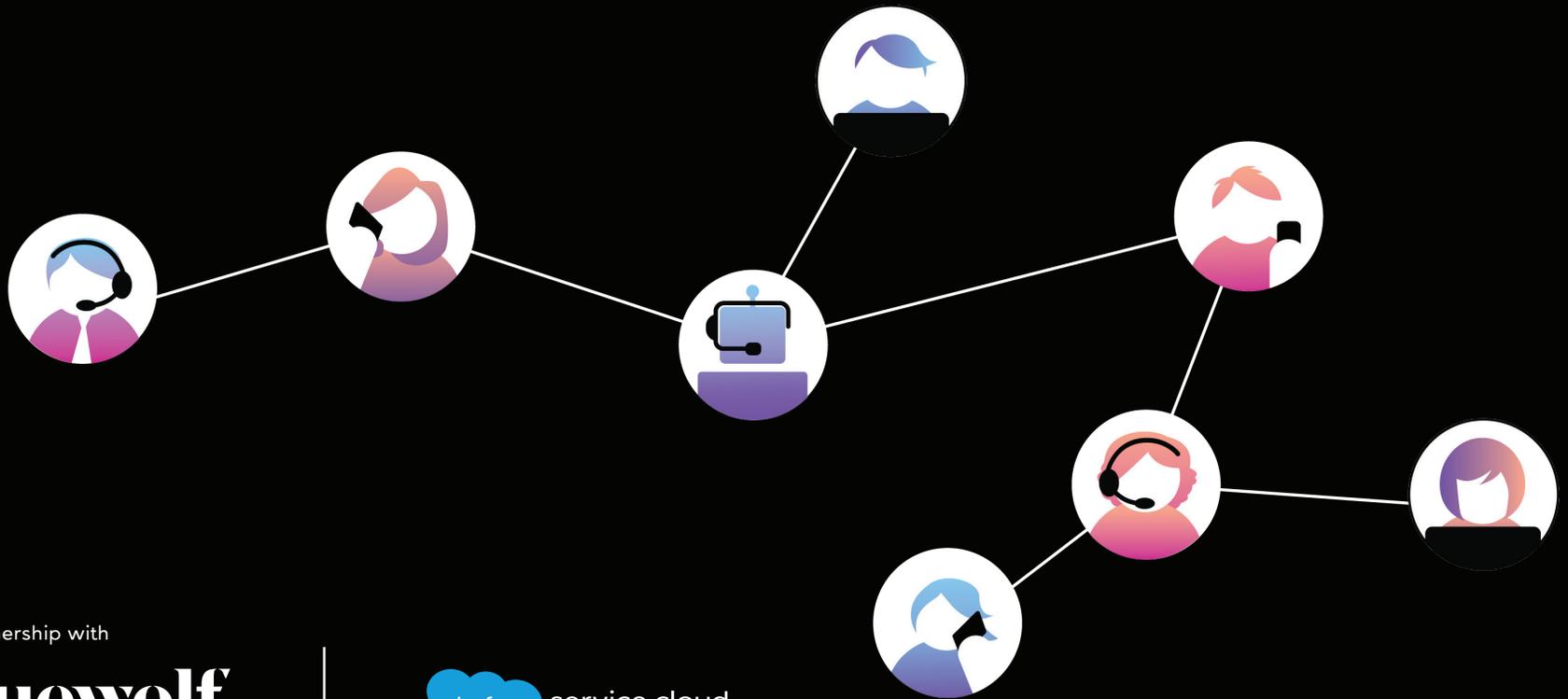




2019 Edition

# The Age of Experience



In partnership with

**bluewolf**  
an IBM Company



# Three guiding trends for CX in the contact center

Forrester, in their **CX Index analysis**, identified that customer experience (CX) is a function of the customer achieving their goal, expending minimal effort to get there, and then most importantly, how they feel about the exchange, or their emotions.

**Gartner** has stated that by 2020, 81% of companies expect to be competing mostly or completely on the basis of CX.

However, delivering exceptional CX has become more complex in recent years with customers expecting to interact with organizations through the proliferation of new communication channels available such as email, SMS, social media, mobile, and more.

