Building the Next Generation Contact Center
Executive Summary

Welcome to the next generation of customer service: Customer communication preferences have evolved, technology is everywhere, CRM has matured and mobile is prevalent. Perhaps most importantly, the customers themselves have changed, becoming more connected, informed and empowered than ever.

Today, the tables have turned and these customers are now defining the interaction model. If your business doesn’t serve customers on their terms – including where, when and how they want to engage – they will take their business elsewhere.

To meet these rising customer demands and maintain customer loyalty and retention, contact centers must continue to improve technical capabilities, agent productivity and customer satisfaction. Making these improvements a reality requires focusing on three key initiatives:

1. Creating an effortless customer service experience
2. Providing proactive and preemptive engagement
3. Optimizing service delivery and making the entire process more productive

This paper will explore why these three areas of focus are so important for meeting today's heightened customer demands as well as how building a next generation contact center can help you deliver on these initiatives.
Effortless Customer Service

Customers' most frequent post-sale interactions with your business are with customer service. How easy and enjoyable you make those interactions directly impacts customer loyalty. To provide truly effortless service and reduce any friction, the next generation contact center must embrace omnichannel and self-service capabilities.

Go Omnichannel With Service

Omnichannel service creates a continued, integrated, effortless and seamless experience across all channels.

Customers have preferred means of getting help, and these preferences may vary based on specific needs. For example, users may choose SMS to find out a simple answer like a bill balance, while they prefer real-time phone or video support for more hands-on help like troubleshooting the living room TV. Today's contact center must support these multi-channel needs in order to satisfy customer expectations.

To create a truly effortless experience, you need to take this multi-channel service a step further and go omnichannel. Omnichannel service allows customers to start an engagement on one channel and transition seamlessly to another channel. For example, insurance customers might use the phone to get in touch with an agent about a quote and then continue the engagement online by filling out an application and submitting documents. Enabling this seamless integration takes your service capabilities to the next level and makes the engagement as convenient and easy as possible for customers.

Of course, powering both a multi- and omnichannel service environment requires your contact center to operate on a variety of channels, including phone, web, chat, mobile, social and anywhere else your customers may want to engage.

Enable Self-Service

According to independent analyst Forrester Research, Inc., "web self-service was the most widely used communication channel for customer service" in 2015.¹ Forrester analyst Kate Leggett predicts that this demand for self-service (on both web and mobile channels) will only increase in 2015 and beyond.²

This trend indicates that today's connected customers want to avoid contacting a support agent whenever possible. Instead, they prefer to resolve problems on their own with help from documentation, a knowledge base or the community. As a result, it's important to provide not only web self-service capabilities, but also mobile self-service capabilities so that customers have the freedom to efficiently resolve issues from anywhere at any time.

Powering the Effortless Service Experience

As customers define how they want to interact with your business, the hallmark of a next generation contact center is the ability to listen and proactively enhance channels based on these demands. Today, this requires providing service capabilities (including self-service) across a variety of channels, including mobile, video, chat and web. You also need to make it seamless for customers to switch from one of these channels to another in order to make engaging and receiving support as effortless as possible.

Fortunately, Salesforce® provides a variety of leading solutions that can help bring this vision to life. To start, Salesforce Service Cloud® offers leading edge multi-channel capabilities to seamlessly meet customer preferences on traditional channels like phone, email and web as well as emerging channels like chat, social (Facebook, Twitter, Google+, etc.) and video.

Beyond Service Cloud, Salesforce also offers innovative solutions through its Community Cloud and SOS tools.

Salesforce Community Cloud brings together self-service capabilities such as cases, knowledge base and a forum in a user-friendly and secure environment. These communities are also mobile-ready via responsive design, making it easy to provide customers with a similar experience regardless of which channel they're using. Meanwhile, Salesforce SOS is leading the charge for innovation by making mobile video support possible.

As you expand your channel options, it's increasingly important to maintain a single, comprehensive view of customers. Once again, Salesforce makes this possible. Salesforce Service Console makes it easy to manage the omnichannel experience with Case Feeds, which allow agents to manage and respond to incidents across all engagement channels from a single interface. The Service Console provides agents with a contextual 360-degree view of customer preferences, products and other relevant information to more successfully help customers.

Finally, Salesforce Presence makes it easy to manage all of this contact center activity by optimizing agent workloads across multiple channels by setting priorities, capacity and availability.

Proactive and Preemptive Engagement

The next generation contact center will also take service to the next level by proactively anticipating customer needs to deliver the right content to the right person at the right time and by harvesting data from connected devices to pre-empt issues from occurring. All of this starts with knowing who your customers are – including their purchase histories and preferences – and, in this new age of the Internet of Things (IoT), gathering information from connected devices. This knowledge can help you anticipate customers' needs and even solve their problems preemptively.

