input type="text"/>
Incoming emails are automatically acknowledged. The system can automatically suggest answers to emails to agents and automatically respond to answers without agent intervention.	<input type="text"/>
Prior customer email interactions on the same topic are managed as a single, threaded interaction, are stored within a customer history record, and are accessible when needed by a customer service agent.	<input type="text"/>
Our company has done voice of the customer (VoC) studies to know how quickly customers expect an email response; we track and communicate email SLAs and tell customers when they can expect an email response.	<input type="text"/>
We design our email interactions to deliver essential content, including repeating the customer’s question to maintain the context of the user’s question and provide a relevant response.	<input type="text"/>
We design our email interactions so that it is easy for a customer to respond and ask clarifying questions and have staff on hand to answer questions that require escalation to an expert.	<input type="text"/>
The email system is integrated into a unified agent dashboard.	<input type="text"/>
<b>Average score</b>	<input type="text"/>

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**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

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Poor	Below average	Average	Very good	Outstanding

**Discussion forums**

We support moderated discussion forums for customers.

Forum content is well-integrated with the knowledge base and problem diagnostic tools.

We have controls for participant registration/expert customer designation and a participant ranking system rewarding participants for interacting with other customers via relevance and other viewer comments.

If a customer cannot find an answer on a discussion forum, he can easily escalate to an agent interaction without having to repeat the question.

**Average score**

**Mobile customer service**

We allow our customers to request customer service via mobile devices.

Our customer service mobile applications are optimized to run on common mobile operating systems and devices.

Our mobile experience is not a carbon copy of our web experience. We support value-added scenarios that utilize native capabilities of mobile devices, such as cameras and GPS capabilities.

We allow customers to escalate from a mobile self-service session to an agent-assisted session. We pass session history to the agent so that the customer does not have to restart their conversation.

**Average score**

**Omnichannel interactions**

The language, information, and interaction context is consistent across all interaction channels.

Our customers are presented with a clear transition path from one interaction channel to another.

Responses to customer interactions are the same across all communication channels; a customer can get a confirmation of her interaction in any channel.

Multiple interactions on the same topic across multiple channels are managed as a single, threaded interaction.

**Average score**

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**FIGURE 4** Omnichannel Communication Capabilities Best Practice Self-Assessment (Cont.)

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4 to 5

## Leverage Technology Wisely

Great customer service experiences are the result of highly motivated and skilled front-line employees working within well-designed business processes and supported by the appropriate technologies. The customer service assessment for AD&D professionals should include a review of best practices in the areas of customer analytics and feedback, data management, and technology infrastructure.

### Implement Customer Analytics And Feedback Best Practices

Customer service analytics includes all of the technology that analyzes data on an organization's ability to effectively deliver customer service, allowing it to make decisions quickly and efficiently. Assess your ability to use data to deliver excellent customer service using the following categories of capabilities (see Figure 5):

- › **Customer information analysis tools.** This includes understanding ad hoc querying and online analytical processing (OLAP) analysis, as well as using predictive analytics to help guide agents' next best actions for a contextual, personalized customer service experience.
- › **Customer service information reporting and analysis.** This includes leveraging technology and processes, including prebuilt reports, report design tools, and report publishing methods. In your self-assessment, consider the best practices for key performance indicator (KPI) tracking and dashboards for management decision-making.
- › **Customer service information business activity monitoring tools.** This includes using tools that support event collection, filtering, and transformation for monitoring operations and alerting users to key exceptions in customer service delivery.
- › **Customer feedback.** This includes collecting, analyzing, and acting upon feedback received via both traditional omnichannel survey tools and social listening platforms.

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**FIGURE 5** Customer Analytics And Feedback Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer information analysis tools**

We use prebuilt analytics applications that combine customer service data with relevant information across the enterprise (e.g., current open sales opportunities).

We use predictive analytics to support decision-making.

We are able to do ad hoc query analysis.

We have tools that use real-time analytics to support personalization and help guide an agent’s next best action, like offer optimization.

