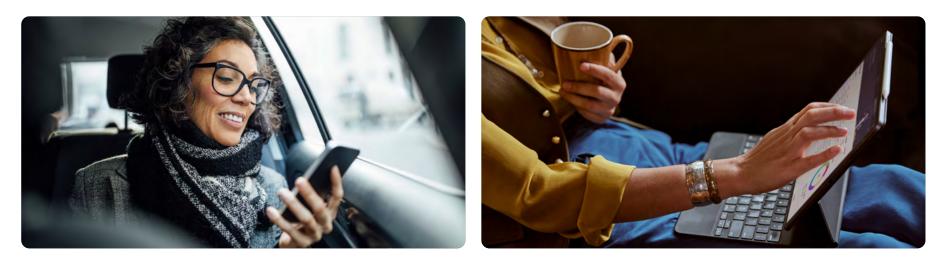# The case for proactive customer service

Five capabilities to intelligently prevent disruption and provide consistent service experiences

Introduction

When products have problems or services go down, customer confidence in a brand's ability to deliver on its promise of satisfactory service is weakened. Customers expect that incidents, outages and disruptions will be resolved quickly once the issues have been raised with the service provider. This traditional customer service model of fixing problems as, or after, they occur is known as reactive service, and soon it could be considered an indication of a subpar customers experience. Research from Accenture reveals that 64% of consumers globally wish companies would respond faster to meet their changing needs[1]. You might ask 'What could be a faster response than restoring service after an outage, or fixing a problem once it happens?' The answer is to solve a problem before it even happens, by embracing a proactive approach to customer service.

Proactive service helps reduce contact center volumes and create a more frictionless customer experience and drive customer loyalty, but before you can switch to a proactive service model you will need the five foundational capabilities in place:

1. Identifying what customers have purchased and use

2. Monitoring the health of your products and services

3. Pre-emptively informing customers of service events and solutions to problems

4. Efficiently managing issue resolution across your organization

5. Constantly identifying new ways to improve service quality

Let's look at each to understand how they will act as a foundation to help you proactively address issues to meet your customers' expectations and deliver on your service promise.

[1] The human paradox: From customer centricity to life centricity, Accenture 2022

1 Identify what customers have purchased and use

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

Know your install base

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

This level of detail can make it easier to uncover trends and root causes that can help head off potential issues. Not only does this lay the foundation for efficient outage tracking, it also helps you deliver blanket and targeted communications to the people that need to know about an issue relevant to their case.

2 Monitor the health of your products and services

By continuously monitoring the health of products and services, it is easier to identify potential trends and early warning signs that can enable the prediction and potential resolution of issues before they occur.

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

Avoid bottlenecks and downtime

The more information collected to help monitor the health of your products and services, the better. Often this information comes directly from the product and service teams themselves, but it may also originate from front-line customer service teams, the website, customer portal, or any number of customer touchpoints. The key is to ensure everything is connected, via a single system of record, and that install base data is constantly analyzed to extract meaningful insights and trends that indicated a current or developing problem. This will help you get ahead of concerns, reduce the number of inbound customer calls and customer-reported cases, and take pre-emptive measures to lessen the impact and maybe even eliminate an issue entirely.

CUSTOMER EXAMPLE

ROGERS.

41% Reduction in daily case volumes

19% Reduction in inbound calls

Rogers Communications is a leading telecommunications and media company in Canada, that provides wireless, residential services, sports, and media to Canadians and Canadian businesses. Rogers for Business is a unit in the company that supplies small, medium, large, and public sector organizations with enterprise-grade solutions and technology services to support their connectivity and digital needs. ServiceNow has given Rogers for Business the capability to proactively monitor the performance of its services, with incidents auto generated in ServiceNow if quality drops below pre-set thresholds. This enables technical teams to assess, troubleshoot, and proactively engage with customers from a position of informed confidence.

Now, even minor issues can be identified and resolved at speed, while data analytics, customer health checks, and intuitive dashboards are prompting swift and targeted actions that maintain high service standards. This is a capability that's especially crucial for essential public health and emergency service providers.

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We have been able to tighten the calibration of our performance monitoring thresholds to such a degree that we are now resolving minor degradations before they become out-of-service issues, and in effect, we are now operating much more like a preventative service organization."

Scott Thomson, Vice President for Technical Customer Service, Rogers for Business

3 Pre-emptively inform customers of service events and solutions to problems

Being able to tell customers an issue is fixed, or is in the process of being fixed, ahead of time, goes a long way towards building confidence in your brand and loyalty to your products and services. The same can be said about communicating potential outages, something you can get ahead of when you have monitoring and predictive analytical capabilities at your disposal.

To deliver an even greater customer experience, you can introduce a self-service element to your proactive service approach. You can use an auto response tool on your digital service touchpoints, such as your website and social media platforms, to deliver incident-relevant knowledge articles to enable your customers to self-troubleshoot. If the customer still needs assistance they can be directed to a support agent.

Avoid bottlenecks and downtime

The availability of self-service options is becoming increasingly important to new generations of customers. Furthermore, research shows that if customers can't get the knowledge they need from your website about your products they're happy to find it elsewhere. According to research from Gartner, younger generations are more likely to start their self-serve journeys outside company-owned channels, with 52% of millennials and 44% of Gen Z customers saying they have as much confidence in noncompany guidance as they do in customer service guidance[2].

