



# Putting AI, Automation, and Data to Work

Actionable insights for better customer service

**Einstein Alerts**

Customer's subscription is up for renewal soon!



**Call Controls** Connected

+1 (521) 392-9821      00:00:23

Transcription available

End Call



Customers are the most important part of any business. And customers today aren't just looking for stellar products and offerings, they also want an amazing service experience.

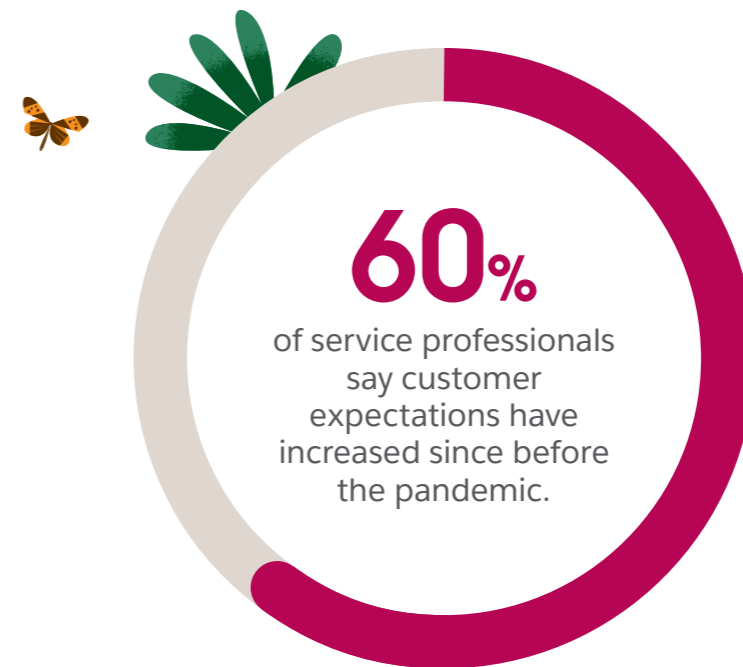
The stakes are high: **48%** of customers who switched brands recently say they did so for better customer service and **94%** say good customer service makes them more likely to make another purchase\*. Buyers today want personalized attention and they want their issues resolved quickly – with **83%** of buyers expecting to solve complex problems by talking to one person.\*

So what's getting in the way? Service departments are dealing with competing priorities: rapidly increasing customer expectations around personalized service, lack of insights, and tighter budgets.

How do you get there? By putting your customer at the center of every decision. It's about meeting your customer where they are – on their terms, with their preferences, and their technology. It's about making customer-centric processes and business models the norm to make your customer experience better.

With the right insights and technology, any company can be a customer company.

\*Salesforce [State of the Connected Customer](#) May 2022



Customers who agree with the following:



Source: Salesforce [State of the Connected Customer](#) May 2022



For customer service leaders, AI and automation are no longer ‘nice to have.’ For service organizations to balance dueling priorities around customer expectations and cost reduction, AI and automation have become a new imperative. Modern technology, like generative AI, has the potential to rapidly grow and scale service, while improving the customer experience.

Using data from our largest Service survey yet (8,050 service professionals across 36 countries), conducted for [the 5th State of Service Report](#), this guide explores the real impact automation and AI are having on customer service and why they both have the ingredients to get service orgs out of the “connect-better-spend-less” conundrum.





We'll look at:

**1. How automation fosters efficient customer service**

Learn how automation reduces costs and boosts efficiency by eliminating repetitive, time-consuming tasks and streamlining business processes.

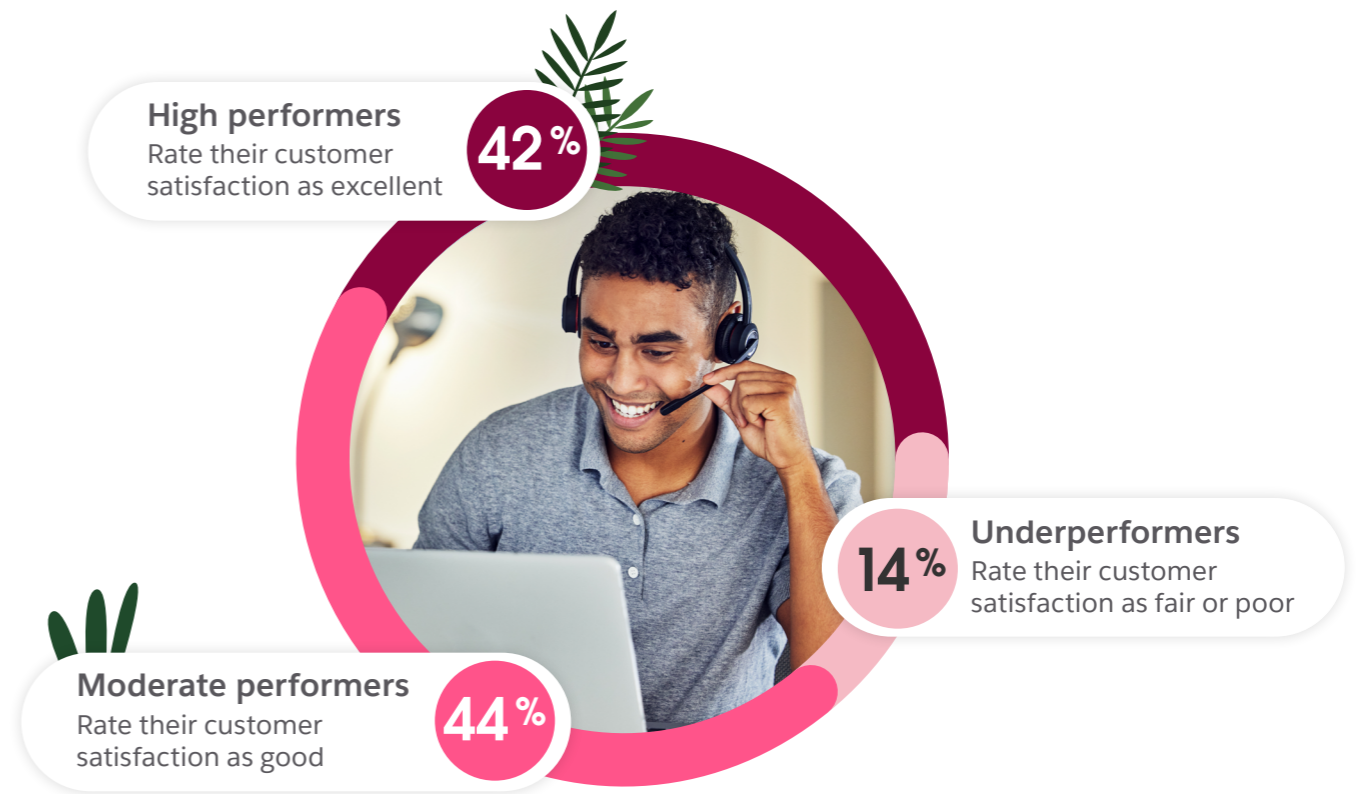
**2. The productivity benefits of AI for service teams**

Discover how AI supercharges productivity for service teams by offering intelligent, data-driven recommendations that help agents stay focused on the customer.