We can run advanced online analytical processing (OLAP) analysis of customer data.

**Average score**

**Customer service information reporting and analysis**

We have full reporting capabilities for customer service information, including custom and built-in reports and personalized dashboards across all the interaction channels we support.

We use tools with strong, flexible, and easy-to-use customer information report design capabilities.

We have multiple delivery options for customer service information reports.

Our customer analytics tools use built-in best-practice customer management key performance indicators (KPIs).

We are able to drill down to the underlying action from any report element or KPI.

We have the capability to undertake analysis of unstructured social content like blogs, community posts, customer product reviews, and customer emails.

**Average score**

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**FIGURE 5** Customer Analytics And Feedback Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer service information business activity monitoring tools**

We have tools that support event collection, filtering, and transformation for monitoring operations in real time and alerting users to key exceptions in the business process.

We have predefined, process-focused dashboards for real-time monitoring of operations.

**Average score**

**Customer feedback**

We survey our customers after every service interaction using the communication channel they used to interact with us. We have feedback loops in place to address comments and concerns.

We associate feedback received from customers to their customer record.

We collect feedback by communication channel and compare customer satisfaction scores across communication channels. We use this data to address deficiencies in our communication channel strategy.

We use analytics to see where customers opt out of a self-service interaction. We have feedback loops in place to address issues with our self-service capabilities.

We monitor customer sentiment on social media sites. We have feedback loops in place to address comments and concerns.

**Average score**

What it means	Score
	Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1-2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3-3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4-5

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**Implement Customer Data Management Best Practices**

Your organization is making decisions with customer data, so it's imperative that the data is accurate. This requires gaining a single view of the customer, making customer data more available, and ensuring that you implement the best in customer data protection and privacy to avoid compliance, legal, and public relations nightmares — not to mention degradation of your brand and customer trust (see Figure 6). Evaluate your company using the following categories:

- › **Customer profile information.** This includes collecting, associating, and organizing information about customers while also defining the right customer information that a firm should aggregate and how to integrate it across the organization.
- › **Customer data availability.** This includes providing customer service agents with access to the appropriate customer-level information to ensure a personalized and effective service experience.
- › **Customer data accuracy.** Damien Dellala, a former director of digital customer intelligence for a major Australian bank broke it down to “Data has become organizations’ digital currency.” This entails ensuring that master information is consistent in all customer repositories and that processes exist to correct inaccurate data. This includes providing the contact center with access to appropriate customer-level information to properly serve customer needs in a timely manner.<sup>11</sup>
- › **Customer data privacy.** This includes making customer data available only on the basis of well-defined privacy guidelines that are broadly communicated to customers and everyone in the customer service organization.<sup>12</sup>

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**FIGURE 6** Customer Data Management Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer profile information**

We have a clear definition of the customer information — account, product, and purchase information — we need to collect and analyze to support our customer service strategy.

We have a single view of the customer across all systems and communication channels.

We have the capability to enrich customer profiles by appending third-party data.

We have the ability to enrich customer profiles by appending data derived from social media, blogs, wikis, and customer communities.

**Average score****Customer data availability**

All of our customer information/data is available in real time.

Personnel have appropriate access to the customer information needed to properly serve customer needs.

Users of customer data consider it to be easy to find, accurate, and current.

We have the capabilities to adequately maintain our customer data processes and infrastructure.

**Average score****Customer data accuracy**

Customer master information is consistent in all customer repositories.

We have a process to correct inaccurate data.