Pre-emptively keeping your customers informed, with targeted communications on the status of the issue's resolution, means they don't have to waste time searching for a status update. Notifying them when it's time to schedule maintenance or update their service can also help extend the life and value of their purchase.

EXAMPLE

Low water warning

A field technician working for a water utilities company detects pipe degradation during a routine maintenance check. He reports back to head office that the water will have to be redirected to secondary pipes during the replacement process. This could leave some homes without water for several hours on the day of the repair.

The technician can initiate a case that triggers a notification for the head office to verify his assessment and sanction the future repair. Once this is authorized and a repair is planned a major case can be triggered via the customer service management team that will help identify and pre-emptively warn, affected customers of a possible reduction in water service to their home during maintenance time.

The communication to customers will include a link to a customer service portal that provides status repair information and links to knowledge articles that advise on pre-service preparation for faucets and appliances that use water.

If customers missed the targeted communications and contact customer service, they can be served by ServiceNow® Auto Response or ServiceNow® Virtual Agents which can be programmed to deliver information to customers affected by the outage.

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4 Efficiently manage issue resolution across your organization

Information and organizational silos must be eliminated to ensure front-, middle- and back-office employees and field service teams can work as one to detect and resolve issues quickly and efficiently. To be proactive, all employees in a position to discover an issue affecting customers—network operations, field service technicians, customer service agents— need to be empowered to trigger a case the moment a potential issue is detected and have full visibility into its resolution. Case management and efficient workflows enable this, ensuring the appropriate details are captured and the right resources are marshalled to tackle problems, so they can be resolved possibly before customers even experience them.

A single system of action

Steps can be automatically routed (in sequence or in parallel) to the appropriate people and teams to ensure no time is lost and everyone is focused on making progress. Status can be tracked by everyone, so delays or roadblocks can be uncovered and addressed. If a problem can impact multiple customers, cases can be proactively created for each individual customer and then managed as one. This streamlines the tracking of all interactions, activities, and relevant information (e.g., account information, product and asset information, service contracts, entitlement details, and service level agreements) for the issue at large. There is no need to wait for customers to report or even experience the issue. It can be resolved efficiently and permanently for everyone, so it doesn't seriously impact anyone.

CUSTOMER EXAMPLE

BanQsoft

Faster customer resolution times	Successful software roll-outs	Increased job satisfaction

Banqsoft is a leading provider of financial software in the Nordics, offering technology solutions to more than 60 retail banks, consumer finance providers, and asset finance companies.

Banqsoft selected ServiceNow® IT Service Management as its new service management platform, recognising that ServiceNow goes beyond incident management to support many aspects of customer service delivery.

Banqsoft customers now submit incidents through a self-service portal. The portal gathers all of the required details up front, using intelligent rules to ensure all mandatory information is captured.

ServiceNow® Problem Management will let Banqsoft easily identify incidents with the same root cause and take action to prevent these problems from recurring. Banqsoft is also planning to introduce ServiceNow® Customer Service Management and anticipates it will deliver significant commercial value.

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With ServiceNow CSM, we will remove any confusion over what is an incident, change, or service request. This will significantly improve not only our processes but our commercial approach."

Mikael Folke, Contract Manager and Technical Pre-Sale, Banqsoft

servicenow

5 Constantly identify new ways to improve service quality

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

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

Reduce future case volume, by identifying next-best workflows to automate and by catching potential issues at the source before they turn into larger problems affecting customers. Automation can free up agents to work on more critical customer service matters, leading to improved employee satisfaction. With strategic automation, front-line agents feel more empowered to work on tasks that matter, view their job as interesting and challenging, and worry significantly less about their future job prospects[3].

Intelligent technology analyzes system data to spot developing trends— identifying clusters of topics, actions, or past behavior that could benefit from automation—to help the organization stay ahead of the curve.

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

Optimize schedules, so agents are used wisely. Varied data, such as agent availability, skill set, number of cases solved, workload, cancellations, and more, can be analyzed and used to support optimal outcomes, with respect to workforce and task assignments.

This data can also surface exception cases for resolution when necessary.

Analytics can identify ways to improve customer service, optimize resources, and minimize costs.

What does proactive customer service look like in action?

Proactive customer service doesn't mean being able to look into the future, it's about improving the ways that you can work smarter to better help your customers beyond responding to tickets. Examples include:

- Leveraging analytics, predictive intelligence, and machine learning to avoid potential bottlenecks in service

- Triggering case workflows and notifying customers of any issues before they are aware of a disruption, and deliver information about service restoration timelines

- Using major issue management for issues involving multiple customers and identify impacted customers who have not yet reported an issue and proactively create cases for these customers

- Giving customers access to self-service knowledge articles and virtual chatbots so that they can attempt to resolve any issue themselves before case escalation to a human agent is required

- Equipping call center agents, field service technicians and the customer with a single source, shared customer history to improve the likeliness of first-time fix rate success

Discover ServiceNow® Customer Service Management

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

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

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

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

Learn More

Resources

Ebook: 2022 Book of Knowledge for CX

Ebook: Effortless customer experience