



# The Call Center Manager's Guide to Data-Driven Customer Service.

5 data management rules for superior customer support.

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## Introduction

# Keeping Customers Happy.

# Keeping Customers Happy.

Customer experience is a major differentiator for businesses today. Customers have higher expectations for the service they receive, regardless of whether they use the phone, social media, email, or other digital channels to get their issues resolved. Customers want a highly personalized experience, quick resolutions, and no hassles.

The call center plays a vital role in building and maintaining customer goodwill, and each customer interaction is a precious opportunity to delight the customer. With businesses amassing vast amounts of data about their customers every day, customer data—in particular real-time data—has become a key attribute in providing superior customer service.

But business and IT leaders know transforming the business to be more customer-centric is a journey. Seventy-nine percent of companies face challenges when connecting disparate data to create a single customer view<sup>1</sup>.

## What's the cost of bad customer data?<sup>2</sup>

- Bad customer service costs companies \$338 billion annually around the world.
- 50% of customer service agents fail to answer customer questions.
- 61% of customers went to a competitor due to bad service.

# Keeping Customers Happier Using Real-Time Data.

Real-time customer data not only lets you know what customers are doing right now but also the historical context for what they're doing. And this isn't isolated to a single customer—you can use real-time data from groups of customers to understand trends, which would help call centers in numerous ways, such as helping managers to forecast busy times, and helping agents to predict outcomes, or to better recommend resolutions.

And real-time customer data has become important as companies use social media to provide customer service. According to a recent survey of consumers who used social channels for customer service, 42 percent of them expected the brand to respond within the hour<sup>3</sup>.

Many organizations turn to market-leading CRM solutions like Salesforce Service Cloud to improve the customer support process. However, they often overlook the quality of the underlying data. As a result, the improvements are marginal and there is still a lot of frustration for both agents and their

customers. Bad customer data means agents waste time checking names, addresses, email, and other details as they communicate with customers. And these issues can be magnified if they're using real-time customer data that is bad. The use of up-to-date data is only effective when that data is clean and connected.

**Agents aren't effective if they're dealing with bad data ...**

70% of brands have suboptimal or no ability to integrate customer data between online and offline sources

80% don't apply customer value scores

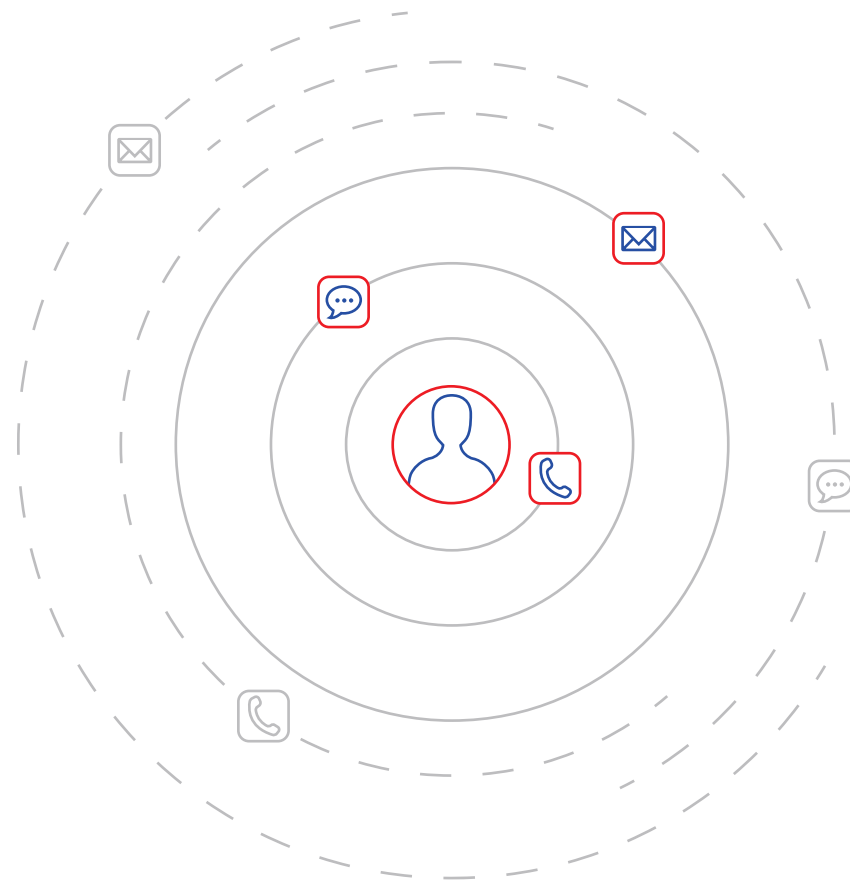
74% can't recognize customers in real time

# Great Data Improves the ROI of Your CRM.

Marketers recognize data's vital role in delivering a superior customer experience and they're taking action to improve data hygiene. In fact, marketers are 53 percent more likely to execute data hygiene techniques than they were the prior year<sup>4</sup>.