**Average score**



FIGURE 6 Customer Data Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer data privacy**

Our customer data is accessible by relevant personnel, subject to applicable privacy guidelines.	<input type="text"/>
We have assessed the legal issues around customer data that could affect how we manage our customer management programs in various local markets.	<input type="text"/>
Our customer support personnel understand and follow customer data privacy policies.	<input type="text"/>
Average score	<input type="text"/>

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4 to 5

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**Implement Technology Infrastructure Best Practices**

Technology infrastructure best practices involve managing customer service applications, building a sound technology infrastructure, maintaining system availability and reliability, and using sound project management practices (see Figure 7).<sup>13</sup> Evaluate your capabilities compared with best practices for:

- › **Customer service applications.** This includes selecting or building customer service applications that are intuitive, easy to use, configurable, and scalable and that can guide agents through steps in the customer service process.
- › **Network infrastructure.** This includes ensuring that hardware is adequately scaled for quick response times and that the telecommunications infrastructure is consistent across customer service centers to minimize latency.
- › **Customer service application availability and reliability.** This includes deploying technology architecture and processes to ensure that systems are highly available and have backup and failover capabilities; it also includes ensuring that a sound disaster recovery plan is in place.
- › **Technology program and project management.** This includes ensuring that there is a clear fit between technology programs and projects and the organization's customer service goals, including program management structures for allocating resources and tracking progress toward objectives.

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**FIGURE 7** Technology Infrastructure Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer service applications**

Our customer service applications have an intuitive look, feel, and navigation to minimize the need for training for both advanced and new users.

Our customer service applications are highly configurable.

Our customer service applications are configured to run on mobile devices.

Our customer service applications are single sign-on.

Our customer service applications are highly scalable.

Our customer service applications can guide users through scripts or process flows.

Our customer service applications have strong workflow capability.

Our customer service applications support open technology standards and provide tools for integrating with other applications and third-party providers.

**Average score****Network infrastructure**

Our network infrastructure is highly available and reliable.

Our hardware is adequate to support application functionalities.

Desktop devices are fully adequate to support the requirements of front-line personnel to sell to and serve customers.

**Average score****Customer service application availability and reliability**

We have backup and failover capabilities to ensure that customer service operations are uninterrupted in the event of an outage.

We have an up-to-date disaster recovery plan.

**Average score**

FIGURE 7 Technology Infrastructure Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

Technology program and project management

Our program and project management structures establish appropriate priorities and build consensus around the activities critical to realizing our CRM strategy.	<input type="text"/>
Our implementation protocols allow iterative and scalable solution deployments and can be measured at each stage.	<input type="text"/>
We have a formal program management process that tracks and evaluates progress toward our customer management goals.	<input type="text"/>
Average score	<input type="text"/>

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4 to 5

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## Inspire A Customer-Centric Culture

Supporting employee management and motivation and reducing attrition is the most overlooked category of business practices that will empower or undermine customer service initiatives. Pay attention to the culture within your customer service organization and your leadership practices, collaboration methods, training programs, and performance measurement approaches (see Figure 8).<sup>14</sup> Assess your capabilities in the following categories:

- › **Customer-oriented culture.** This includes fostering an attitude among employees that customers are important by incorporating customer care and the overall company philosophy into the customer service organization. Companies should also strive to use customer-oriented, rather than product-oriented, organizational structures, and they should ensure that their customer service operations align well with their company's customer experience strategy.
- › **Leadership.** This includes demonstrating the commitment of top management to customer-facing improvement initiatives, providing adequate resources, and communicating an aligned customer management strategy to all involved workgroups.
- › **Inter- and intra-organizational collaboration.** This includes working cooperatively across organizational boundaries to serve customers in a consistent manner.
- › **Stakeholder support and management.** This includes gaining the necessary support from both executive leadership and end users for new customer service solutions and tools. It also involves ensuring that business users are deeply involved in the process of transforming customer-facing processes and adopting new tools.
- › **Business-technology management collaboration.** This includes reducing the barriers between technology management and business managers by creating organizational structures that integrate technology management with the business, hosting regular meetings to enhance collaboration, and offering technical support that provides rapid redress for issues.
- › **Hiring and training.** This includes hiring appropriately skilled customer service personnel based on the needed skill set as well as supporting the initial training and ongoing development of skills that allow customer service personnel to effectively serve and interact with customers. One way to do this is by creating a working environment with well-defined customer service processes, closely monitoring the quality of interactions, enabling a culture of active coaching, and providing access to targeted training based on quality scores.
- › **Performance measurement.** This includes ensuring that performance goals are well articulated and the performance measurement process is closely linked to improving customer relationships.

