The Nine Steps on the Journey to Becoming a Modern Service Organization
The greatest challenge for customer service and support organizations today is making sure that they can see and serve customers across all engagement channels—both traditional and new.

Service organizations are evolving from dated, cost-hindered, reactive lines of business to strategic modern organizations that are at the forefront of a unified experience strategy. This evolution contributes to the growth and profitability of the business by attracting new customers, while satisfying existing ones and nurturing close customer relationships that power the journey to becoming a modern service organization.

Businesses must embrace this modernization as an “evolution”, and not approach it like a “revolution.” It’s not enough for just the brave few to make a huge leap of faith. The bridge you build to the new World of Modern must be one that everyone can cross. If you race ahead, as most try to do, you won’t get the returns or the sustainability you want to see from your investments.

To be successful, you need to understand that “change” is a behavioral shift influenced by thinking, and that “technology” can be seen as building blocks that need stacking in the right way. To get the right results, you must measure the right things.

Oracle has developed a Roadmap to Modern Customer Service to help you navigate this journey through three logical and easily traceable phases of maturity. Below is a nine-step view that showcases these stages. Steps one through three align you to a multichannel phase, steps four through six show you how to become cross channel, and steps seven through nine empower you to put an effective retention strategy in place.
1 Empower Easy Self-Service

- Many businesses leverage FAQs on their website for customers to access. However, all too often they are posted as static content, are not updated regularly, have no central ownership, have no consolidated access point for customers or agents to find them, and are siloed from any other channel. Inconsistent, outdated answers on the web will drive your customers towards higher-cost channels like the phone, instead of keeping them away from them.

- Identifying, capturing, centralizing, and publishing this content into a unified knowledgebase, and maintaining it, provides the highest returns to your business’s efficiency across all channels. Self-service FAQs are also one of the lowest-cost approaches for handling the highly repetitive yet low-value engagements that saturate high-cost, high-touch channels like phone and chat.

- For customers who like to self-serve on any device, self-service FAQ content that is managed through a centralized knowledgebase and published to the website streamlines responses and effectiveness through agent-assisted channels like phone, email, and chat. In addition, it can optimize your global service efforts and reduce costs around translation workflows for content that needs to be authored and maintained in multiple languages.
Provide Multiple Choices

• Your customer is connected at home, on the go, at work and on vacation, and expects to have the choice of how they want to connect with you. Each siloed engagement channel needs deployment, configuration, maintenance (routing, queuing, responding), and skilled resources. In addition to capturing, accessing, and writing its own customer data.

• Providing customers with multiple channels of engagement helps your business to balance and rebalance volumes across different channels—reducing the risk of having saturated volumes of low-value, high-cost engagements on a single channel such as the phone. Having multiple engagement channels also provides second and third level defenses should you experience a channel outage, or need to reduce the availability of a channel (such as chat). Published FAQ content to the “web channel” through a knowledgebase should be available on every channel your customer wants to connect with you on (chat, social, SMS, mobile, web...).

• The efficiency gains from solutions that provide a unified approach to the business logic, configuration, content, and administration can be critical if you are to reach the objectives of this phase. Even if the unification is limited to your current online engagement channels, you should consider extensible unified online engagement platforms that connect all digital channels, but preserve your phone-channel platform. If you fail to take a unified approach, your cost of service can increase dramatically due to the redundant overhead.
Empower Easy

Self-Service

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Most customer service and support organizations are working with limited access to the people who have the answers. Such people are typically a pool of skilled knowledge workers who face restrictions in disseminating their knowledge due to very constraining publishing policies driven by legal, governance, and compliance. No matter how streamlined your processes are for identifying, capturing, authoring, reviewing, approving, and publishing that knowledge, keeping up with the pace of change can be tricky. To make matters worse, customers rapidly abandon stale engagement channels and escalate to more expensive ones in a frustrated state—and a frustrated customer becomes ten times more costly to serve.

Create a private community on your website that can seamlessly blend into existing communities that customers use (like Facebook). A support-oriented community connects customers to each other, captures what they know, what they want, and what they say.

