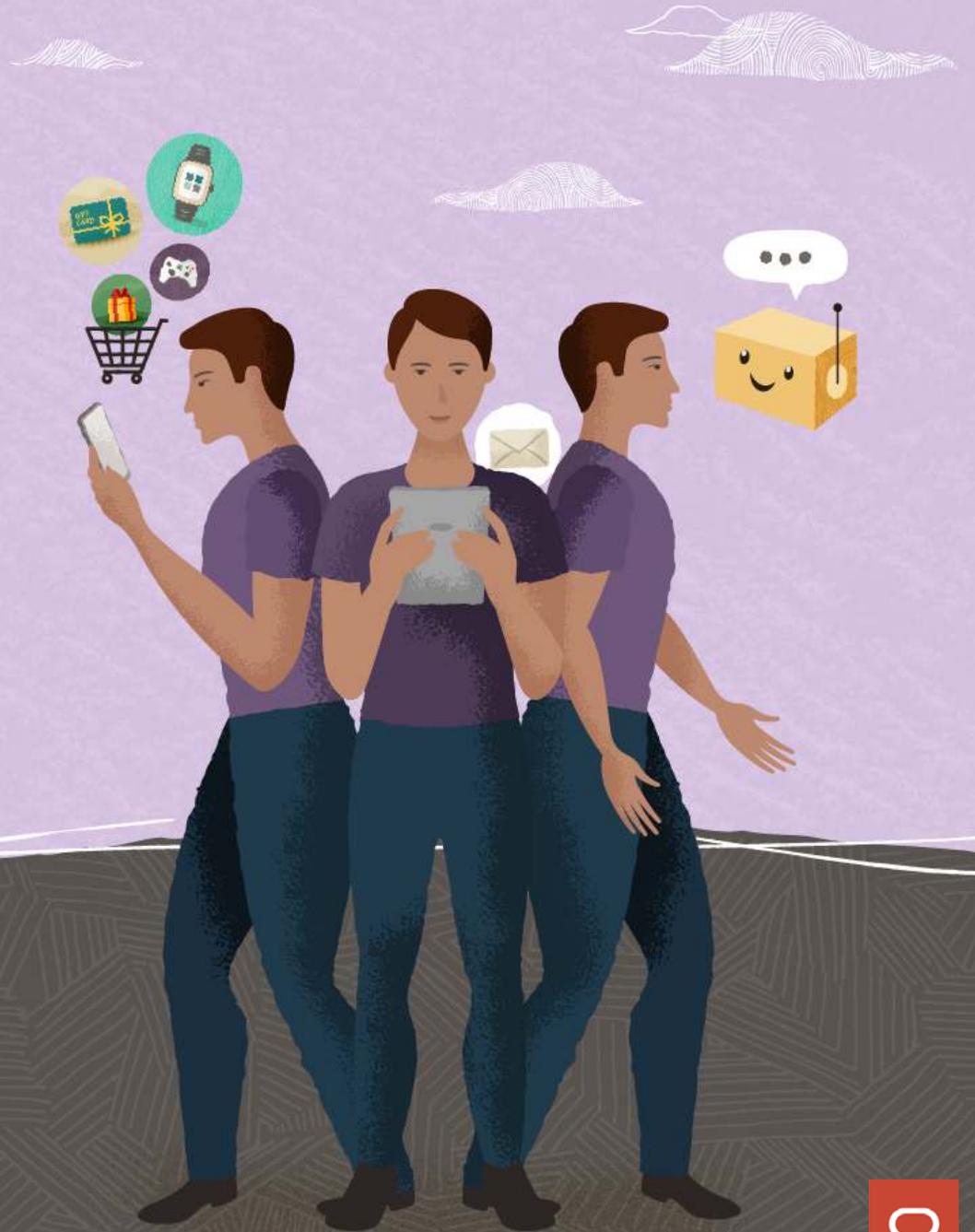


ORACLE

The Mega Guide on Customer Service

From basics to proactive service strategy: A guide for leaders



The “new normal” means new challenges for service organizations

The nature of service has shifted dramatically over the last two years.

The global events of 2020 through 2022 sparked mass disruption across industries, and the resulting confusion and unease among customers caused service inquiries to spike. In the midst of this surge, companies also had to shift their call centers to operate remotely almost overnight in order to adapt to these emergency circumstances.

As we look back, it’s clear that those adaptations brought long-term value—for companies and customers alike. Digital transformation was a strategic goal for service organizations for years. Now, out of sheer necessity, they’ve made enormous progress faster than we thought possible. Forced innovation is innovation, nonetheless.

The challenge? Service organizations believed digital transformation would differentiate them in customers’ eyes. Now that all companies have gone through it—that’s no longer the case. The service experience has become commoditized, and capabilities that were once stretch goals for service teams are table-stakes in the new normal. The question now is: How can organizations deliver digital service experiences that go above the baseline?

Transform to digital-first service

Digital-first service is the next phase of digital transformation, and the first companies to provide it will set themselves apart in the years ahead.

Where the current state of service is reactive, expecting customers to make the initial outreach, **digital-first service is predictive, anticipating customer needs before they arise.**

While today’s service is one-size-fits-all, **digital-first service creates a unique experience for every customer based on their needs and characteristics.**

And while service today is built for efficiency, **digital-first service prioritizes hyper-convenience for customers.**

Digital-first service

Predictive

Unique

Hyper-convenient

This guide will outline your journey to digital-first service by strengthening the foundation of your customer service operation so you can build a next-generation contact center and reach the new frontier of proactive service management.

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Strengthen your foundation for digital customer service

Ask someone to recall a recent customer service experience, and there's a good chance you'll get an emotional response—either love or hate.

Some companies are notorious for poor customer service, inspiring stinging viral hashtags. Other companies earn fanatical devotion due to their outstanding customer service. Service experiences are critical to both short-term customer satisfaction and long-term customer loyalty. And with most now occurring online, there's never been a better time to perfect your digital customer service strategy.

A digital-first strategy for customer service can help companies anticipate and adjust to shifting market circumstances, predicting customers' needs and meeting them—even when traditional service channels are disrupted. Intuitive, modern digital service processes empower service agents, too, increasing

their job satisfaction and reducing costly employee turnover. Still, service and customer care leaders feeling the pressure to innovate must do so while keeping costs under control.

Here are some factors to consider when crafting a strategy that can deliver on customers' rising expectations—while also making service processes more efficient and profitable.

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Digital customer service, defined

Digital customer service is exactly what it sounds like: providing service experiences through digital channels such as a website or mobile application. Those experiences generally fit into two classes.

In assisted service, human agents deliver customer service using digital channels like chat or online video conferencing. While the modes of communication used are different, these experiences are very similar to their traditional counterparts.

Digital self-service makes it possible for customers to serve themselves without a live agent's assistance—but there's much more to it than an online help center. Advanced features such as process automation, natural language processing (NLP), and artificial intelligence (AI) can be used to

- Troubleshoot problems
- Explain contract and warranty terms
- Automatically reset login credentials
- Demonstrate proper assembly and usage
- Connect customers with expert advice—and more

Common digital customer service channels

Digital assistant: Usually appearing in a pop-up window or box on a website, a digital assistant can be voice- or chat-activated and utilizes AI and NLP to answer common customer questions.

Web portal: A web portal is a self-service website that allows customers to search a knowledge base or a customer community for answers. Many also invite customers to submit help request forms or contact AI- or human-assisted customer support via a chat window.

SMS text messaging: An increasingly popular channel, many companies and customers are now sending and receiving service queries and notifications via text. 84% of consumers have received a text message from a business. And of those, 55% received a service notification.¹

Social media: Many customers now turn to companies' official social media accounts to engage with their customer service departments.

35.4%

of companies can **provide full-service support** through social media.²

48.2%

prefer to **redirect service requests** from social media to other channels.²

32.8%

leverage social channels to proactively **inform customers of downtime and other issues**, reducing related inbound service requests.²

Digital customer service, defined

Together, assisted service and digital self-service can help companies overcome persistent challenges and transform customer service from a cost center to a source of increased customer and company value.



Automating repetitive processes, decreasing inbound call volume, and curbing agent turnover reduces service costs by 20–40%.³



Overburdened agents are free to focus on service interactions that provide unique value, such as offering advice on new products, helping customers upgrade, or working through particularly complex resolutions.