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**FIGURE 8** People Management Capabilities Best Practice Self-Assessment

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer-oriented culture**

Customer care is an integral part of our philosophy and culture.

Our organizational structure is customer-focused, not product-focused.

Our customer service governance model is well aligned with our company’s customer experience strategy.

**Average score**

**Leadership**

We have C-level commitment to ensure accountability, facilitate internal/external communications, authorize funding, and align the organization to support our customer service management strategy.

We have full support across all levels of management for our customer service initiatives.

Adequate funding is available to support investment in improving our customer service capabilities.

**Average score**

**Inter- and intra-organizational collaboration**

The relationships between the different groups within our organization are open and collaborative, not adversarial.

Functional organizations within our company effectively share relevant customer data.

**Average score**

**Stakeholder support and management**

Business users are intimately involved in the process of transforming customer-facing processes and tools.

We consistently use metrics, rewards, and incentives to focus people on increasing customer relevance and value.

**Average score**

**Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service**

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**FIGURE 8** People Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Customer-oriented culture**

Customer care is an integral part of our philosophy and culture.

Our organizational structure is customer-focused, not product-focused.

Our customer service governance model is well aligned with our company’s customer experience strategy.

**Average score**

**Leadership**

We have C-level commitment to ensure accountability, facilitate internal/external communications, authorize funding, and align the organization to support our customer service management strategy.

We have full support across all levels of management for our customer service initiatives.

Adequate funding is available to support investment in improving our customer service capabilities.

**Average score**

**Inter- and intra-organizational collaboration**

The relationships between the different groups within our organization are open and collaborative, not adversarial.

Functional organizations within our company effectively share relevant customer data.

**Average score**

**Stakeholder support and management**

Business users are intimately involved in the process of transforming customer-facing processes and tools.

We consistently use metrics, rewards, and incentives to focus people on increasing customer relevance and value.

**Average score**

FIGURE 8 People Management Capabilities Best Practice Self-Assessment (Cont.)

 The spreadsheet associated with this figure is interactive.

**“Please score your company’s performance relative to each of the capability statements according to the following scale.”**

1	2	3	4	5
Poor	Below average	Average	Very good	Outstanding

**Performance measurement**

We have defined competency models and criteria for all key customer service employees. We actively monitor the quality of their interactions with customers and compare them to our competency models.	<input type="text"/>
Our performance measurement process is linked closely to improving our customer relationships.	<input type="text"/>
Our customer service staff have a common understanding of agent, supervisor, and center metrics.	<input type="text"/>
Our staff receive quantitative and qualitative customer feedback on a regular basis.	<input type="text"/>
Average score	<input type="text"/>

What it means	Score Average of scale from 1 (Poor) to 5 (Outstanding)
Little use of best practices is evident. Odds of success are low.	1 to 2.9
Some use of strategy and alignment with best practices. Improvement opportunities are evident in some areas.	3 to 3.9
Strong capabilities and use of strategy and alignment with best practices. Chances of success are high.	4 to 5

Take Action Now

How can make your company’s customer service stand out? Begin with Forrester’s Best Practices Framework For Customer Service to assess your current capabilities. Download the self-assessment tool.<sup>15</sup> Distribute the spreadsheet to your team and score your company against customer service best practices. Based on the results, identify the top 10 customer service capabilities most in need of innovation during the next 12 months. Build an action plan to strengthen these capabilities and agree on metrics to measure success. Consult the Forrester Wave™ evaluation of customer service software solutions to evaluate which vendors can best support your customer service innovation plan.<sup>16</sup>



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**Recommendations**

## Capitalize On The Best Practices Framework For Customer Service

Forrester's Best Practices Framework For Customer Service is a powerful tool for organizations embarking on assessing and transforming customer service or for jump-starting a new initiative. AD&D professionals, don't make the mistake of just perusing the self-assessment; use it as the basis for an active dialogue about customer service. How?