As a result, the contact center is playing an ever-increasing role in CX, particularly for high touch complex situations or for resolving digital failures.

Deploying a contact center solution designed to work in tandem with Salesforce is foundational to a seamless, memorable CX that fosters brand loyalty. In this guide, we walk through three trends to guide a successful CX strategy.

**1** An integrated and omnichannel communications experience

**2** Agent roles are becoming more strategic

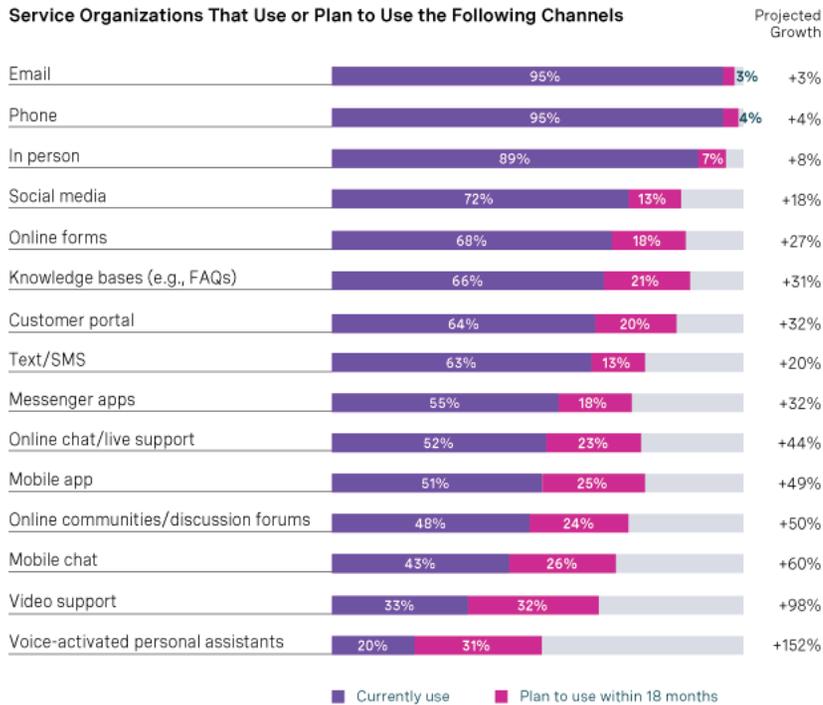
**3** AI investment trends continue to expand

# An integrated and omnichannel communications experience

The growth of self-service channels like chatbots and communities continues to add to the omnichannel experience. Service Executives 2019 priorities for the contact center are:

- Diversify and advance digital channels to resolve more kinds of questions on each type of channel
- Make knowledge easily accessible to agents, digestible for AI to understand, and ensure it's accurate
- Use real-time, cross-channel engagement and insights for customer journey mapping/orchestration
- Coach agents on recognizing cross-sell and upsell opportunities, and appropriately responding to customers' complaints, concerns and questions
- Use AI to solve routine issues/questions to free up agents to handle more complex requests

The average customer now uses 10 different channels to communicate with companies.



## Best Practices:

- The customer experience can be significantly improved by carefully routing customers who are stuck in a chatbot conversation to the best available live agents using the same routing rules that govern the other channels.
- The chatbot conversation and chat detail records should be automatically logged in Salesforce for later Einstein AI or human analysis.

Your AI Readiness Guide for Contact Centers, Bluewolf

State of Service - Salesforce Research, 3rd edition

Among Service Cloud users, those with chatbots are **54%** more likely to say they provide a cohesive experience across Marketing, Sales, and Service. **26%** of Service Cloud users are using AI-powered chatbots. Another **12%** are planning investment within one year.