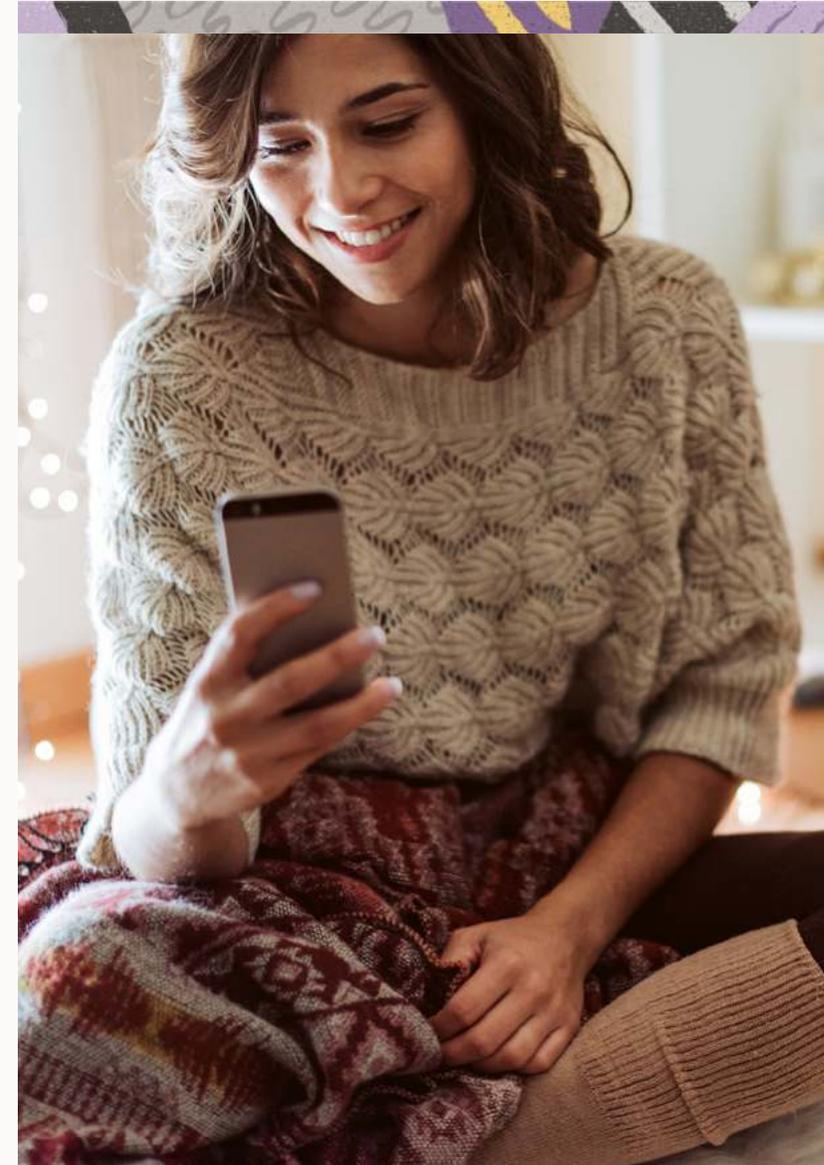


The cost of replacing an employee can range from one-half to two times that employee's annual salary.⁴



Companies offering service experiences through digital channels have more loyal customers and can increase their customer satisfaction by 15–20%.³

Let's start building your strategy for digital customer service.



Build your foundational strategy

Conventional industry wisdom recommends offering customers multiple channels for service. However, failing to connect those channels creates a disjointed experience and increases reliance on IT.

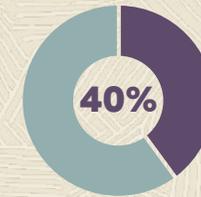
Current customers may be slow to adopt digital channels for any number of reasons, lack the means and technology they require, or feel uncomfortable sharing data digitally due to privacy concerns. And decision-makers in risk-averse companies may be hesitant to adopt digital customer service and doubt its ROI potential.

Siloed or incomplete information presents obstacles as well. For instance, agents without access to account information that's locked in financial and supply chain systems can't get a complete picture of each customer. And in companies that sell to other companies, sales and service teams using different management systems and data don't have a complete understanding of customer needs and history.

With these challenges in mind, here are important factors in formulating the right digital customer service strategy for your business.

1. Your customers

Digital customer service is not a one-size-fits-all solution, so it's essential to carefully consider customer profiles as you build. For example, while digital assistants are popular among Gen Z customers, less tech-savvy generations may not be so eager to adopt them. Or, customers in heavily regulated industries like finance may prefer not to provide sensitive information through a chat window or web form. To encourage more customers to use digital channels, provide options that reflect their needs and preferences.



Most service leaders agree that up to 40% of live service requests could be resolved through self-service.⁵

2. The human-to-robot balance

Most businesses will benefit from a combination of human-assisted service and AI-powered self-service. To make the best use of your resources, establish a threshold to govern when customers can escalate requests from a bot to a human agent. Many businesses prefer self-service for handling simple, recurring requests such as checking the status of an order or canceling a subscription. More nuanced tasks, like determining eligibility for an upgrade or replacing a complex piece of machinery, likely require a human hand. Find the right blend that satisfies customers and supports agents.

Build your foundational strategy

3. Channel mix and complexity

Modern customers like having options when they need to contact customer service. However, there is such a thing as too many channels. A Gartner survey found that companies offering more service channels saw an increased volume of requests in their service centers. The same survey found that 61% of customers will use both assisted and self-service channels to resolve a single service request—a practice known as channel switching, which can complicate resolution journeys and duplicate costs by engaging human agents and AI.⁵ To mitigate this, select digital service channels carefully and define distinct use cases for each.

Self-service channels like web portals cost about \$.10 per contact, vs. \$8.01 per contact for live channels such as phone, email, and live chat.⁵

4. Channel and data silos

Every channel generates transactional, customer, and/or behavioral data. But, if that data is siloed and disconnected, its value is limited. Agents and customers will struggle to connect the dots, manually piecing together interactions and records from different systems—and likely noticing gaps in the process. It is inefficient and frustrating for both parties when customers have to provide the same information repeatedly. To prevent lapses in customer understanding, a digital service strategy should integrate channels so accompanying data is connected and complete.

5. Existing channel performance

Think of digital service channels as something to augment—rather than replace—existing channels. 56% of service leaders are adding new channels or features within their existing channels, but customers still call for live support.⁶ To give customers choice, optimize and augment the channels you have as you build out their digital counterparts.

With a thoughtful strategy in place, you'll be able to deliver digital customer service that satisfies customer expectations while utilizing resources efficiently.

Five steps to get started with digital customer service

01 Audit your competition

Knowing how competitors deliver digital service can help you understand customers' expectations. Find out which channels your competitors are using, and how. Consult public customer reviews, analyst reports, and other market analyses. If possible, go undercover as a competitor's "customer" and walk through the digital service experience yourself.

02 Regularly analyze digital channel performance

Ask yourself the following questions:

- **Adoption:** How consistently is each channel used?
- **Customer satisfaction:** How do customers rate their experience with each channel? What is the resolution rate and average resolution time associated with each channel? Are customers switching channels during an engagement, and if so, why?
- **Efficiency:** How often are self-service interactions escalated to human agents? Are these interactions truly so complex that a human is needed, or could you optimize the self-service experience to make resolution easier?

03 Consult your top-performing agents

Digital processes should benefit both sides of the service experience—your customers and your employees. Your star agents have seen it all, and many would jump at the opportunity to help shape new processes according to their experience. Strongly consider their input as you enact your strategy.

Five steps to get started
with digital customer service

04 **Meet with
your IT team**

Dive into your company's technical roadmap to understand the business pressures IT faces, because you'll likely face them, too. Ask your team what it costs to maintain and integrate current service channels, learn about planned upgrades to the technical infrastructure, and gauge their comfort level with emerging technology such as digital assistants and AI.

05 **Talk things through with
your marketing leadership**

Ask for research and insights on current market conditions and your brand perception. Make sure you're aligned on who your customers are, what they expect, and what they think about your company.

Reap the benefits of a successful digital customer service strategy

Strategic digital channels help you meet the increasing demand for assisted and self-service anytime, anywhere, to elevate your brand in the minds of your customers.



1. Customer satisfaction

An efficient mix of traditional and digital channels makes it quicker and easier for customers to get the assistance they need.



2. Agent fulfillment

Skilled agents can focus on unique service requests that give them the opportunity to deliver more value to customers, driving job satisfaction and retention.



3. Reduced costs

Deploying AI and automation to resolve simple service queries speeds time-to-resolution and contains costs.



4. Stronger revenue generation

Without the additional burden of having to resolve repetitive service requests, top-performing agents can focus their talents on helping make service a revenue-generator.

A comprehensive strategy for digital-first customer service will help ensure that your service differentiators are built into your foundation, from the start. With that foundation in place, you're ready to tackle guided self-service.

Pillar 1 Build a unique guided self-service experience

When it comes to customer support, today's consumers and employees want it to be as convenient as updating their social media profile or buying a product with one click. That's why digital self-service has become their go-to approach for finding answers and resolving issues. It lets them avoid long call center wait times and puts them in control.

Guided self-service adds automated assistance to make it even more effective. It can be a chatbot asking questions that steer a customer toward the best resolution or a pop-up message that provides additional information to someone completing an online form.

Businesses that commit to digital innovation—including guided self-service—are more successful.⁷

With guided self-service, companies need fewer live agent interactions for simple tasks, so their team can focus on more complex issues. And customers benefit by getting personalized support easier and faster, making them more likely to remain loyal to your business. According to Gartner, customer effort (how easy or difficult it is for customers to find what they're looking for) is the most accurate predictor of customer loyalty—a full 40% more accurate than customer satisfaction.⁸



Why guided self-service matters today

Because 40% of consumers now prefer self-service over human contact and 69% of consumers try to resolve issues on their own, it's critical that businesses offer guided self-service to ensure success.^{9,10} FAQs and contact forms are no longer enough. Automated assistance goes further to give people the guidance they need to resolve their issues, based on their particular circumstances and preferences.

Guided self-service also offers several business benefits, including



Improved customer experience and brand loyalty:

Being able to quickly find answers and resolve issues creates happy customers—and happy customers become loyal customers.