Social communities provide the lowest-cost resolution channel, as most customers and partners will share what they know for the simple satisfaction of feeling that they are helping others like them—even if it’s through a simple “like” or “rate” action. In addition to the productivity gains from leveraging resources across your ecosystem, it also helps you build more trusted relationships through authentic and meaningful engagements in preparation for your retention strategy.
4 Standardize Service

- By leveraging a cloud-based platform, businesses can rapidly deploy, configure, maintain, and extend the systems to meet the needs of each agent, group of agents, available channel, workflow/routing, and business group without the heavy lift of ongoing IT requests.

- The problem with many systems for communications and many types of communication styles is one of fragmented, disjointed, inconsistent, and irrelevant customer engagements, which can have a negative impact on the agents—and on the customers’ experience. Agents capable of traversing all the systems and communication styles are extremely inefficient in their workflow and are not scalable to meet the volume demands of all channel engagements. This results in long hold/response times and lengthening resolution times, and this quickly burns out your most valuable service talent.

- It’s necessary to empower agents with a complete customer-engagement platform for all channels. One that delivers a unified cross-channel agent desktop; allows them to have one place to log in as well as have a single view of the customer. Additionally, the platform will enable and guide the communication flow between channels, and ensure that the same quality of service is delivered by even newly trained tier-one agents, field customer service agents, and third-party/overflow contact centers.
Innovate New Engagements

- Customer service and support is typically at the tail end of customer engagement innovations. At best, this is an afterthought, where a simple link or contact instructions are provided, and usually service and support departments are not included at all. After taking the plunge to adopt innovative new services, customers are forced to disconnect from the experience and switch channels in order to engage with service. What’s worse is that the innovations are often placed in siloed systems, leaving the experience data in a vacuum where it can’t be utilized by anyone.

- Whether it’s during a field engagement, in a website redesign, in a new mobile app, on an interactive display, on an ATM, in a new social advertising campaign or in a layout design for a store, businesses need to design with customer service and support at the forefront of the thinking and infuse it into the engagement, not just bolt it on. Designing innovation with the customer relationship in mind will elevate and promote success across all your CX efforts. Effectively using technology that connects all data as well as providing authentic content can also help you achieve industry recognition for your accomplishments.

- Businesses need to look towards extensible cloud platforms that allow for visual configuration, have extensive open APIs with development examples, are mobile- and social-ready, can be easily extended with PaaS (platform as a service) development, and provide both out-of-the-box and reference integrations. Capabilities such as these help address IT’s objections to the level of effort needed to incorporate service requests in their design process. And they enable innovation without the need for heavy/costly customization, integration or middleware development—issues that are commonly raised.
Typically, a business’s largest volume of knowledge-related content is authored and disparately managed outside the customer service and support organization. This content is usually tailored to the more complex customer issues and resolutions. These require a broad and deep level of associated product, service, and usage knowledge in order to identify the nugget of information required to resolve that particular issue. This type of knowledge forms the remaining 80 percent of content that is needed to support 20 percent of your customers. The types of customer who require this depth and breadth of knowledge represent your current, past, or future most valuable engagements, and they might require more expensive agent-assisted channels and/or multiple customer engagements to extract and deliver the information necessary.

Adopting knowledge-management best practices enables enterprises to gather, structure, and distribute knowledge, along with technologies that help customers/agents find and access the knowledge in a measurable and unified way across all current and legacy systems. Furthermore, it generates the cost-justification insights required for ongoing investments in evaluating, revising, translating, syndicating, and maintaining the most valuable knowledge assets for the right audiences.

Businesses should look towards solutions that have well-structured natural-language-processing capabilities, so they can understand your business language as it changes, and adapt to new customer/agent needs as they evolve. They must also be able to understand your content at word, sentence, and document level for what it answers, and be robust enough to handle the ever-growing volumes of content and usage data pouring into your business. Connect knowledge as a service through open APIs that are integrated across your enterprise systems, and augment any application with the right version of the content, delivered for the right person, at the right time, over any channel. Design applications that can be infused with your simple FAQ knowledge in a modular way so that you are able to relate associated articles within a complete resolution flow.
Unify All Customer and Business Data

- Disparate customer data records from siloed channels, systems, and departments require lengthy, unrewarding efforts to access, cleanse, de-dupe, and reconcile into meaningful data. Historical views of data can be both misleading and not useful if you're trying to apply or derive meaningful change. Inaccurate data leads to missed opportunities, wrong or misleading communications, and irrelevant engagements that have a negative impact on the customer relationship—and result in a negative outcome from investments.