**3. How automation and AI enable personalized service via a unified view of the customer**

See what a unified view is, how it helps service departments scale, and why high-performing service organizations are using it.


**Service performance levels included in the Salesforce State of Service Report:**





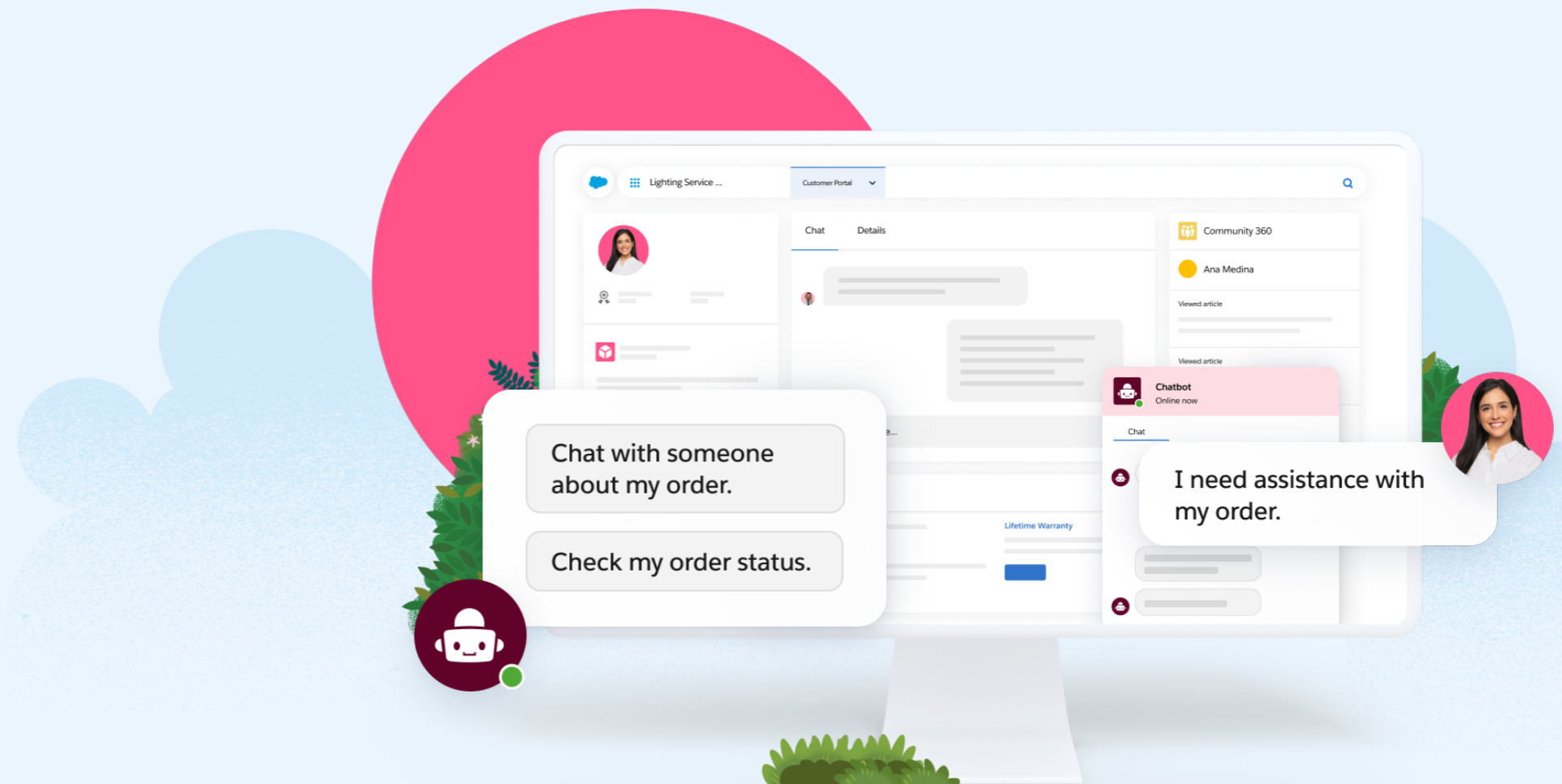


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CHAPTER 01

# Automation Nation? Our Findings Give Two Thumbs Up



# 01 The Automation Advantage

Let’s start with a fundamental question about something many assume is true: Is automation really taking over? Maybe not yet, but given its numerous benefits, it’s clearly becoming an increasingly important part of the customer service playbook, especially for high-performing service organizations.

Fifty-eight percent of service decision makers report using automation. And high performers are even more likely to use automation (65%), especially when compared to underperforming competition (41%).