Reduced costs:

With the right technology, customers can help themselves, and your company can reduce service costs because fewer service tickets and calls are needed.



Increased productivity:

When self-service is automated, your team can focus on more critical, complex issues instead of simple, repetitive inquiries.

Examples of guided self-service

At home/On the road: Imagine you have a flat tire. You call your road service or insurance company and the system asks you to “press one” for towing service. You are then texted a link to a chatbot that asks you questions and automatically contacts the nearest towing service to dispatch assistance. Anticipating that you’ll wonder who’s coming to help you, you’re also texted the name of the towing company and an estimated arrival time. Later, you’re asked if you’re satisfied with the service or need more help. The chatbot gives you a phone number you can conveniently call with a single tap.

In the office: Guided self-service can help employees sign up for benefits like health insurance and complete tasks such as promotions, transfers, and raises. For insurance, automated questions appear to help you determine which benefits you’re eligible for based on your location, family status, and other personal details. It then provides action items and other information based on your answers.

Besides being easy to use and putting employees in control, guided self-service provides mobile capabilities, built-in approvals, and workflows—while also eliminating paperwork.

Service options that drive success

Guided self-service can be your brand differentiator. But you can't just set it and forget it. It's a continual service evolution driven by several fundamental tools and metrics to ensure its effectiveness.

A successful guided self-service strategy should include several key capabilities.



Knowledgebases:

Information about your products and services often included in frequently asked questions, white papers, video tutorials, and more.



Chatbots:

Also known as digital assistants or digital agents, chatbots use AI or natural language processing (NLP)-powered software to understand, analyze, and respond to customer queries.



Customer intelligence:

The process of gathering and analyzing customer information—such as their purchase history, behavioral data, or customer details—to provide personalized support and develop a stronger relationship.



Decision automation:

Technology that guides the customer through a series of questions and delivers personalized information and advice.



Proactive engagement:

Based on customer activity, this automated assistance may appear as chat pop-ups, suggested knowledge base content (also known as contextual knowledge), or options to speak to a live agent.

In a market where most service experiences require customers to speak with an agent and wait for resolution, guided self-service options that let them skip the call and solve problems on their own stand out.

Next, let's explore a way to deliver the convenience of self-service with the added benefit of agent involvement.

Pillar 2 Create hyper-convenient self-service through chat

Chat is a convenient way for customers and service agents to communicate online.

How does it work? Similar to a text message, chat windows pop up on a company website or mobile app, inviting visitors to connect. This technology allows prospects and customers to get their questions answered and problems resolved quickly—without having to call customer support.

There are two types of chat technologies.

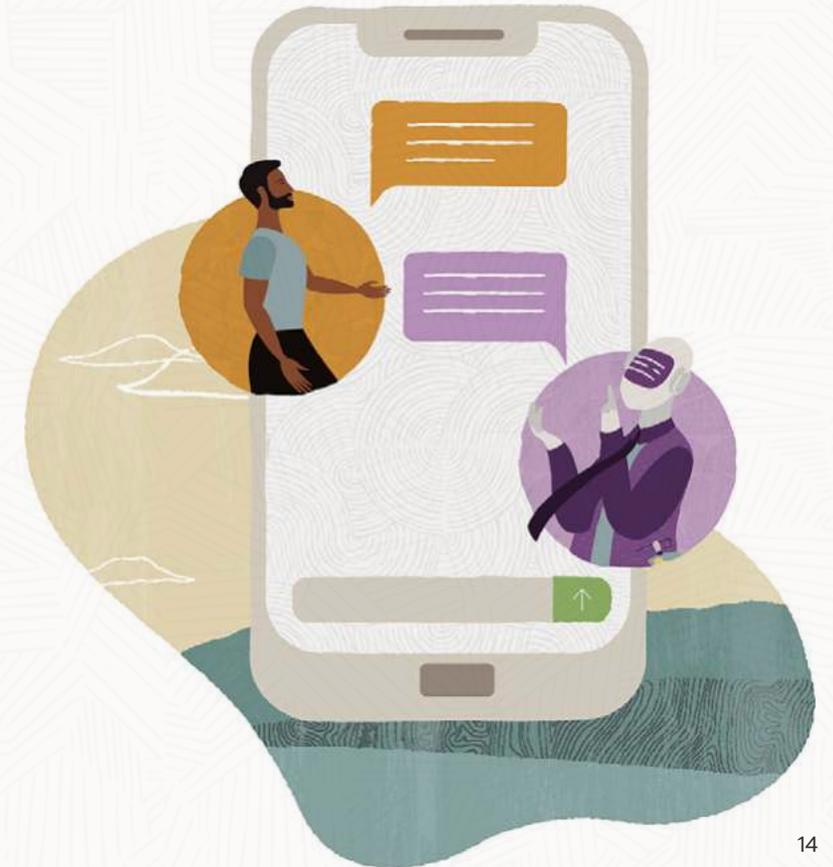
- **Live chat** refers to human service agents communicating with customers in real time via a chat interface
- **Chatbots** use software powered by artificial intelligence (AI) to understand, analyze, and respond to customer queries sent through chat

Global customer satisfaction rates with live chat range from 75–98.5%.¹¹

Chat has become popular in call centers for a variety of reasons.

- **It makes it easy to engage** with customers in real time, anytime, through text, voice, or video
- **It reduces call volume** and wait time, bringing relief to overwhelmed agents and increasing service productivity
- **It helps foster a personalized experience**, using relevant account and historical information such as purchase history

Let's dig into the basics of chat and how it can help you better serve your customers and create a hyper-convenient customer experience.



Why chat matters today

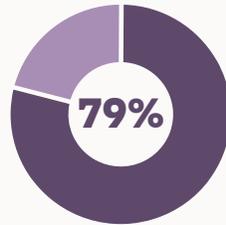
Getting chat right is important to your customers, your agents, and your business.

Even though it's been around since the mid-90s, adoption has grown significantly in recent years thanks to advanced technologies like AI. Natural language processing (NLP), a branch of artificial intelligence, helps computers understand, interpret, and manipulate human language to create more relevant, personalized chat conversations.

Chat benefits your customers and your business in big ways

Customers appreciate the convenience of

- **Not waiting on hold** or navigating an endless automatic phone menu
- **Being able to multitask** while chatting with an agent
- **Getting answers** and issues resolved faster by chat than phone or email



79% of consumers say they prefer live chats because they offer instant responses.¹²

From a business perspective, chat can

- **Help service agents** work more efficiently and productively
- **Reduce support costs** when chatbots are used versus live agents
- **Improve the quality of service** and build customer loyalty
- **Provide 24/7 support** from live agents or chatbots



How chat drives success in service

Chat is just one part of the customer engagement journey, and by itself, will not deliver the kind of connected service experiences your customers expect.

It's important to think about how you'll capture and store chat transcripts for future reference and what types of information you'll need to pass from chatbot to agent when transferring to a live agent. The best chat strategy is one that seamlessly bridges the gap between self-service and live agent assistance.

Beyond communicating with customers, answering questions, and resolving tickets, chat can also be used to

- Process bill payments
- Subscribe customers to a mailing list or service
- Schedule a meeting or appointment
- Gather suggestions and feedback

How chat increases agent productivity and efficiency

Live chat can help agents efficiently resolve simple, repetitive customer queries such as answering routine questions, assisting with website navigation, or helping customers complete forms. And, with tools to speed agent response time via chat, agents can be more productive and focus on more complicated tickets that benefit from their expertise. These tools include