- › **Take it.** Everyone involved in customer experience, customer service, the contact center, eService, marketing, sales, technology management, and CRM transformation — plus C-level executives — should complete the self-assessment to develop their personal view of the company's current capability to serve customers.
- › **Compare it.** Teams should share their individual results and identify any major differences. Why is this valuable? Because if you don't identify these differences of opinion early in the process, they will exacerbate alignment challenges down the road and cause various groups to dig their heels in to maintain their position.
- › **Discuss it.** Use the results — both similarities and differences — as the basis for active discussions about priorities. Where should the company focus its efforts and why? Identify goals, objectives, and expected ROI.
- › **Improve it.** Transforming customer service represents a significant change for most companies. Use the results of the customer service best practices assessment to create a phased implementation plan. And to make sure initiatives stay true to their original intent, use Forrester's Best Practices For Customer Service Framework as a guide, always asking, "Are we really improving our customers' experiences and providing what they need and want — from their perspective, not ours?"

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## Supplemental Material

### Survey Methodology

Forrester's Business Technographics® Global Priorities And Journey Survey, 2015, was fielded to 14,596 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Business Technographics and was fielded from December 2014 to March 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Business Technographics fields business-to-business technology studies in 10 countries spanning North America, Latin America, Europe, and Asia Pacific. For quality control, we carefully screen respondents according to job title and function. Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

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## Endnotes

- <sup>1</sup> Source: Forrester's Business Technographics Priorities And Journey Survey, 2015.
- <sup>2</sup> Forrester studied 165 executives in charge of enterprisewide customer experience to create a composite profile of this relatively new position within companies. The chief customer officers (CCOs) we investigated tend to be senior leaders hired internally and are as likely to come from the operations side of the company as from marketing. They typically oversee one of three types of organizational structures: advisory, matrixed, or operational. Firms considering instituting a CCO role at their company should consider their culture, objectives, and customer experience maturity in determining the most appropriate model. See the ["Three Organizational Models For Chief Customer Officers"](#) Forrester report.
- <sup>3</sup> Source: Forrester's Business Technographics Priorities And Journey Survey, 2015.
- <sup>4</sup> In a survey of US online adults who have used any customer service methods in the past 12 months, 55% of respondents agreed with the statement "I am very likely to abandon my online purchase if I cannot find a quick answer to my questions," and three-quarters agree that "Valuing my time is the most important thing a company can do to provide me with good online customer service." Source: Forrester's North American Consumer Technographics Customer Experience Survey, 2013.
- <sup>5</sup> To download the full self-assessment workbook, see the ["Forrester's Best Practices Framework For Customer Service Self-Assessment"](#) Forrester report.
- <sup>6</sup> Structured surveys are the mainstay of customer experience (CX) and voice of the customer measurement programs. Despite their advantages, surveys fall short in ways that can leave gaps in the insight that customer service professionals need or even mislead CX efforts altogether. See the ["Beyond Surveys: New Tools For More Effective CX Measurement"](#) Forrester report.
- <sup>7</sup> Contact center agents can have a huge impact on customer experience. Unhappy contact center agents equals unhappy customers. It's that simple. What is less straightforward is how application development and delivery (AD&D) professionals can determine how happy and engaged the agents actually feel. If they can successfully uncover what sort of experiences agents have, AD&D pros must then create technology scenarios that help improve those experiences. This report provides contact center pros with methods for measuring the agent experience by asking the right questions and points to technologies that help improve that experience. See the ["How To Measure And Improve The Contact Center Agent Experience"](#) Forrester report.
- <sup>8</sup> Competitive pressures are forcing both business-to-business and business-to-consumer organizations to maximize every customer interaction, in terms of customer satisfaction and cost control. To successfully address these challenges, customer service leaders must identify what proportion of their overall customer service interactions fall into the categories of low, medium, and high complexity. This information will help prioritize new customer service channel selection and estimate the potential deflection volumes from current customer service channels. Integration among channels, common underlying workflows and business rules, and seamless transitions between contact media is needed to maintain a unified experience across all communication channels supported. See the ["Trends 2015: The Future Of Customer Service"](#) Forrester report.
- <sup>9</sup> AD&D pros must design and deploy contact center technology integrations to support cross-channel interactions. See the ["Connect The Dots Between Customer Self-Service And Contact Centers"](#) Forrester report.
- <sup>10</sup> AD&D professionals supporting contact centers, in a race to develop applications in the age of the customer, view social customer service warily. On the one hand, they recognize that younger customers want service via social channels. On the other hand, they fear that social upends all their well-developed workforce optimization tools and processes for customer service. This report details the metrics, forecasting, and quality monitoring processes and tools that AD&D pros will need to adapt for social customer care. See the ["Brief: Adapt — Don't Scrap — Your Workforce Optimization Tools To Support Social Customer Service"](#) Forrester report.