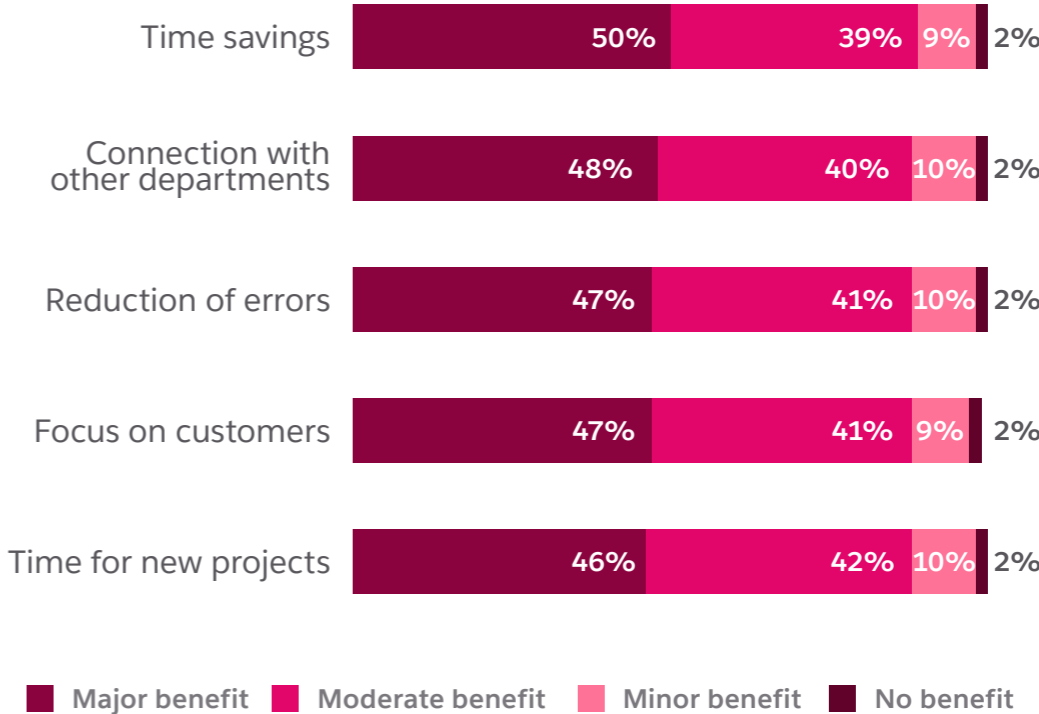
Among service professionals at organizations that use automation, half report time savings as a major benefit of automation. Nearly half report improved connection with other departments, reduction of errors, a focus on customers, and time for new projects as major benefits.

Notice what all these benefits have in common: efficiency. The more efficient your operations, the better you serve your customers and the easier it is to scale that great service.

This is what we call “Shift to Scale”— moving high-touch, high-cost interactions to low- or no-touch channels that reduce costs, cut response times, and allow service teams to focus on what matters most: delivering service customers love. Even a seemingly minor boost in efficiency, like moving interactions to a slightly lower-touch service channel, can mean huge savings for high-volume contact centers.

Automation and AI are the underpinning of shifting to scale.

## Reported benefits of automation:



Base: Service professionals at organizations using automation





# 01 A Customer Service Journey with Automation

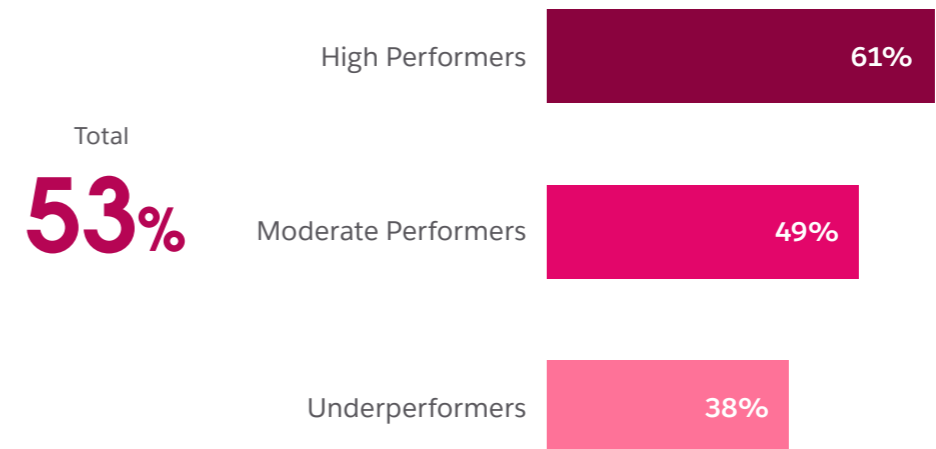
Shifting to scale is all about creating efficiencies by automating manual tasks and processes. Even when customer concerns are more complex and can't easily be shifted to low-touch channels, automation can streamline your agents' workflow.

Take digital transcription, for example. **Eighty-one percent** of service professionals say the phone is a preferred channel for complex issues, and **53%** of service organizations have automated digital transcription of phone conversations.

Automating digital transcription means less note-taking and flipping between screens for your agents, who can stay in their digital console to view everything they need to help your customers.

## The phone evolves, but remains a critical service channel:

Service organizations with automated digital transcription of phone conversations:



To paint a picture of how automation helps scale customer service, we'll tell a story about a customer, Ana.