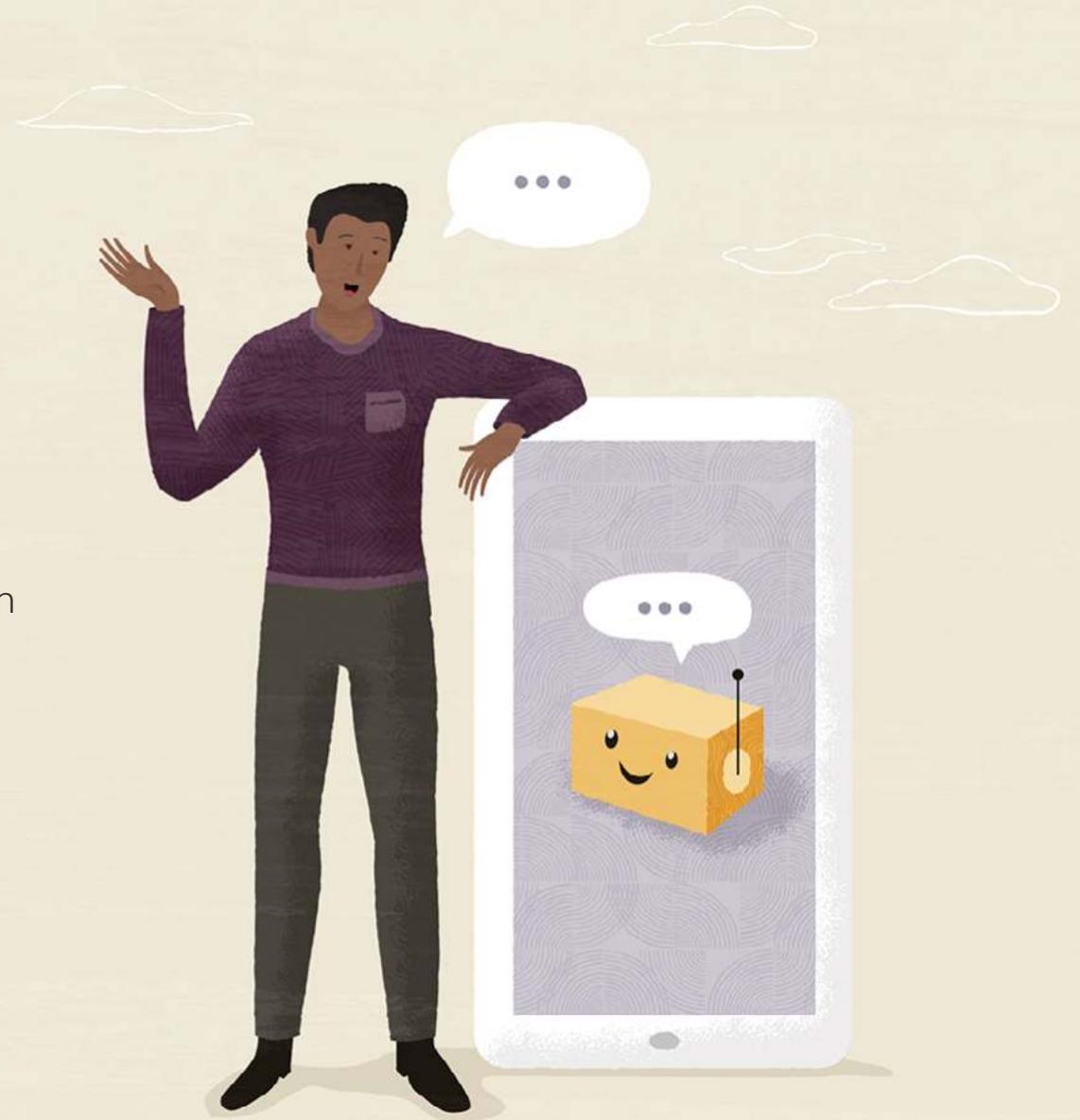
- **Standard responses:** Predefined answers to frequently asked questions (FAQs) and customer queries
- **Screenshare/cobrowsing:** Allows agents to see some or all of the customer's computer screen and control navigation in real time

Interactions that include cobrowsing generate customer satisfaction rates six points higher than average.¹³

- **Annotation on screenshare:** Lets agents make notes directly on a customer's screen to guide them through a process or draw attention to a specific item
- **Video:** Two-way service where agents and customers communicate via video and audio
- **Chat transfer and conference:** Allows agents to get input from their peers to help customers more quickly or transfer them to a different agent
- **Multiple chat handling:** Lets agents assist more than one customer at a time
- **Integrated view of a customer's complete history:** Gives agents the information they need to provide the right response

Service experiences have an outsized impact on customers' perceptions. If yours isn't convenient, your brand, by extension, makes life harder—not easier. That's why this first leg of your journey toward digital-first service is about minimizing customer effort through hyper-convenient service experiences.

In the next chapter, we'll explore how you can adapt processes within your internal service organization to underscore that benefit further.



Build your next-generation contact center

Delivering exceptional customer service has never been easy. You need happy agents, meaningful customer insights, and innovative technology—all of which require agile contact center management that evolves with your business and the market as a whole.

The year 2020 offered a prime example. In response to the global crisis, service organizations everywhere suddenly had to shift their contact centers to remote operation. Meanwhile, as industries were rocked by supply chain issues, shipping delays, and closures, service inquiries from confused and uncertain customers increased rapidly. Service organizations that were prepared for the unexpected weathered these changes much better than those who'd let innovation take a backseat.

Bottom line: Today's contact center experience looks different than in years past—so much so that a contact center today isn't really a "center" at all. And change is far from over. But, if you take a forward-looking approach to contact center management, you can protect and even boost your revenue—no matter what comes.

40% Effective contact center management can result in 40% higher employee and customer satisfaction (CSAT) scores.¹⁴



In this chapter, we'll explain how to develop a digital-first contact center management strategy that delivers a more satisfying experience for agents and customers—while building operational resilience that will serve you well in the years ahead.

Chapter II at a glance

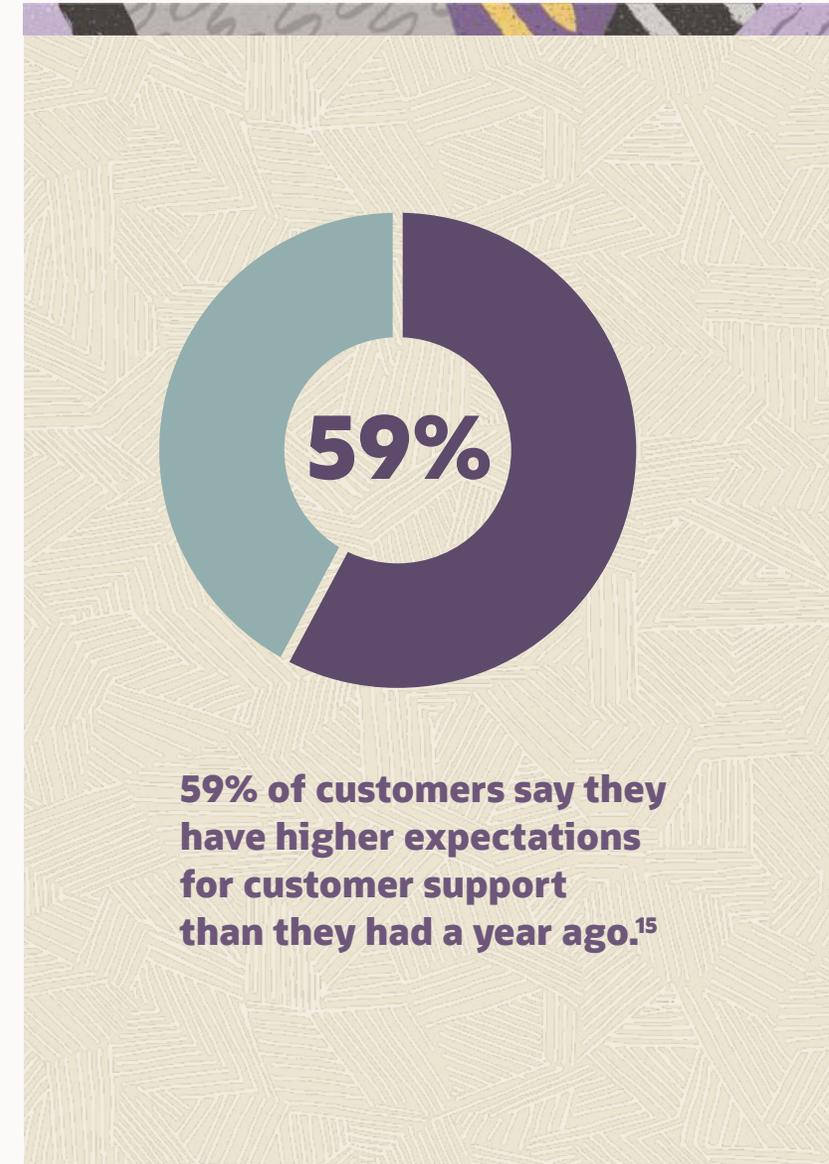
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Contact center management, defined

How do businesses manage their daily contact center operations, including technical support, customer service, and sales assistance? And what are their strategies for helping customers across multiple channels such as voice, email, chat, video, and social media? That's what contact center management is all about.

Whether you primarily serve consumers or businesses, effective call center management can help you

- **Deliver personalized service** on any channel, across the entire customer journey
- **Automate time-consuming processes** to free up agents so they can focus on high-value engagements
- **Boost agent productivity** and retention with tools that empower them to build trusted customer relationships
- **Reduce new hire training** and onboarding costs
- **Improve first-time resolution rates,** resolution consistency, and customer satisfaction
- **Lower service costs** with increased agent productivity and retention
- **Collaborate effectively** between front- and back-office teams for higher quality customer service and more upsell and cross-sell opportunities
- **Generate more revenue** and differentiate your brand from competitors



Contact center management

Without effective call center management, you're more likely to experience



Frustrated customers who have difficulty getting help, need to repeat their information to different agents, and receive incorrect information



Elevated costs due to new hiring and training



High agent turnover due to outdated and disconnected systems, unrealistic satisfaction scores, and inconsistent institutional knowledge



Disparate data and systems that provide different customer views and hinder internal collaboration



Build your foundation

Developing strategies to improve your contact center can seem like a daunting task. But if you focus on these five areas, you'll be on your way to providing better customer experiences.

1. Customer preferences

Do your customers prefer to engage digitally or on the phone? Are they comfortable with text messaging or video? Can they easily access these different channels and devices? Questions like these will help you better understand your customers and think about what changes you may need to make.

If you sell to businesses that must comply with data privacy regulations, your contact center will also need to be built around these requirements.

2. Business goals (short-term and long-term)

Every service organization has different goals. For some, they've been asked to turn customer service into a revenue generator by selling additional products. Others need to improve operational efficiency so that fewer agents are needed. Or maybe there's a focus on automating more aspects of customer service to

reduce staffing costs and fund innovation. As you set out to develop your plan, consider your initiatives and whether they are likely to stay the same or change over time.