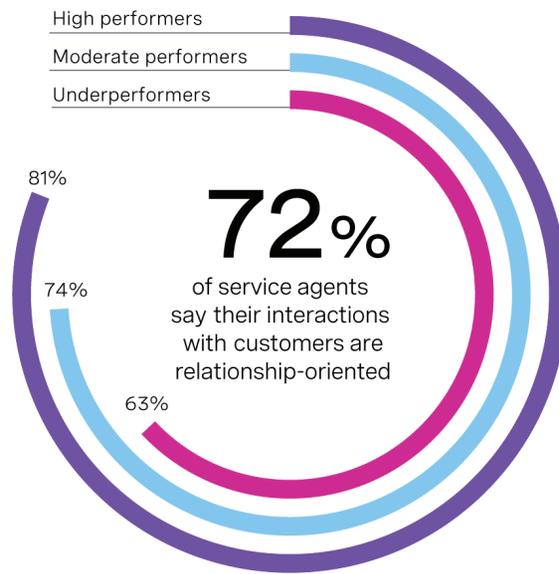
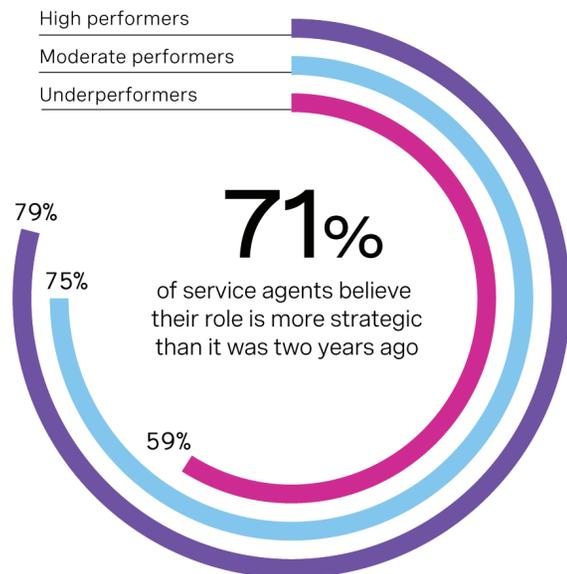
The State of Salesforce 2019 Report, Bluewolf

# Agent roles are becoming more strategic

As chatbots and AI are starting to offload routine issues and questions, service agents are having to address the more complex customer cases, not only within the contact center but also in the field.

Nearly two-thirds of service decision makers say improving their workforce skills is a high priority, and over three-quarters are making significant investments in agent training. These investments are key to agents taking on more challenging work.

While most agents say they're getting the training they need to do their jobs well, they won't be able to take on their elevated roles without the right resources. Over half of agents say they have to toggle between multiple screens to find all the information they need to do their job.



of service decision makers view investment in agents as a vital part of their service transformation



# AI investment trends continue to expand

AI investments are expected to continue climbing as more companies adopt AI into their customer journeys. AI will help scale support, deliver personalized service, and empower agents to do more.

AI-fueled engagement increases operational efficiencies, offloads repetitive tasks from customer service agent workloads and allows agents to focus on nurturing customer relationships.

AI use cases should be aligned to business outcomes, developing a customer-centric approach that focuses on how easy is it for customers to do business with the company on each channel:



## Acquisition

New customer acquisition



## Expansion

Incremental cross-sell, upsell, or organic growth



## Retention

Reduced churn for more profitable customers



## Cost Savings

Reducing the cost to acquire or service customers

## Top Use Cases for AI in the Contact Center:

- AI-powered chatbots handle simpler cases, freeing agents to deal with more complex cases
- Chatbots gather initial data from the customer before handing off to a "live" support agent
- AI routing of cases during busy traffic periods, matching cases with the best-suited agent
- AI uncovering patterns and issues where the multi-channel customer journey can be improved



of companies are investing in AI for service solutions like case routing and escalation.



of agents believe automating routine tasks would allow them to focus on higher value work.