Anticipate Customer Needs

Truly understanding your customers and their behavior can help you deliver a higher quality of service. This high quality service should in turn lead to a better customer experience and increased customer satisfaction and loyalty.
Proactive service is all about anticipating what problems customers may experience in order to deliver the right content to the right customer at the right time. This content includes help resources, tailored offers, product recommendations and advice about next best actions based on each customer's individual profile.

For example, mobile service providers have made it a common practice to proactively notify their customers via text messages when they are close to their data limits to help them avoid extra charges and offer service plan upgrades. Customers truly value this type of proactive service because it typically saves them time and money. This not only leads to greater customer satisfaction, but can also deliver similar savings for your business.

Again, recognizing your customers is the first step here. Once you do that, you can use tools and analytics to drive business intelligence and determine factors like typical problems in a sale or product, customer sentiment and ideal promotions and offers to share. To be most effective, you need to proactively deliver this service across all channels and device types.

**Address Problems Before They Occur**

As more and more connected devices enter the market, the IoT will also enable preemptive service. Specifically, data and analysis from connected devices will speed time to resolution by preemptively diagnosing and fixing issues or preventing costly critical failures.

The next generation contact center will connect CRM systems with devices to provide agents with real-time insight into device status and operation so that they have all the information they need to quickly diagnose and resolve issues. Diagnostics and status alerts can also help agents take the right action to prevent device downtime before it even becomes an issue.

Adopting field service capabilities can also help the next generation contact center manage this IoT environment by enabling more effective field servicing of these devices. Having data about a machine state or failure codes can help the contact center send the most appropriate resource (e.g. someone who is trained on the device and has the right tools or parts needed) to deliver the required service. Field service software capabilities such as predictive maintenance, inventory management and dispatching can further maximize device uptime.

**Introducing Proactive Customer Engagement**

To make this type of proactive and preemptive customer engagement a reality, your contact center needs to know not only who your customers are, but also their sentiment and preferences. Further, the contact center needs to have connected device data tied into the CRM system so that agents can take actionable steps to address issues before they become critical.

Salesforce Service Cloud once again offers a number of different solutions, including Communities, Service Console and Analytics, to achieve these goals.

To start, Salesforce Communities are a great way to offer personalized communication that is contextualized based on users' profiles and the activities they perform. When users log in to the community, you can proactively present them with guided content, for example solutions and marketing information that is relevant to them.

The Service Console, which includes Salesforce Knowledge as well as actionable information and insights, can help agents deliver better service by acting as a control center and providing everything they need to know about a customer, such as recent cases, purchase history and contract and entitlement information. By putting all of the tools that agents need to manage customer interactions right at their fingertips, the Service Console makes it simple to provide personalized, proactive service.

Finally, Salesforce Analytics can process IoT information and drive action through case lifecycle automation in order to lead preemptive service initiatives. Data analytics can also help determine customer sentiment and best offers to help agents identify what, why, when and how to make proactive offers and suggestions to customers.

**Optimized and Productive Service Delivery**

Improving service capabilities to better meet customer demands means that the contact center must continue to innovate, optimize delivery and improve productivity. Improving the agent experience by providing effective tools and meaningful analytics will help contact centers rise to the challenge and take service to the next level.

**Focus on Internal Processes First**

Although the end goal of the next generation contact center is to improve the customer experience, you must first focus on improving internal processes in order to lay the groundwork for achieving this goal.

Even if you have the most innovative, easy to use customer service tools in place, they won't benefit customers unless the internal processes that power those tools are optimized. This optimization includes making it simple for agents to manage multiple service channels intelligently. It also includes helping agents easily collaborate and work productively so that they can better connect with each other and with customers to provide the most efficient service possible.

**Empowering Service Agents With Modern Solutions**

To lay this groundwork for your next generation contact center, you not only need to provide modern solutions for your agents, but you also need to communicate the value of these solutions in order to boost adoption.

From a solution perspective, Salesforce Service Cloud is a great place to start. Service Cloud provides the modern capabilities to optimize all contact center operations from omnichannel service and self-service requirements needed to meet customer expectations to the Service Cloud workbench and analytics needed to power and optimize the contact center. The Service Cloud Console should act as agents' mission-control, unifying the agent experience across channels and providing the contextual information agents need to provide high quality and efficient service.
To create the most optimal agent experience, you can equip the Service Console with relevant knowledge. Introducing a knowledge-centered support foundation with information embedded in case workflows is a proven best practice that benefits both agents and customers by enabling agents to solve issues quickly and correctly the first time around. You can also improve efficiency by adding Macros to the Service Console to automate common agent tasks and promote best practices across the contact center.

From an adoption perspective, implementing gamification and powerful analytics can provide the real-time insights needed to drive improvements at the individual level and across the entire contact center.

Conclusion

The customer service environment is changing. Regardless of your industry, company size, the type of service your customers require or any other factors, new technology has impacted customer expectations and your contact center must adapt in order to meet these new demands.
Resources
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