3. Company's growth strategy

If you plan to expand globally, your contact center employees and systems might need changes. For example, you may need to hire agents who speak specific languages or change processes to comply with regional data capture and privacy laws. If you're launching new products and services, your agents will need training on them. And if mergers or acquisitions are on the horizon, it's essential to think through the technological, operational, and human resources challenges of combining contact center operations.

4. Hiring and talent management

Your agents are the public face of your company, but good help is hard to find—and expensive. Every time you lose an agent, it costs your contact center \$35,000 to \$105,000.¹⁶ What is your company's hiring

and talent management philosophy? Do you have the technology infrastructure to support remote employees on a long-term basis? Whether your employees are remote, onsite, or a combination of the two, consider how you can improve onboarding, training, and management of your employees.

5. Innovation

There are many opportunities to optimize contact center operations through automation—from simple service requests to complex workflows. Consider how you might use innovation to improve your customer and agent experience. Will those innovations work with your IT roadmap and is there support for investment and experimentation with emerging technologies? Your agents will need to be prepared to adopt these kinds of changes and receive any necessary training.

Five steps to get started with contact center management

01 Determine points of friction

Work with your agents and escalation department to discover the top points of customer and agent frustration. Are your agents spending valuable time on repetitive tasks that could be automated? Are customers offered self-help content that doesn't solve their issues? Analyze both your agent and customer journey to identify opportunities for automation, streamlining, and improvements.

02 Identify the channels your customers prefer

Contact center success is all about customer satisfaction. How do your customers prefer to engage? Look at metrics to see which channels are used most and review customer feedback to discover the biggest areas of friction and frustration. Once you grasp your customers' preferences, do you have a plan in place to engage on those channels? For example, if most of your customers prefer mobile chat, do you offer that option? Find out if your customers are using new channels you may want to add. Consider meeting with IT, service leaders, and top-performing agents to identify technology gaps, potential solutions, and ways to measure success.

03 Evaluate and invest in your technology stack

Find out if your service team has the applications and communications tools they need to maintain operations—even in the face of the unexpected. Once you identify the gaps, include some of your top-performing agents in the process of evaluating and selecting new apps. The more involved they are in the process, the more they'll feel valued and invested in the success of the team. And keep in mind that new agents joining right out of school will expect to use the latest apps and expect remote flexibility in the long term. In fact, 16% of Gen Z and Millennial employees have quit because their employers failed to provide the proper technology for them to do their jobs.¹⁷

Five steps to get started with contact center management

04 Create your innovation plan

How can you take your contact center from good to great? Your IT group can help you explore the latest innovations in automation and data analytics. Implement features like screen sharing, video chat, internal collaboration tools (such as Slack), and guided assistance for recommended agent actions, etc.

But don't limit your innovation to technology alone. A fresh approach to your people and processes can also enhance your contact center. Work with your HR team to get recommendations for agent hiring and training. Think about new ways to use your current CRM. Create bonus programs that motivate your agents with rewards that are meaningful to them.

05 Set measurable goals for now and the future

Determine short- and long-term goals that address your current contact center challenges, as well as service technology trends that will emerge over the next five years. These can include:

- Improving customer satisfaction (CSAT) scores
- Speeding resolution times
- Improving first call resolution rates
- Reducing contact center call volume
- Decreasing number of escalations
- Shortening agent onboarding times
- Improving agent productivity
- Improving employee experiences ratings

Benefits of effective contact center management

Great contact center management is critical to both agent and customer satisfaction. It also supports the growth of your business, as well as your overall brand.



1. Help your agents get more done

Leave the days of navigating multiple screens and systems behind. A single-interface platform requires less training and helps agents resolve issues quickly, without getting overloaded by customers waiting in the queue.



2. Show your agents you value them

The average contact center has a turnover rate of 30 to 45%.¹⁸ Beat those odds by recognizing high performance, providing career development opportunities, and outlining a clear growth path. Put in place measures and training for your agents to work more flexibly—when and where that works for them.



3. Get a complete view of your customer

When your customer service system is integrated with customer-facing marketing and sales systems, as well as financial and supply chain systems on the back end (including billing, order management, inventory, and shipping), your agents have the data they need to provide the most accurate service.



4. Fulfill customer expectations

Your contact center must provide the platform for an exceptional customer experience. A majority of consumers— 61%—say they've stopped transacting with a business after a poor service experience.¹⁵ That's why it's critical your customers receive consistent, accurate, seamless service across all channels.



5. Expand your definition of customer service

Contact centers don't have to just be cost centers. Through integration with other systems and collaboration with other business units, your agents can help upsell and cross-sell. Want to improve your products and services? Have agents ask for feedback. When customers feel heard, they feel more loyal and are more likely to recommend your company to others.



90% of customers more favorably view brands that give them the opportunity to provide feedback.¹⁵

Forward-looking contact center management will help ensure that your front-line service providers have what they need to deliver excellent customer experiences—even in unforeseen circumstances.

Next, let's focus on what an excellent experience looks like for your agents.

Pillar 3 Transform service with enhanced agent experience

There's a saying in customer service: "Happy agents create happy customers." But getting there depends on the agent experience.

Let's start with a few key questions. How empowered, satisfied, efficient, and productive are your agents? Do they have the tools they need to help customers quickly or do they face challenges every step of the way? These are the details that encompass the agent experience.

When you equip agents with the right training, tools, and support resources, they can provide exceptional service that delights customers. And as a bonus, great agent experience leads to higher retention rates—a perfect antidote to the high cost of agent turnover.

Employees aged 20 – 24 have an average tenure of 1.1 years at call centers.¹⁹

At this point, you'll identify positive aspects of your agent experience—and opportunities for improvement—so you can meet their needs, make them happier, and build on the success of your service organization and brand.



Why agent experience matters today

If your agents have a poor experience, chances are your customers will, too.

Even though it's directly linked to customer experience, many organizations miss the mark on agent experience. Product knowledge, agent attitude, and agent empowerment are among the top four factors impacting customer experience in agent-led transactions.² To provide great service experiences to your customers, your service agents need the right tools and processes to deliver efficient, accurate, and consistent service across all channels.

A positive agent experience can benefit your business in big ways.

Curtailed turnover.

Decreased agent turnover leads to reduced hiring and training costs. When agents have more time to hone their skills and build their knowledge, they'll be able to deliver expert-level service to customers.

Superior service delivery. Better service delivery results in positive brand differentiation, increased customer satisfaction, loyalty, and referrals.

Increased revenue. When you empower agents to take advantage of cross-sell and upsell opportunities, you'll be rewarded with additional revenue.

Decreased operational costs. Fewer escalations and reduced contact center KPIs, like average handle time and first-call resolution, result in higher agent efficiency and lower operational costs.

Satisfied agents can deliver the service experiences your customers expect.

Faster, more accurate service. When agents have the right knowledge and tools readily available, customers receive faster, more accurate service.

Reduced friction. Agents with a complete view of the customer can reduce friction along the service journey to deliver better customer experiences, which ties directly to revenue.

Personalized service. Armed with the right data, agents can personalize interactions with customers when it counts.

The basics of agent experience

Understanding the drivers of agent experience will help you better serve your customers.

1. Productivity

Unproductive agents aren't able to serve customers to the best of their ability. If an agent has to navigate multiple systems and screens to find the right information, and the customer has been on hold a long time, you'll end up with a poor experience all around. With unified agent desktops that integrate all communication channels and external applications into a single interface—along with embedded knowledgebase and team collaboration tools—agents can significantly speed their resolution time and help more customers.

2. Job satisfaction

Employees today have more options and more power than ever, so maintaining a consistent workforce can be challenging. Some of the factors that affect agent job satisfaction include

- Low salaries
- Repetitive tasks
- Inflexible work schedules
- Lack of career development
- Dealing with frustrated customers

While contact center management can't mitigate all of these factors, the incentive for improving agent experience should be a priority since the average agent turnover rate can reach a staggering 45%.¹⁸ If management can address as many issues as possible, they'll increase the likelihood of agents pleasing customers and, in turn, produce higher customer satisfaction ratings.

The basics of agent experience

3. Tools

Agents need the right tools to do their jobs effectively. With tools like agent scripting, AI-recommended actions, and decision automation, agents can resolve service requests with minimal training. Through automation and dynamic guidance, agents can follow step-by-step processes to deliver faster, more accurate service without having to dig around for the right answer. Some tools of the trade include

Agent desktop: A single interface for customer service applications and associated data from email, websites, physical stores, mobile sales, and account information customers provide when they contact support

Agent analytics: Role-based dashboards and reports that help management better understand agent productivity and effectiveness

Knowledgebase: A repository of information to answer questions accurately and consistently

Automated workflows: Technology that automates manual processes in day-to-day interactions

Feedback management: A process where agents solicit customer feedback for continuous improvement

Your agent experience has a direct impact on the quality of service you provide—and any investment in your internal team will pay off in the eyes of your customers. Visual engagement is a prime example. Now, let's explore how visual engagement can ease the burden of service for customers and agents alike.

Pillar 4 Delight customers with visual engagement

Visual engagement is all about real-time collaboration with customers on channels that feature a dynamic visual element. Here, we'll cover the fundamentals of visual engagement to help you quickly grasp how the practice can better serve your customers and bring value to your business.