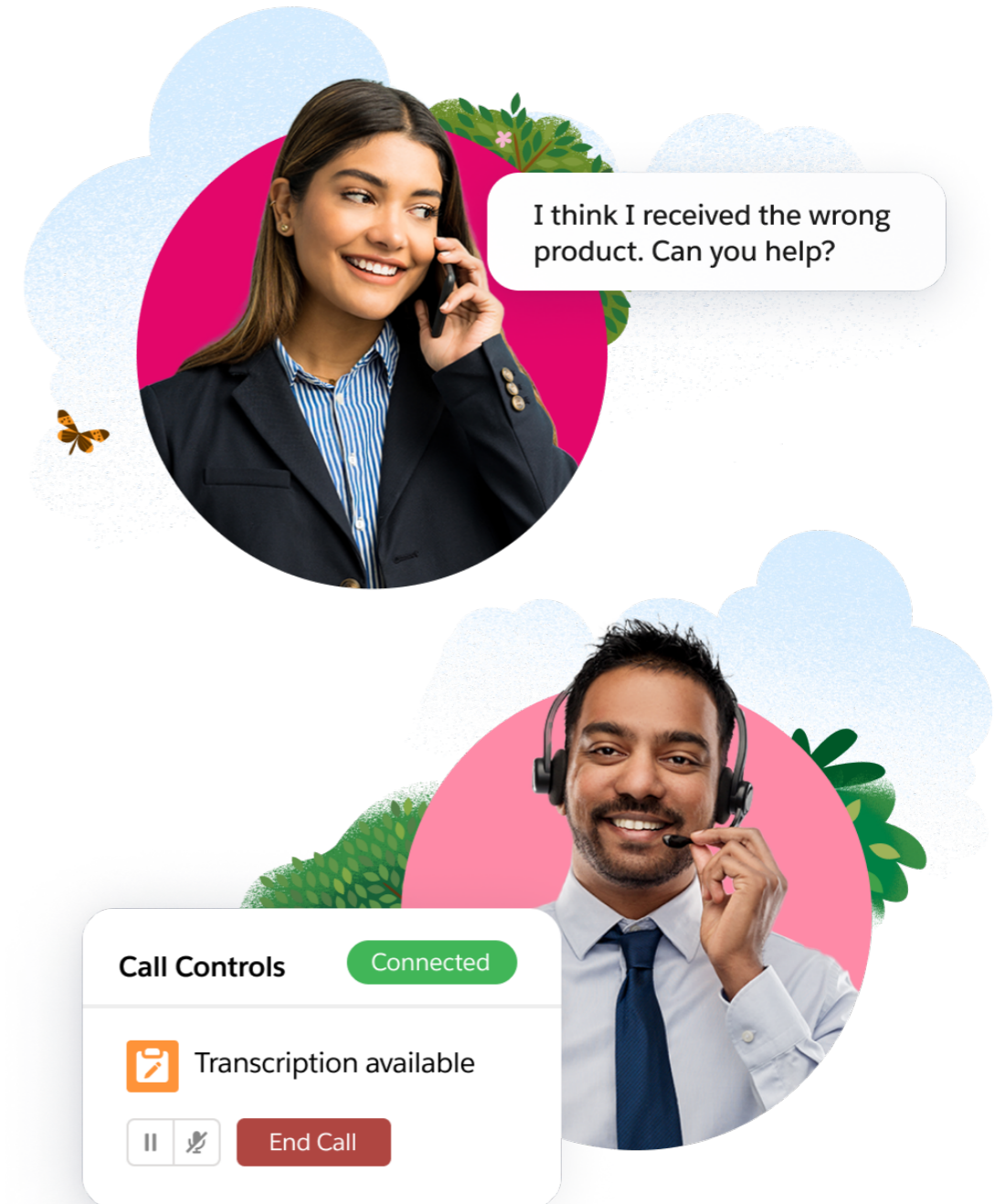
Ana's a repeat customer of Big Commercial Fixtures, a lighting company in her city. She recently ordered new track lighting for one of the offices she manages. It arrived on time – awesome! But when her maintenance crew began the install, they discovered the tracks weren't wired to Ana's order specification. Oh, no!

Ana dials Big Commercial Fixtures' customer service line. Ashwin, a customer service agent and lighting specialist, picks up the call, which was automatically routed to him because of his relevant experience to Ana's case. While Ana explains her issue, Ashwin uses automated digital transcription to record their conversation, so he's able to give her his full attention instead of taking notes.

Once Ana confirmed her phone number associated with the account, all of her relevant account and order history was displayed in Ashwin's agent console. Ashwin reorders Ana's lighting by following a step-by-step workflow that popped up when he selected "wrong product sent" as the reason for Ana's call.

Ana hangs up, satisfied with the quick call... but she forgot to write down the delivery date. Ana heads to Big Commercial Fixtures' mobile website, where a chatbot asks if it can help. Ana types, "When will my order arrive?" The bot recognizes Ana since she's logged in, and surfaces the estimated delivery date of her replacement lighting.

Ana's story – and Ashwin's – aren't unique. Service leaders are finding that automation increases customer satisfaction and service efficiency and are implementing it at scale. This all adds up to less time doing rote work and more time helping the customer with critical issues that require a more personal touch.





CHAPTER 02

# How AI Advances Productivity Across the Service Department

I received my smart home device but need help connecting my lighting.

Start Chat

Write Email

Einstein Recommendation 

Smart Home Setup 





# 02 A New World for Service

Generative AI might seem like science fiction, but it has the potential to change the way we work for the better, and this includes service.

Today, AI is increasingly part of customer service toolkits. The share of service decision makers who report using AI has increased by 88% since 2020, from 24% of respondents to 45%.

That’s a huge increase, and it’s clear why this is happening: AI boosts productivity, which then enables more personalized customer experiences. Here’s how that works:

Artificial intelligence reduces your agents’ cognitive load. Swiveling back and forth between systems and screens to view customer history, find the right knowledge article, and type responses is a heavy lift – and can easily be prone to errors. AI can supply agents with intelligent recommendations, across knowledge bases, conversational insights, and customer data.

That keeps agents focused on your customer instead of on trying to piece together data points about who they’re speaking with and how to help them.

And that’s just one version of productivity that AI can support. Self-service websites and chatbots, when powered by AI, surface better recommendations to your customers, reducing effort and deflecting simple cases before they unnecessarily reach an agent. That also counts as productivity, but it’s scaled to benefit your entire service center.