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- <sup>11</sup> To serve and delight empowered customers, organizations are embarking on digital transformation journeys from multiple directions. Many start with initiatives to improve digital marketing capabilities like search, mobility, and social. Others begin by focusing on the digital delivery of existing products, services, and processes to improve efficiency and operational performance. Finally, those with the very strongest of stomachs may target enterprisewide digital strategies to simplify products and streamline processes to improve the overall customer experience. A consistent requirement across all of these digital initiatives is the need to effectively transform the available data into more meaningful customer insights. This report highlights key lessons learned from Asia Pacific-based organizations successfully leveraging customer insights to fuel their digital initiatives. Customer insights professionals can use these lessons to optimize their customer analytics strategies and ensure their company's digital initiatives are supported by meaningful customer insight and actionable understanding. See the "[Brief: Applying Customer Insight To Your Digital Strategy](#)" Forrester report.
- <sup>12</sup> Protecting enterprisewide data remains an elusive goal for chief information security officers (CISOs). Software-as-a-service (SaaS), web 2.0 technologies, and consumerized hardware increase the number of escape routes for sensitive information. Countries have specific data privacy regulations that must be followed. See the "[Forrester's 2014 Data Privacy Heat Map](#)" Forrester report.
- <sup>13</sup> Delivering a differentiated customer experience requires that you have the right technologies, business processes, and empowered organizational structures to support your organization's customer service capabilities. When choosing customer service technologies, AD&D pros leading customer service projects should move away from a build-first mentality. Instead, they should consider whether technologies they can leverage for customer service already exist within the enterprise. If not, they can look at outsourcing options, CRM suites, or specialty customer service point-solutions vendors. See the "[Choose The Right Customer Service Solution For Your Business](#)" Forrester report.
- <sup>14</sup> To quote Yogi Berra, "If you don't know where you are going, you'll end up someplace else." Today's contact centers are not lacking a large quantity of data about their performance, especially now that many capture more extensive feedback directly from customers. Technological advances in speech and text analytics have added another rich source of data about agent interactions with customers, but can become another island of information. The perennial issues are how to best use this data, turn it into actionable information, and drive continuous improvement. This report describes how better-managed contact center data results in better customer service. See the "[Refine The Source Of Truth In Your Contact Center To Drive Better Performance](#)" Forrester report.
- <sup>15</sup> To download the full self-assessment workbook, see the "[Forrester's Best Practices Framework For Customer Service Self-Assessment](#)" Forrester report.
- <sup>16</sup> Forrester evaluated the customer service and support capabilities of 11 leading customer service solutions for large enterprise and 11 customer service solutions for small and midsize teams against 84 criteria. Customer service and application development and delivery professionals face a diverse range of products to sift through to support the quest to create differentiated customer experiences and build stronger bonds of buyer loyalty. To begin an evaluation of vendors that can support your customer service innovation plan, see the "[The Forrester Wave™: Customer Service Solutions For Enterprise Organizations, Q2 2014](#)" Forrester report and see the "[The Forrester Wave™: Customer Service Solutions For Small And Midsize Teams, Q2 2014](#)" Forrester report.

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