Service agents can leverage visual engagement in many different ways.

- Helping customers navigate to specific information on your website, such as technical specifications or assembly instructions
- Assisting customers to complete an online purchase, form, or other process
- Demonstrating a product such as software or a small device
- Diagnosing and resolving problems such as incorrect software installation or the damage to an item during shipping



Why visual engagement matters today

Engagement with dynamic visual content is growing. Consumers watch more than a billion hours of YouTube content every day, with the platform reaching more 18 to 49-year-olds than any broadcast or cable TV network.^{20,21} In the business context, the global pandemic increased reliance on video, as organizations turned to the visual medium to conduct operations. As businesses and consumers continue to become more comfortable and capable with video, the importance of visual engagement will only increase.

The technology infrastructure is there, too. A majority of Americans have high speed internet at home to support video, and an even higher percentage have smartphones with a video camera.²²

Consumers use a growing number of communication channels that provide increasingly humanized experiences. This raises the stakes for businesses, as customers expect to receive the same level of convenience, connection, and ease they experience in their personal interactions.



The basics of visual engagement

By understanding visual engagement and its techniques and benefits, you'll be able to better serve your customers.

Part 1: Types of visual engagement

Video. Video is probably the most frequently employed channel. Agents use it to see customers or devices, which helps facilitate understanding and human connection. Video can either be one-way, when the agent is on video but the customer is not (or vice versa), or two-way, when both parties can see each other.

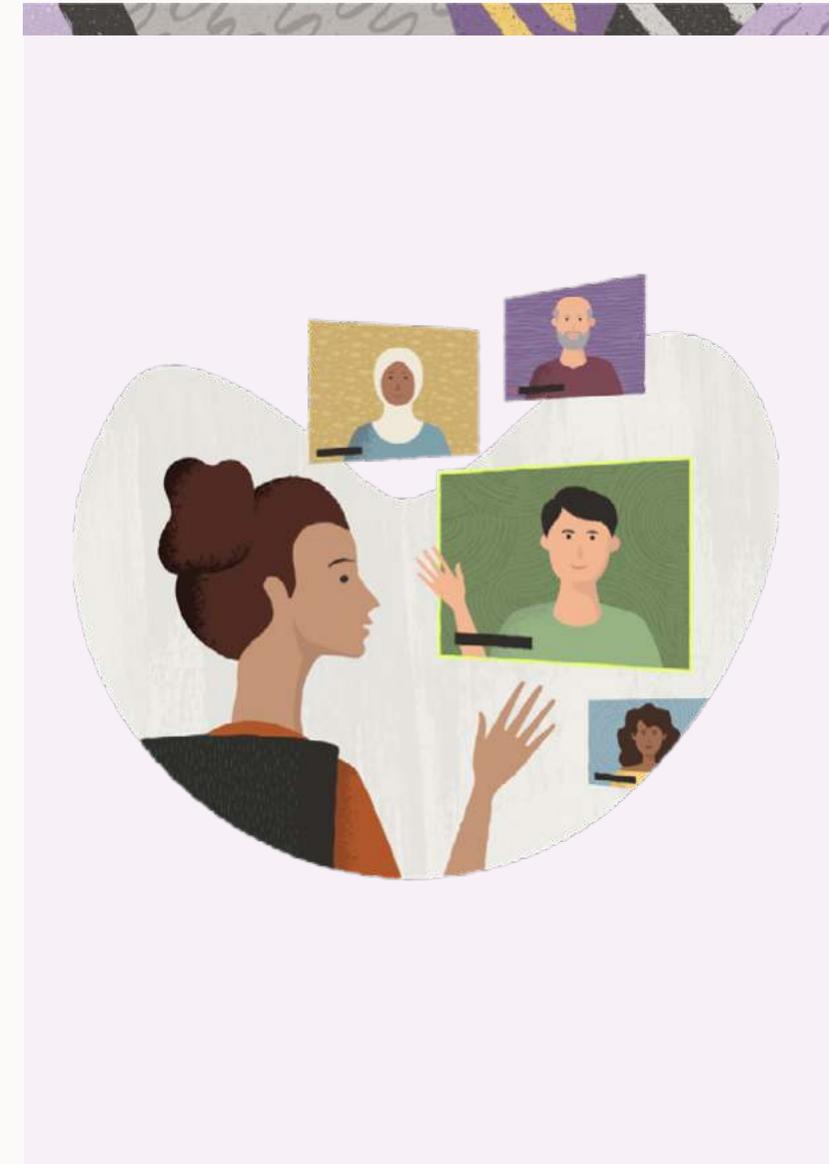
Cobrowsing. This technology makes it possible to interact with a customer by using his or her web browser to navigate. Agents are only able to see the selected web page, while other open windows and applications remain hidden.

Screen sharing. Sharing access to a computer screen remotely—either the agent to the customer, or the customer to the agent—helps you troubleshoot, instruct, and collaborate. Data controls mask sensitive information on customer screens.

Screen annotation. On a shared web page, agents may highlight, circle, underline, and add notes to content to help customers cut through the clutter and access the most relevant information.

Supplemental technologies. You may also add these technologies to ensure optimal customer support.

- Recording and transcribing interactions for later review by management helps improve service quality and uncover opportunities for training agents.
- Third-party conferencing enables agents to pull in extra help if they need a consultation to resolve an issue.



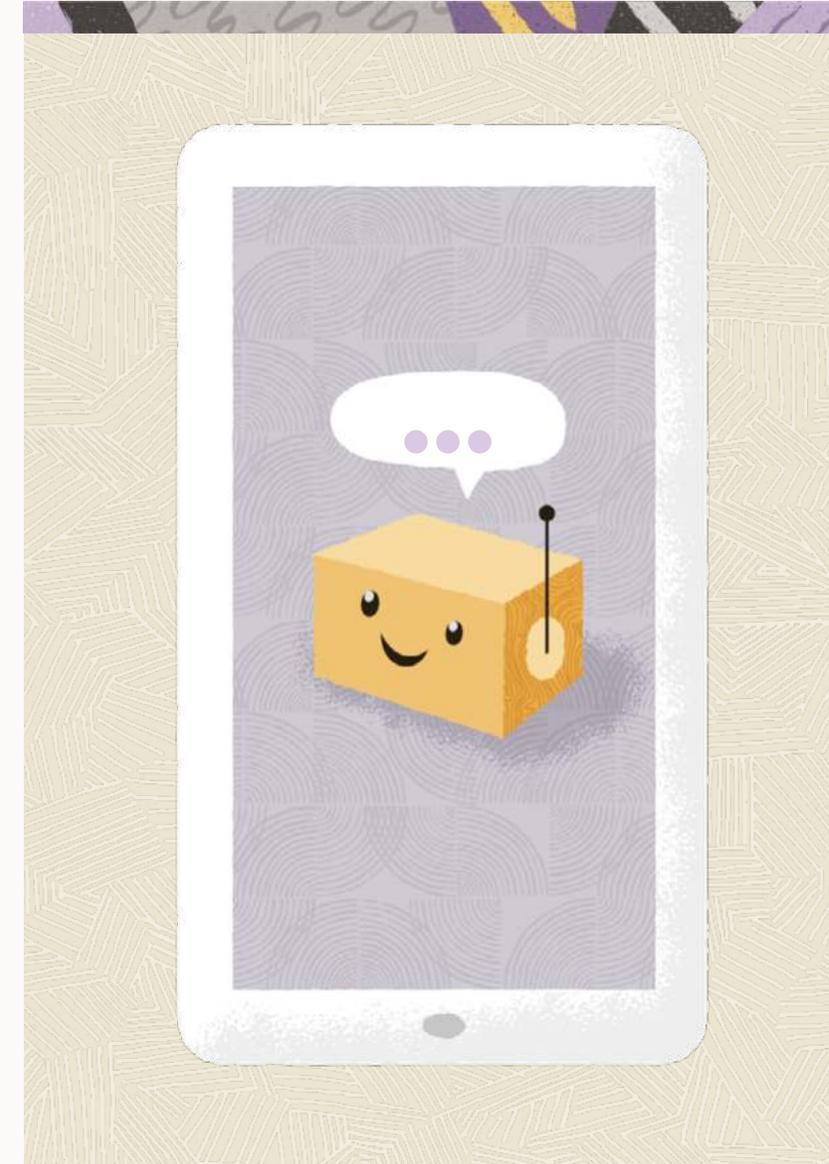
The basics of visual engagement

Part 2: Initiating visual engagement with your customers

Direct links on your website. Through easily visible direct links on your website, customers can start a text-based chat, voice, or video session. These options can be displayed all the time on every page, or you can limit the options to certain business hours or certain pages. You can also limit access to certain types of customers, such as those who have paid for premium support packages, loyalty rewards members, or high-value accounts.

Invitation after escalation. If a customer still has an unresolved issue after interacting with the first channel or channels, you can escalate their case to a deeper level of engagement, such as video or cobrowsing. Escalations can be raised in different ways, for example

- Automatically by a bot based on text the customer enters
- At the customer's request by clicking a button or entering the inquiry in a chat window
- By your agents, who may escalate the interaction from chat, voice, or phone to video or cobrowsing



The basics of visual engagement

Part 3: Business value

Cost savings. Visual engagement is an excellent way to improve efficiency, especially as it relates to two key metrics.