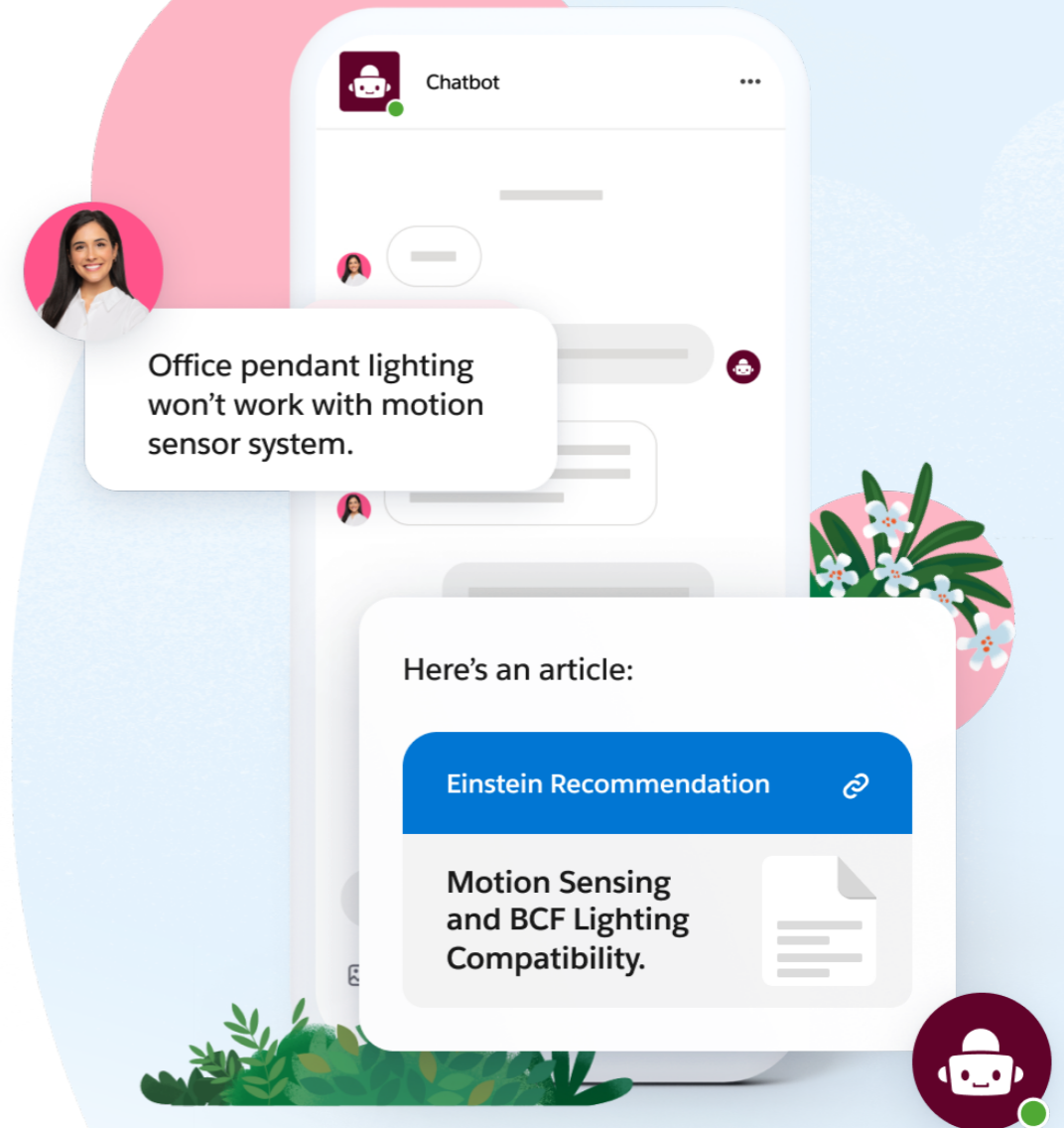
For an example, let's check on Ana as she returns to Big Commercial Fixtures' website with a new problem.

Last month, Ana ordered pendant lighting for one of the office buildings she manages. The lamps look great in the kitchens! The only problem is, they aren't working with the motion-sensor system that the office uses to save energy.

Ana logs on to Big Commercial Fixtures' website and is automatically pinged by a chatbot that says it's there to help. Ana types, "Office pendant lighting won't work with motion sensor system." Since this chatbot is powered by AI, it uses natural language processing to search for relevant knowledge articles within BCF's knowledge base. The bot finds the perfect one: It's an article where Ana can search for her product model number and get specific instructions on how to connect her lights to motion sensors. Spot-on! Ana emails the article to her maintenance team.

Notice who's missing here? Ashwin! Instead of spending time chatting with Ana, he just helped a valuable customer triage a complex issue, ensuring one of their key accounts stayed with Big Commercial Fixtures. Imagine 100s or 1,000s of agents each focusing on higher impact activities instead of handling easy but time-consuming cases, thanks to artificial intelligence. That's productivity at scale.

Once again, Ana's story – and Ashwin's time savings – don't have to be unique. Here's how AI enables productive customer service organizations that deliver attentive, proactive service with less effort to build loyalty and keep your customers happy.



## AI improves conversations in real time

AI-driven workflows that are built right into agents' workspaces can provide automatic recommendations to help them troubleshoot issues for customers – such as automatically checking a customer's warranty, or providing a relevant knowledge article. Generative AI in particular can write up responses for agents to review, customize, and send to customers, based on data from CRM systems and knowledge bases.

## Chatbots use AI to add a human touch

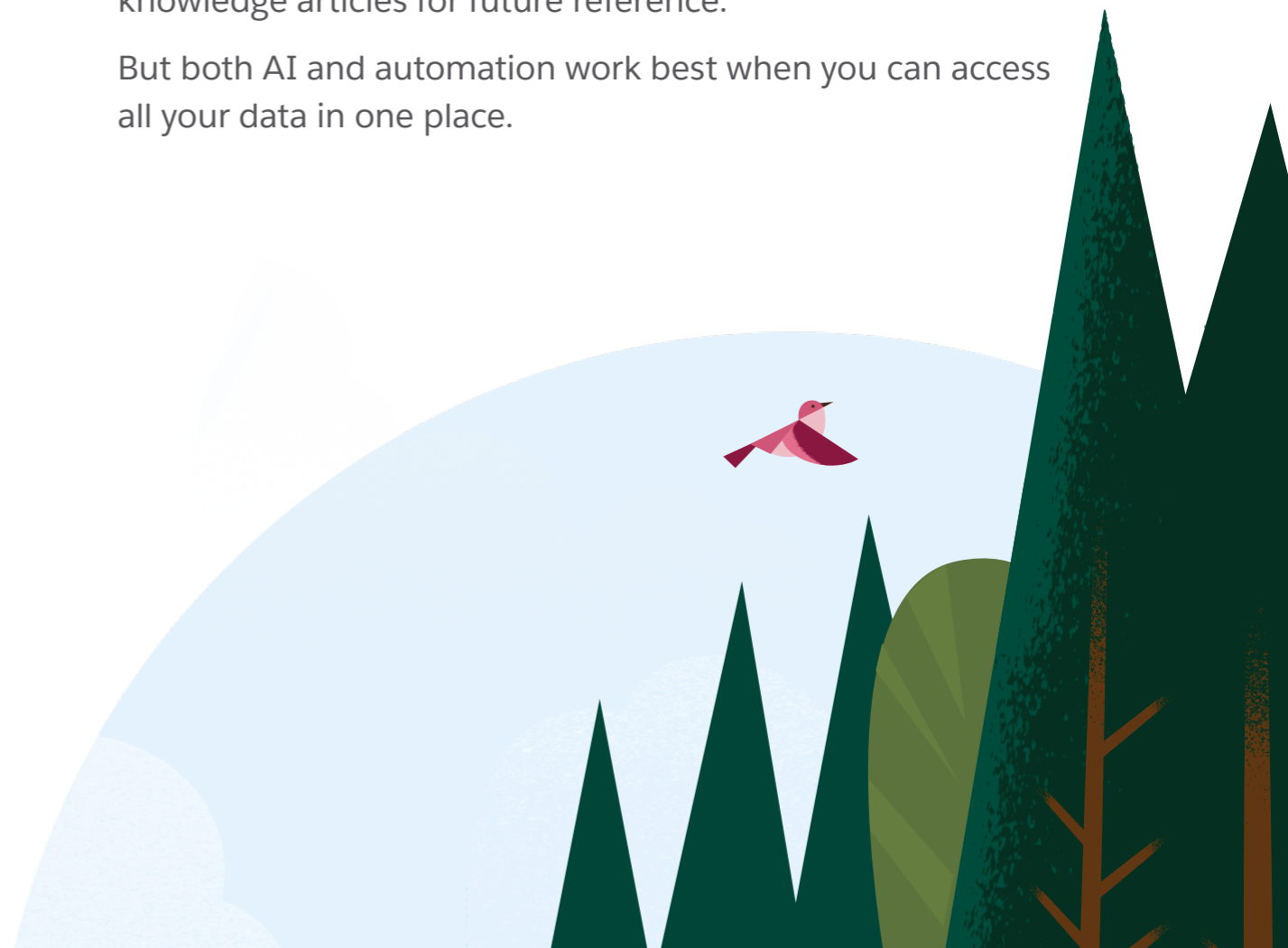
Even in no-touch channels like chatbots and self-service, AI adds a personalized, attentive dimension to customer service – as with Ana's example. When a customer initiates a conversation with your chatbot, the bot uses artificial intelligence to populate important information – such as the customer's name, location, account type, and preferred language. Natural language processing can help the customer take action on orders, claims, and more in real time. Automated workflows even use AI to route the chat to an