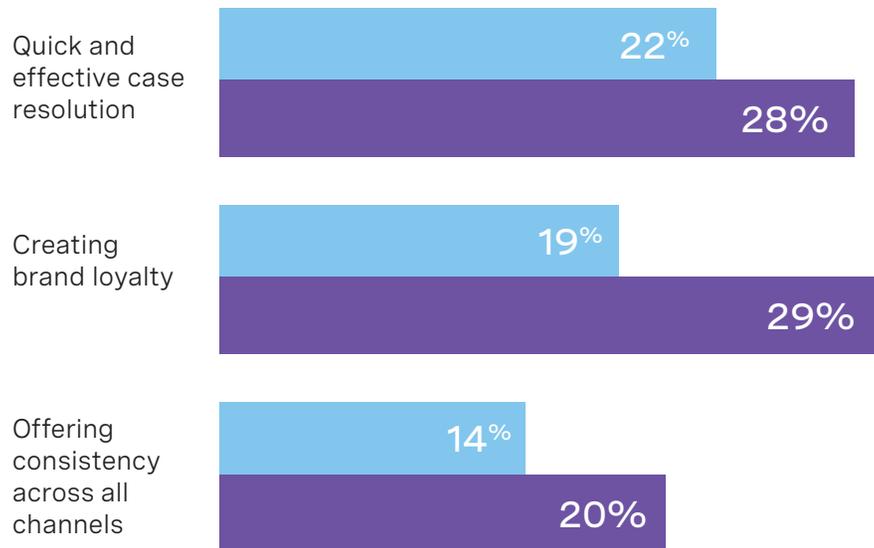


of organizations are actively looking to for ways to use AI

# Beyond cost reduction, customer service delivers value

The key to delivering a unified experience across all channels is to ensure that data from other departments is actionable by your service agents. When it's easy for Service to collaborate with Sales and Marketing directly in Salesforce, customers feel the difference.

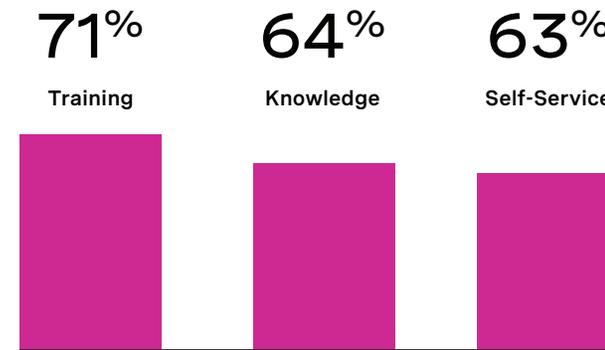
## Service agents excel at:



-  When it's easy to use data produced by other departments
-  When it's not easy to use data produced by other departments

As simple, routine requests are offloaded to self-service channels. Service organizations are investing in solutions that help contact center agents solve for the more complex cases that make it through to a live agent.

## Where service organizations are increasing investment



## Salesforce Customers Using or Investing in AI Chatbots

26% of Service Cloud users are using AI-powered chatbots



The State of Salesforce 2019 Report, Bluewolf

# What to do now...

1

Deploy omnichannel solutions that allow customers interact with the channels of their choice, while ensuring a unified, connected customer experience.

2

Ensure service agents are equipped with the skills and tools to address the more complex cases they will face on a daily basis.

3

Deploy AI and analytics to improve operational efficiencies and allow agents to focus their efforts on nurturing customer relationships.





Bluewolf, an IBM Company, is the global Salesforce consulting agency committed to creating customer and employee experiences that drive a return on innovation. We enable companies of any size and industry to deliver deeper, personalized customer moments with Augmented Intelligence (AI) as a competitive advantage—now.



Service Cloud, the world's #1 customer service platform, empowers every service employee from the contact center to the field with the innovative tools, unified data, and embedded training needed to deliver world-class customer service. Across every channel — whether it's messaging, communities, chat, phone, in-person, or IoT signals — Service Cloud is enabling Trailblazers to put the customer at the heart of every service moment and deliver personalized, consistent, transformative experiences.



Vonage Contact Center for Salesforce powers customer engagement that transforms businesses globally. The award-winning cloud customer contact platform revolutionizes the way organizations connect with their customers worldwide, enabling them to sell more, serve better and grow faster.

Learn more about how Bluewolf, an IBM Company, and Vonage help companies get the most out of Salesforce now at **bluewolf.com** and **vonage.com**