- First-call resolution (FCR): The percentage of customers that achieve resolution during their first contact, with no further action required
- Average handle time (AHT): The amount of time it takes to resolve an issue from start to finish, including hold time

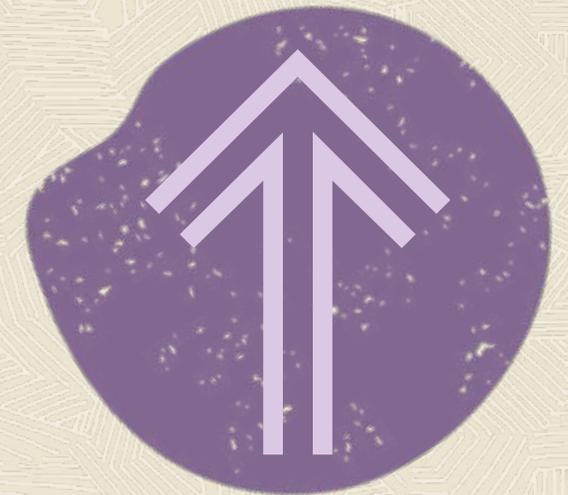
By being able to see problems faster and fix them then and there, you'll reduce your cost of service and time to serve.

Increased satisfaction. With visual engagement, you can provide the high-quality service your customers have come to expect. When customers have a convenient option to video chat or share their screen, it reduces frustration and keeps

them engaged, so you can solve their problem. Live, “face-to-face” interaction imparts a human element to your experience and builds connection to your brand. Driving higher customer satisfaction supports long-term customer loyalty. And over time, this will help your organization achieve a higher Net Promoter Score (NPS), which measures customer experience and predicts business growth.

NPS is calculated by asking customers, on a scale of 0 to 10, “How likely is it that you would recommend [brand] to a friend or colleague?”

Higher revenue. Visual engagement adds a human touch that will help you boost conversions and turn prospects into customers. You'll also be in a better position to increase upsell and cross-sell opportunities.



Your agents are the lifeblood of your service organization—literally. If they're not empowered to deliver a unique, hyper-convenient experience for customers, your journey to digital-first service will be stopped in its tracks.

In our final stretch, we'll delve into the most advanced element of digital-first service to explore how you can shift your strategy from reactive to predictive.



Reach the new frontier of proactive service management

Remember the last time a waiter refilled your coffee without you having to wave him down? Or your auto shop sent a text reminding you to get an oil change? These are examples of proactive service—anticipating customers’ needs before they ask for help. It’s the kind of service we’ve all come to expect.

27%

of consumers expect companies to provide proactive customer service experiences.²³



According to McKinsey, successful customer operations of the future will be simple, predictive, proactive, and responsive—all while reducing service costs by 25-50% for service-based industries such as banking and insurance.²⁴ But the truth is, it’s time for all industries to start thinking about proactive service. Because whoever your customers may be, they’ll compare your service to the best service experience they’ve ever had, and that often includes proactive service.

This guide will help you develop a strategy that balances the needs of your current service model with the opportunities of your proactive future.

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Proactive customer service, defined

Most people think of customer service as a business function for fixing problems, like when you receive a defective product and contact customer support for an exchange. This traditional model is known as reactive service. And, if it's the only type of service being offered, that can cause a host of problems.



Resolving problems takes longer if you're waiting for customers to alert you to issues, increasing cost and effort for your team.



When resources are tied up fielding a high volume of calls, there's nothing left to power innovation—and your company may lose its competitive edge.



Inefficient service leaves customers with products or services they can't use, leading to dissatisfaction, customer attrition, and reduced revenue and market share.

Proactive (or preemptive) service avoids these issues by anticipating and addressing customer needs before customers become aware of them. While proactive service experiences are common in consumer businesses—such as the attentive waiter—new technologies and customer expectations are making them relevant, and feasible, for B2B companies as well.



Proactive customer service, defined

Across B2C and B2B, there are three types of proactive service experiences.

1. **Human (person-to-person):** A service professional notices a future need and recommends it to a customer. For example, while activating high-speed internet, a technician suggests buying a new router that can achieve the connection speeds the customer has paid for.
2. **Technical (machine-to-person):** A technology provider preemptively addresses a technical issue. For instance, a B2B SaaS company releases a software update to fix a bug that users haven't yet noticed. Or, a smart commercial refrigerator registers a needed repair and communicates the data needed to make that repair via the Internet of Things (IoT).
3. **Customer-driven (person-to-business):** Customer support data preempts large-scale issues and needs. Let's say a manufacturer receives multiple complaints about an office coffeemaker malfunction. Instead of waiting for every customer who has purchased that machine to submit a ticket, support data triggers an alert to send replacement coffeemakers to everyone who ordered one.

When executed well, proactive service can elevate the customer experience and increase the efficiency of your service costs and processes.

- **Preventing downtime** increases confidence in your product and service offerings, building trust and loyalty
- **Increased dependability** makes customers more loyal and likely to advocate for your brand and buy more in the future
- **Preemptively resolving service issues** reduces customer frustration and inbound complaints, so your service reps can spend less time reacting and more time cross-selling and upselling to satisfied customers

In a world where customers already expect service to be timely, personal, and digitally powered, a proactive approach is the best way to achieve customer service innovation. Let's get started.

Proactivity in a time of need

COVID-19 presented a unique opportunity for proactive service: When the pandemic upended business processes worldwide, companies that offered proactive communication and service helped reassure customers and build trust. And now, research indicates that the global service industry is in the midst of a greater shift from reactive to proactive service.²⁵

Was your service delivery more reactive or more proactive prior to the pandemic?



Build your foundational strategy

With a thoughtful strategy in place, you'll be able to deliver proactive service that exceeds customer expectations while making the best use of your resources.

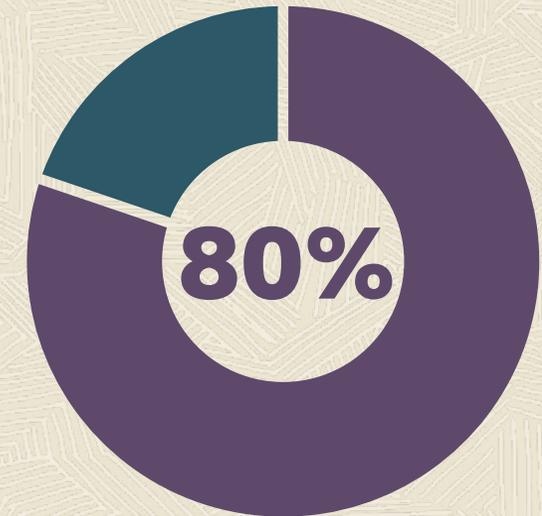
There are five key areas to consider as you develop a comprehensive service strategy. From customer expectations to technology innovation and leadership support, gathering the facts will help you create a vision that drives service success across your business.

1. Customer expectations

How well do you know your customers? Do they jump from online to offline across multiple channels when they are looking for help? Do you have a clear understanding of which customers are candidates for pro-active service? The truth is, all customers are different and while some people might appreciate proactive outreach to provide updates on minor issues, others may prefer to be contacted only on a need-to-know basis. Consider which situations truly merit proactive outreach to avoid annoying customers or sending so many minor updates that critical issues go unnoticed.

2. Employee skills

Proactive service requires a shift in how your organization and agents approach customer service. Being proactive involves more than outbound notifications or IoT asset monitoring. By reducing routine inbound calls, your agents will need to be able to solve more complex service requests. Do you have the right team in place to handle these types of issues? Or will you need to hire and train your agents to make the move from call-takers to experts?



According to Gartner, more than 80% of organizations use IoT, but less than one-third of chief information security officers feel confident in their ability to assess and mitigate the associated risks.²⁶

Build your foundational strategy

3. Business and financial goals

Some organizations have been asked to transform their service operations from a cost center to a profit center. Others have been told they need to improve operational efficiency to reduce staffing needs. And for some, it's both. To inform your strategy, consider all the ways proactive service can benefit your bottom line and ask yourself if the pressure to cut costs and increase revenue is likely to stay the same, increase, or decrease over time.

4. Innovation

For some businesses, building a proactive service model may require investment in technology, especially if your customers want more automation and channel support such as text or social media. It's also important to consider what technology and process innovations will increase productivity for your agents. Do you need to connect customer account information currently stored in separate systems such as financial and supply chain? And what about IoT? These questions are critical to improving customer experience and boosting your competitive edge.

5. Leadership champions

While some proactive service changes will just involve agents and line of business managers reporting on customer interaction trends, you may need data analytics to identify particular patterns or areas of friction along the customer journey that erode customer loyalty and increase churn. Depending on your current technologies, this could require a financial investment. Identify leadership "champions" to advocate for you across the organization and designate the funding you need.

Five steps to get started with proactive customer service

01 Find out when your customers want proactive service and when they don't

Ask your customers for feedback. Collect data on how often your current proactive tools are used. Monitor social media to see what customers are saying about your service model. And regularly review and analyze service tickets for proactive service opportunities. These insights will enhance your level of service, and the insights gained can help you streamline issue resolution to prevent customers from reactively making contact through more expensive channels.²⁷

02 Identify your technology silos

Is your commerce system connected to your service system? If so, an agent or digital assistant could proactively initiate a chat with a customer who's abandoned a high-value item in their cart, for example. If you have disconnected systems, work with your IT team to integrate your systems and channels to provide better customer service and also drive profit through more personalized cross-sell and upsell offers that demonstrate alignment of service and marketing efforts.