agent with the right expertise, once the customer issue is qualified and the customer requests escalation. And now, with the innovation of generative AI, organizations can build and deploy intelligent bots (with your brand's personality included) within minutes.

## AI drives value even after “case closed”

Your customers' contracts, warranties, purchase history, and marketing data are all data that AI can use to surface the next best actions for agents to take with your customers to drive value – even after the service engagement is over. For instance, AI can prompt agents to let customers know that it's almost time to renew their subscription or that a product upgrade or discount is available if they act quickly. Generative AI can even summarize customer conversations and produce knowledge articles for future reference.

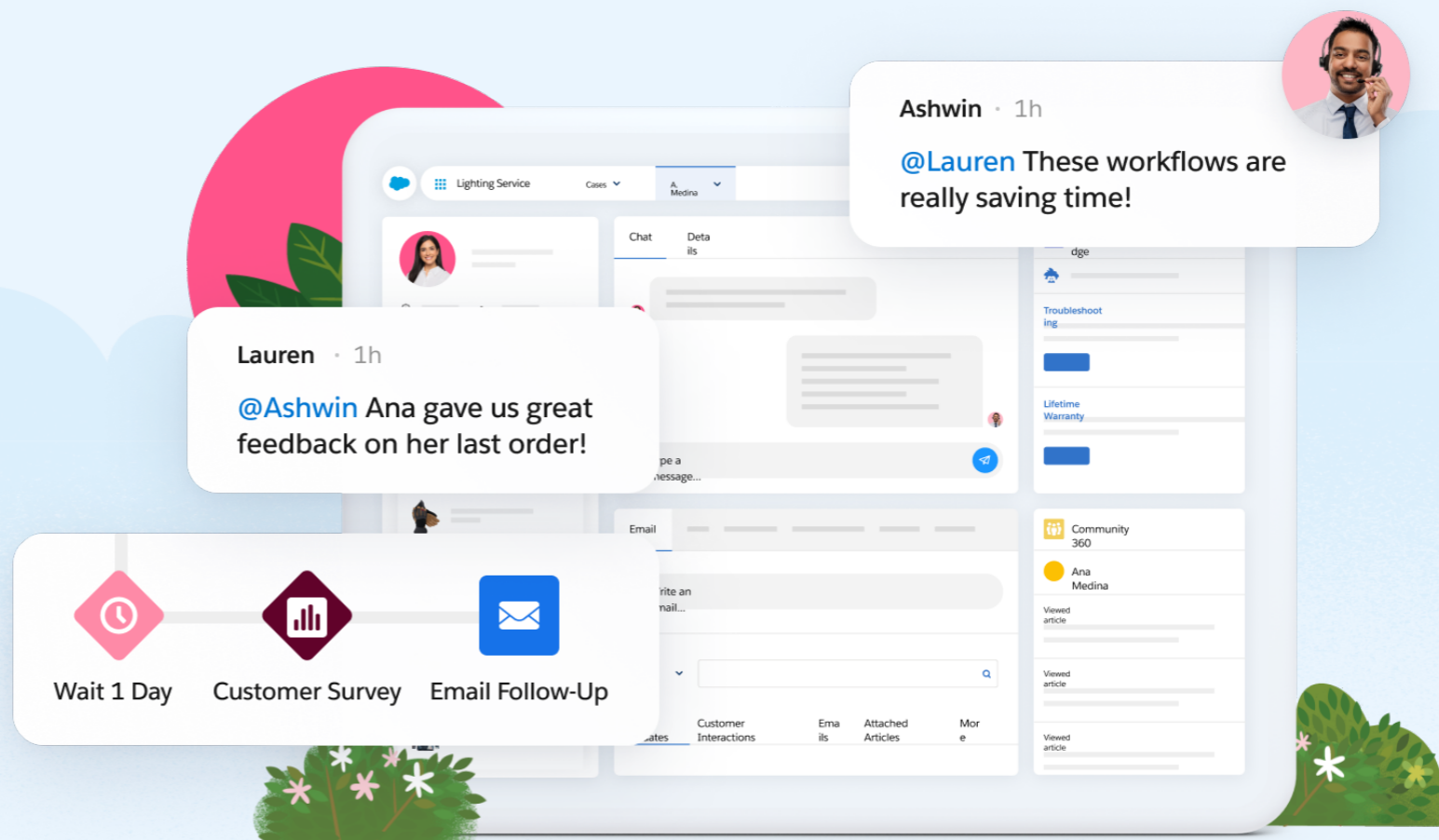
But both AI and automation work best when you can access all your data in one place.