- If you put bad data in, then you will get bad data out. Data that is unified and cleansed while being gathered becomes easier to centralize and harvest for feeding into engagements for timely action. Centralize a 360-degree view of the customer by unifying the insights during every transaction and through post-process analytics.

- Connect the customer service data that was unified across all channels with Sales and Marketing data in back-office systems (via API integration) into a single customer Master Data Management (MDM) view. Then, leverage business intelligence (BI) analytics to process the “small data” that can be applied during the interaction. Finally, extend the agent desktop to dynamically receive the real-time insight for system rules and agent customer engagements (this is known as extensible configuration).
Personalize Customer Engagement

- A business that embraces a modern marketing approach to customer engagements (but has a customer service and support practice with a traditional limited segmentation model) creates an experience gap for the customer. Customers expect the brand to deliver on its promises. High-cost channels of engagement can’t scale to the needs of all customers and must be optimized for longer engagements with higher-value customers. The effort of obtaining the data needed for engagements can far outweigh the value derived from the engagement, or worse, prevent the data from being used at the time when the engagement is needed.

- Leverage historical, trending, and real-time customer behavior and insight data with intelligent system-driven multichannel engagement outreaches. Use self-learning engagement-routing rules, followed by automated online virtual agents, and deliver recommended next-best actions on the desktop for agents during live engagements to provide timely, relevant, personalized customer engagement.

- Adopt solutions that are designed to easily gather historical information, that have self-learning intelligence, and that can use natural language processing to understand customer intent, monitor real-time behaviors, take automated actions for invitations to connect, optimize routing, or make recommendations based on the trending data available.
9 Connect All Brand Experiences

- Businesses that are embracing customer experience are differentiating themselves from their competitors, and achieving organic growth at significantly lower acquisition costs through experiences that deliver on the promise of the brand, during the customers’ moment of truth. However, businesses embracing customer-experience initiatives are still operating and funding them inconsistently in organizational silos, and making the majority of CX investments within Sales and Marketing. The combination of heavy investments in siloed CX efforts increases acquisition costs, and further reduces operational budgets for service- and support-driven initiatives—taking from Peter to pay Paul. This fragmented and disconnected strategy actually has a negative impact on the businesses’ delivery of customer experience, which further hurts the brand and increases customer churn.

- Having customer service and support supply customer insights for marketing and sales-driven customer engagements delivers on the brand promise to customers, and on the returns of CX initiatives for the business. This results in customer service and support being viewed as a strategic partner in all CX investments and decisions.

- Modern businesses need to invest in a unified, cloud-based, customer-experience platform that leverages a combination of robust, open, standard APIs, native common applications (in sales, marketing, and service), and support development of custom applications for unified engagements through PaaS development.
In Summary

Trying to jump the chasm to become a modern service business in siloed initiatives only creates experience gaps with the ones you leave behind, and burns your investments.

Not having a comprehensive and cohesive maturity strategy that evolves and guides your organization towards being a modern customer service organization will result in a continued lack of funding, resources, and priority—stopping your business from reaching its customer service goals.

Focusing your customer experience efforts solely on the promise within Sales and Marketing will prevent you from delivering on that promise, impact customer retention, and increase your acquisition costs.

The only way to achieve sustainable growth and profit for your business in today’s modern world is to incrementally, intentionally, and purposefully invest in placing customer service at the heart of your business and customer experience efforts.

The Oracle Roadmap to Modern Customer Service maturity framework, with the supporting Oracle consultative discovery programs and Partner Network, has been designed to effectively lead you towards the desired state, and show you how to get there.

Ready to start your modernization journey?

If you’re ready to set off on your path to modern customer service, make sure you visit our Modern Customer Service page, where you’ll discover a complete roadmap designed to help make your journey as simple and successful as possible.

You’ll also find a wide range of other resources to help you see why the time has come to change the way you approach service, and how you can transform the department from a reactive cost center to a proactive driver of measurable business value.
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To learn more visit https://www.oracle.com/applications/customer-experience/service/index.html.

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