03 Consider investing in proactive service technologies

IoT and connected-device remote monitoring can reduce repair costs, improve efficiency, and boost customer retention. However, to get the full benefit from these technologies, you'll need to integrate data from all your service applications. Work with your IT team to explore machine learning (ML) and AI. In the world of field service routing and scheduling, ML-based algorithms can improve customer satisfaction with on-time arrivals, increased job completion rates, and fewer job cancellations.

Five steps to get started with proactive customer service

04 **Improve your self-service options**

To move away from reactive self-service, you'll need to address the reasons why customers use self-service in the first place. Often, they're looking for things such as delivery status, product information, or technician arrival times—and they'll contact your customer service department if they aren't able to find what they need. Give your customers self-service options such as easy-to-navigate knowledge articles or intelligent chat and advice automation solutions so they can resolve their issues without ever contacting an agent.

05 **Implement proactive communications**

Even if you don't have the resources for sophisticated tech innovations, you can still proactively communicate with customers. Whether they're looking for order status updates or help in emergency situations, sending emails, texts, or mailed information can put customers' minds at ease and relieve them from having to contact your customer service center.

Transform your customer relationships with proactive service

Proactive service is a powerful way to show your customers that you understand and appreciate them.

It also helps them get the most benefit out of your business, fostering strong, loyal customer relationships that are built on value. As you continue your journey, remember: **It pays to be proactive about your proactive service model.**

Proactive service is widely considered to be the next step in the evolution of customer service, and companies who make the shift first will have more of an opportunity to reap competitive benefits. Get ahead of the trend before your competitors become the disruptor.



By 2023, 30% of customer service organizations will deliver proactive customer services by using AI-enabled process orchestration and continuous intelligence.²⁸

Now that nearly every service organization delivers multi-channel, remote service, you need to take your transformation even further to differentiate your service experience. A shift to proactive service shows that you don't just know how to resolve customer requests—you have the expertise to see them coming before customers can themselves.

Finally, we'll explore how proactive maintenance can eliminate many reactive service requests.

Pillar 5 Resolve issues before they arise with proactive maintenance

Traditionally, resolving customer issues soon after they occur was considered the hallmark of excellent field service. But today, it requires more.

With proactive maintenance, your team can surpass expectations by identifying and addressing product or asset issues before a customer is even aware there's a problem. This helps decrease unscheduled downtime, equipment failure, and risks from operating faulty equipment. Plus, it keeps customers happy and makes them more loyal.

There are three types of proactive maintenance.

- 1. Predictive maintenance** analyzes sensor measurements and formulas to pinpoint future maintenance issues before they manifest
- 2. Condition-based maintenance** monitors performance metrics in real time and flags service needs when any metric reaches an unacceptable level
- 3. Scheduled maintenance** involves regular inspections or service work that's performed at a set interval or timeframe (for example, daily, weekly, monthly, or annually)

47%



47% of manufacturers still track maintenance schedules using in-house spreadsheets, while 46% still utilize clipboards to keep paper maintenance records.²⁹

Resolve issues before they arise with proactive maintenance

IoT is a big component of what makes proactive maintenance possible. Field service organizations can use data from connected devices to identify and diagnose issues and initiate service calls to address them. And since many products—from appliances to exercise equipment to medical devices—are connected today, proactive maintenance is an excellent opportunity to differentiate your business.

As service costs continue to rise and erode margins, connecting your supply chain to the service chain is critical to help improve inventory management. If you want to gain a competitive advantage while simultaneously lowering service costs and increasing revenue, it's time to consider proactive maintenance.

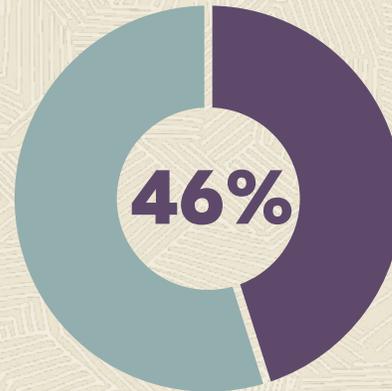


Why proactive service matters today

Proactive maintenance benefits customers, field service teams, and your business.

When a customer reports a service issue, they expect it to be addressed in a timely manner. But customers truly appreciate machinery and products that stay up and running without their intervention. Proactive maintenance delivers just that by preventing unexpected outages or product malfunctions. It also

- Reduces repair and replacement costs
- Enhances workplace safety
- Provides real-time data insights
- Extends the lifetime of the equipment



46% of service organizations are planning to introduce or reinvent a maintenance strategy to minimize asset downtime.³⁰



Why proactive service matters today

For businesses, implementing proactive maintenance will take planning and financial investment, but the benefits are worth it.

- **Reduced downtime with fewer malfunctions**
- **Improved equipment reliability and availability**
- **Lower long-term maintenance costs**
- **Fewer productivity and safety issues**
- **Increased equipment longevity**
- **Happier customers**

Proactive maintenance also opens the door to new revenue sources. Consistent uptime allows vendors to earn income from preventative services. They can also offer a service subscription program that generates predictable revenue versus fluctuating revenue associated with reactive maintenance.



60% of companies associate preventive maintenance with better productivity, and over 60% with decreased downtime and improved safety.³⁰

The basics of proactive maintenance

These fundamental concepts and tools help ensure effective proactive maintenance.



Field service management system:

Driven by predictive maintenance, this allows services and repairs to be scheduled, dispatched, and executed efficiently. Mobile applications enable predictive maintenance tasks to be completed with fewer errors. They may also provide more accurate data showing what actions were taken that would lead to more effective prescriptive maintenance.



Maintenance-as-a-Service (MaaS):

For smaller businesses that want to try the latest maintenance strategies without incurring a lot of debt, MaaS is the perfect solution. It provides maintenance services through a subscription model versus per incident.



Knowledgebase:

One of the best ways to provide product and service information for your customers and agents, a basic knowledgebase can include FAQs, manuals, and troubleshooting guides. More advanced knowledgebases are built around AI that can interact with user input using natural language search functionality that automatically interprets the nature of the question and responds with relevant information.



31% of companies outsource service operations because skilled individuals are hard to find.³¹

The basics of proactive maintenance

Let's take a look at some of the tools that make proactive maintenance possible.

- **Advanced equipment sensors** help with inventory planning, predicting disruptions, and identifying the root cause of equipment issues.
- **Data collection and analysis** provides accurate modeling and effective forecasting for predictive maintenance.
- **Digital twin simulators** use real-world data to create simulations that predict how a product will perform or show how a connected product is performing in real time.
- **Remote monitoring service** allows agents to resolve issues by sending commands directly to IoT-connected equipment and gives field service workers the information they need to resolve issues on the first visit.

- **Connected assets** prevent downtime by using IoT sensor data for real-time visibility and maintenance of machines, vehicles, and other assets.
- **Integration with service systems** connects maintenance and service management applications to optimize proactive maintenance scheduling.

Once you implement and execute proactive maintenance, it's important to clearly understand how it's performing. Here are some metrics frequently used to measure the performance of assets and field service operations.

- **Mean time to repair** measures the average time it takes to troubleshoot and repair failed equipment.
- **Mean time between failures** measures the average time between system breakdowns.
- **Overall equipment effectiveness** measures how effectively a piece of equipment is utilized.

- **Planned maintenance percentage** measures the percentage of maintenance hours devoted to planned maintenance activities versus unplanned.
- **Preventive maintenance compliance** measures the percentage of preventive maintenance tasks completed on schedule during a specified time period.

KPIs gauge what's working and what isn't, then help you course-correct when necessary. And, in the digital-first future of service, they'll help you understand how to take the lead.

In service, the way forward is digital-first

Service will never stop evolving.

Even if your organization has already undergone massive changes, now is not the time to slow down. As you continue your journey to deliver predictive, unique, hyper-convenient service, keep these key takeaways in mind.

Resilient service organizations win. Your service experience is your most direct connection to the lives of customers. When circumstances shift or uncertainty builds, that's when they'll need you the most. In the moments that matter, make sure you can deliver with a strong foundation of digital service and flexible options like guided self-service and chat.

Agents must be empowered to excel. Like the customers they serve, service employees today have countless options of companies to work with. And as self-service options and digital efficiency shift agents' roles from question-answerers to expert advisors, it's never been more important to support your team. Invest in your agent experience and equip them with capabilities like visual engagement to ensure they can deliver the service customers expect.

Trust and loyalty don't come free. It's easier than ever for customers to switch brands, and one negative experience can be enough to push them away. A unique, hyper-convenient, one-to-one service experience can be the differentiator that keeps customers engaged.

Customers want choices, not responsibility. Customers expect to be able to engage with service on their terms—but that doesn't mean they want to be responsible for raising every issue. Take a proactive stance to minimize customer effort within the service experience, predicting and resolving issues before they arise.



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- Service A/B testing
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- IOT asset monitoring
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- Forecasting and capacity planning
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Learn more about proactive service with **Oracle.**

Go

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