CHAPTER 03

# Lay the Groundwork For Personalized Service with a Unified View



03

# Context Is Key

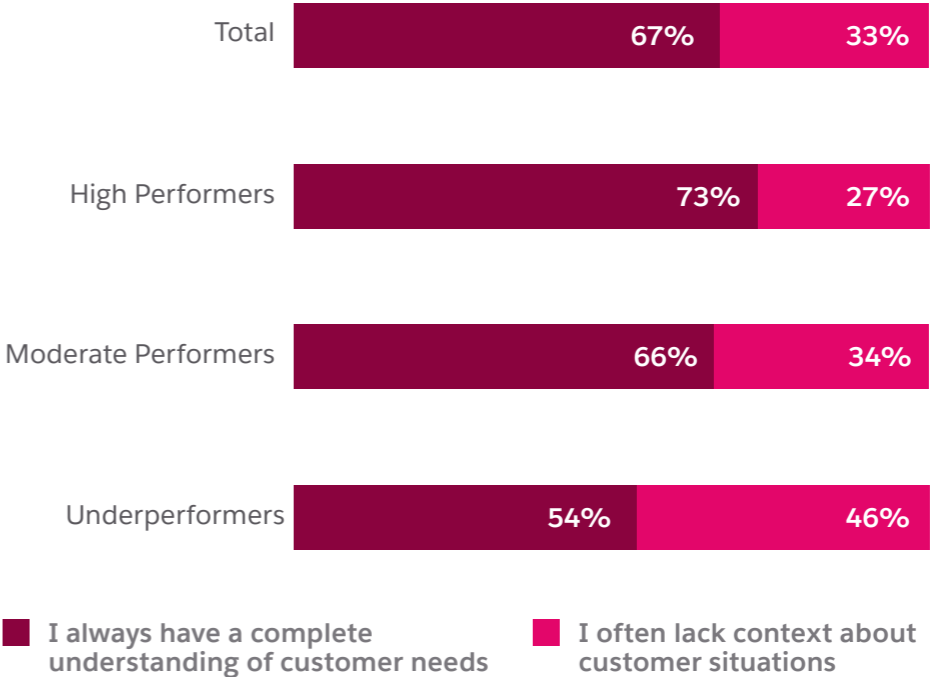
When we talk about connecting better, spending less, it’s hard not to talk about context – that is, having a full picture of the customer in order to better serve them.

For AI and automation to truly work their magic, they need to pull data from all corners of your business and every possible customer interaction. That means your customer data streams from sales, marketing, service, and ecommerce should live on the same data platform, in real time. But for many service professionals, the state of customer data leaves much to be desired.

**Thirty-three percent of agents say they often lack context about customer situations.** Lacking a complete, accessible view of the customer is even more common for underperforming service teams.

## Service performance tracks agent empowerment

Agents who agree with the following:



The culprit? Not having a unified view of the customer: only **38%** of service professionals say all departments use the same CRM software.

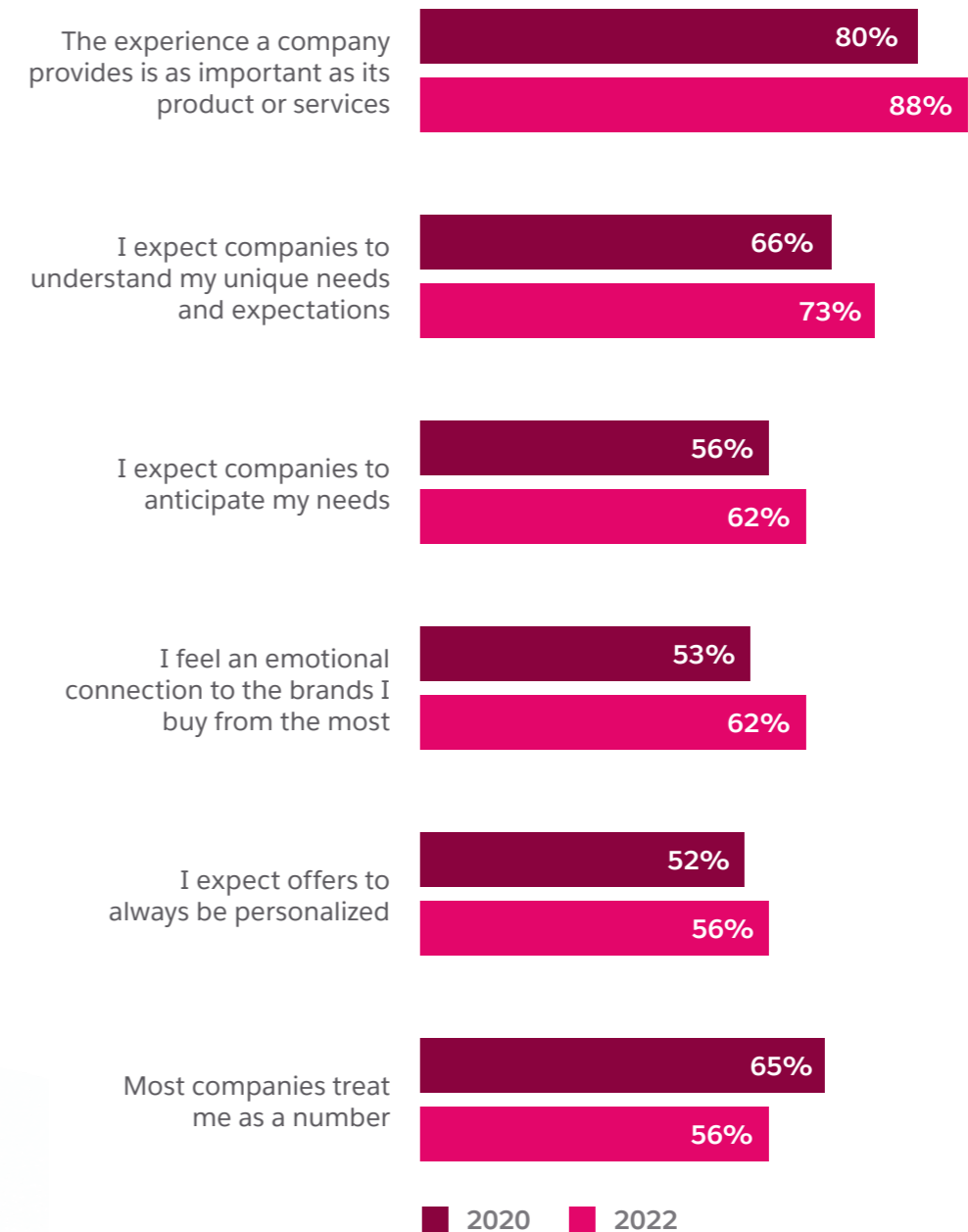
What's the benefit of having a single trusted data platform across service, sales, and marketing?

It syncs your customer data and enables personalized, responsive service. Your automated and AI-powered tools have more data to draw on, and your service team has more insight into ecommerce, marketing, sales, and interactions across all platforms. For example, a technology company using a single trusted platform can create an automated workflow to halt marketing communications and notify the right account team when a customer experiences a major incident.

The pressure is on from customers to act on personalization. Data shows that their standards are high and their needs are real.

## Expectations for personalization continue to climb

Customers who agree with the following:



Source: Salesforce [State of the Connected Customer](#) May 2022



# How to Get Started

Personalized customer service sounds incredible, but how do you get to that unified view of your customer data in order to make it happen? Here are three top tips for success:

## 1 Build a case for a unified data strategy

Use data to show the bottom-line value of having a complete customer view and sell your stakeholders on it. How much time would your service agents save if AI and automation achieved their full potential?

Also try putting it into the perspective of the customer experience: Your marketing team can pause marketing efforts while a customer has an open service case; your service agents can make product recommendations based on prior purchases. These types of interactions are what make your customer experiences more personalized and empathetic, which ultimately drives loyalty and revenue.

## 2 Partner with IT to make a recommendation

Service-IT technology decision-making relationships are declining:

- 37% of service orgs today say IT is the sole decision-maker, compared to 25% in 2020.
- 49% of service teams have maintained their partnership, down from 68% in 2020.

Why is this significant?

77% of service decision-makers who partner with IT say it results in cost-savings and 79% say it results in faster time to market for new tech solutions.

Investing in your service-IT partnership will ultimately make your technology recommendation and implementation more successful – across automation, AI, and customer data.

## 3 Know and track your key metrics

When thinking about unified data as fuel for excellent AI and automation programs, you'll want to measure the efficacy of those workflows in the service department to know how well you're doing now and where a unified customer data strategy will help your service team improve.

Specifically, you should be monitoring your:

- CSAT score
- Customer retention
- Customer effort
- Case deflection percentage
- First call resolution

Remember, your goal is to improve the customer experience while increasing your service efficiency. Tracking metrics lets you know if you're on your way to this goal or veering off track.



## 03

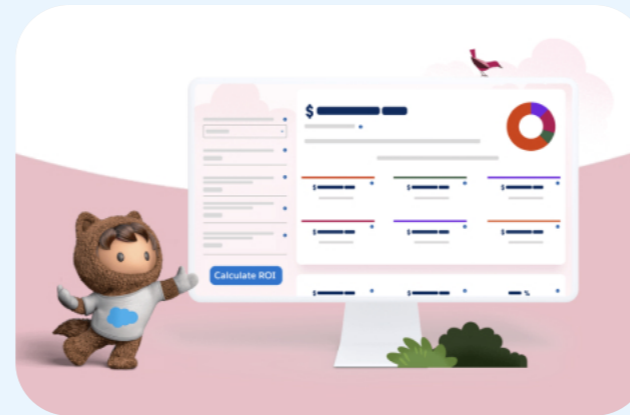
## How to Get Started

Everyone wins with AI and automation.

As businesses shift to scale, moving from high-touch service interactions to no/low-touch service, things get easier for your agents and your customers. AI and automation tools make processes more efficient, help agents get the right customer insights, and save your organization money – all while providing your customers with an amazing service experience.

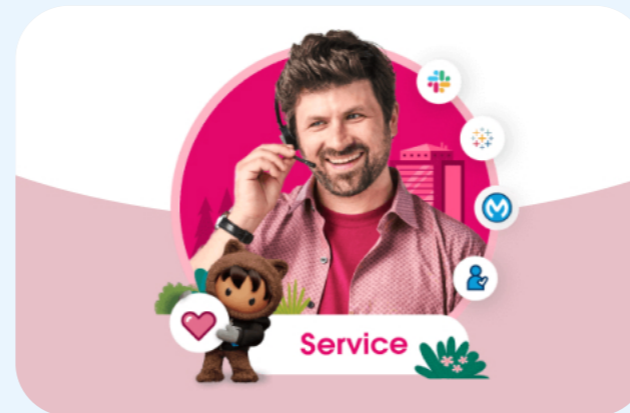
With the right tools, you can transform into the customer company your customers need.

To get started with AI and automation in your service department right now, check out these resources.



Calculate your cost savings from implementing Service Cloud

[ACCESS THE CALCULATOR >](#)



See how Service Cloud delivers efficiency, productivity, and a unified view of your customer

[LEARN MORE >](#)



Learn how customer service teams are shifting higher-touch interactions to low- and no-touch channels to scale customer service

[LEARN MORE >](#)



# How to Level Up Your Use of Automation and AI

The journey to becoming a customer company starts with AI and automation. Though some may be further along, it's never too late to invest in your customer.

Here are some questions to help you determine where you can implement automation and AI in your service tech stack to boost efficiency and promote personalization across the entire service experience.

## Customer-focused automation and AI:

- ✓ Do your customers have ways they can answer questions or troubleshoot issues without contacting an agent?
- ✓ If you have chatbots, how do they interact with customers? How often are cases escalated to agents? How often are customers reporting that their issues were solved by the chatbot?

## Service team-focused automation and AI:

- ✓ Do your agents handle repetitive, routine cases, or are there repetitive tasks involved in opening or closing cases?
- ✓ Do agents have the information they need to provide personalized customer service?
- ✓ What is your agents' average case handling time? What tasks take up the most time?
- ✓ Are your agents able to see timely and relevant offers and recommendations that they can share with your customers in real time?
- ✓ Are your agents spending time on administrative activities that don't generate value?

## Process-focused automation and AI:

- ✓ How are customer service cases currently routed to live agents?
- ✓ If you're currently implementing automation or artificial intelligence, how well are those tools performing?
- ✓ Do you have integrations that help process customer data across different systems?







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