Putting accurate and current information at the fingertips of your customer service reps enables your agents to deliver higher levels of service and to be more productive. And the business will realize the full value of the investment in CRM.

In this eBook, we'll describe how real businesses are using data to improve customer service. We'll also detail the five rules to delivering actionable customer data in real time so that your service agents can exceed your customers' expectations, and you can drive business process efficiencies.



# How Carbonite Improved the Customer Experience.

## CARBONITE

Like most companies, Carbonite, a provider of cloud and hybrid data protection solutions for small and mid-sized businesses, wanted to deliver exceptional, responsive customer service.

But meeting that goal was getting harder. The amount of data in Salesforce had tripled, and its legacy cloud integration product couldn't keep pace. The customer service team was entering a lot of data manually, which increased errors and prevented agents from really listening to what the customer was saying.

Carbonite turned to data to drive its customer experience. It unified its cloud data with its other enterprise applications, and for the first time, its call center agents had access to relevant and trustworthy Salesforce information in real time. It also integrated data from its master subscription database into Salesforce Service Cloud, allowing customer service reps to resolve cases faster—and at the first time.

**“The savings in time, money and headcount is dramatic. We have also eliminated data quality errors, which used to occur during the copy/paste stage. Best of all, this Informatica solution has helped us invest in current employees/training resources rather than headcount to support manual processes.”**

**—Robert Frost,  
Vice President of Customer Support, Carbonite**

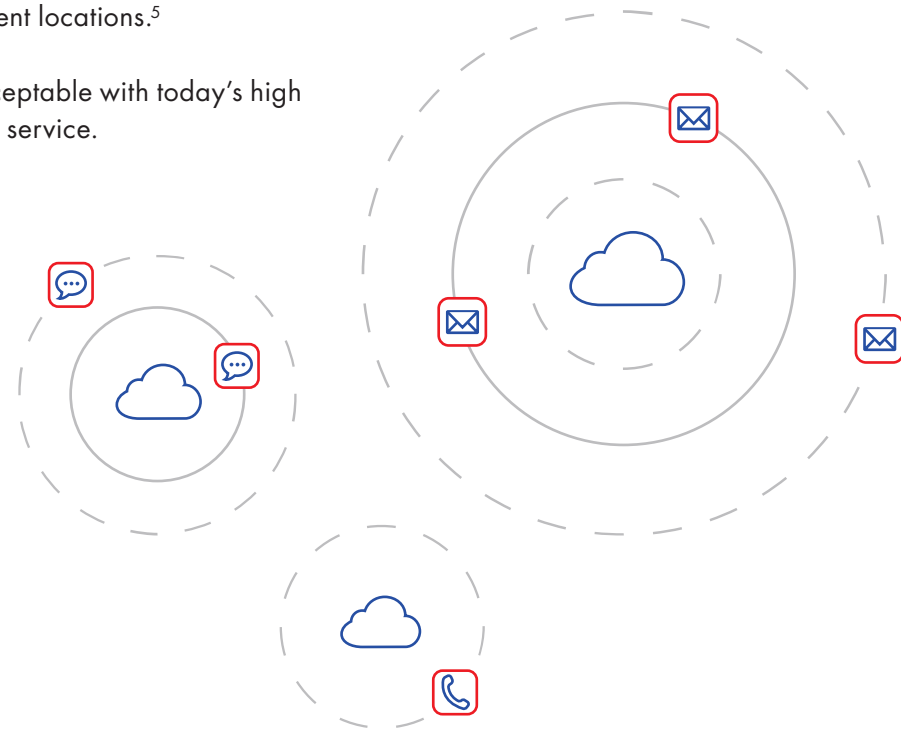
# Power Real-Time Customer Service with Application Integration.

Many call centers have embraced cloud-based customer service using Salesforce Service Cloud. Many were already users of Salesforce Cloud and liked the rapid deployment and the financial flexibility of an operational expenses cost model.

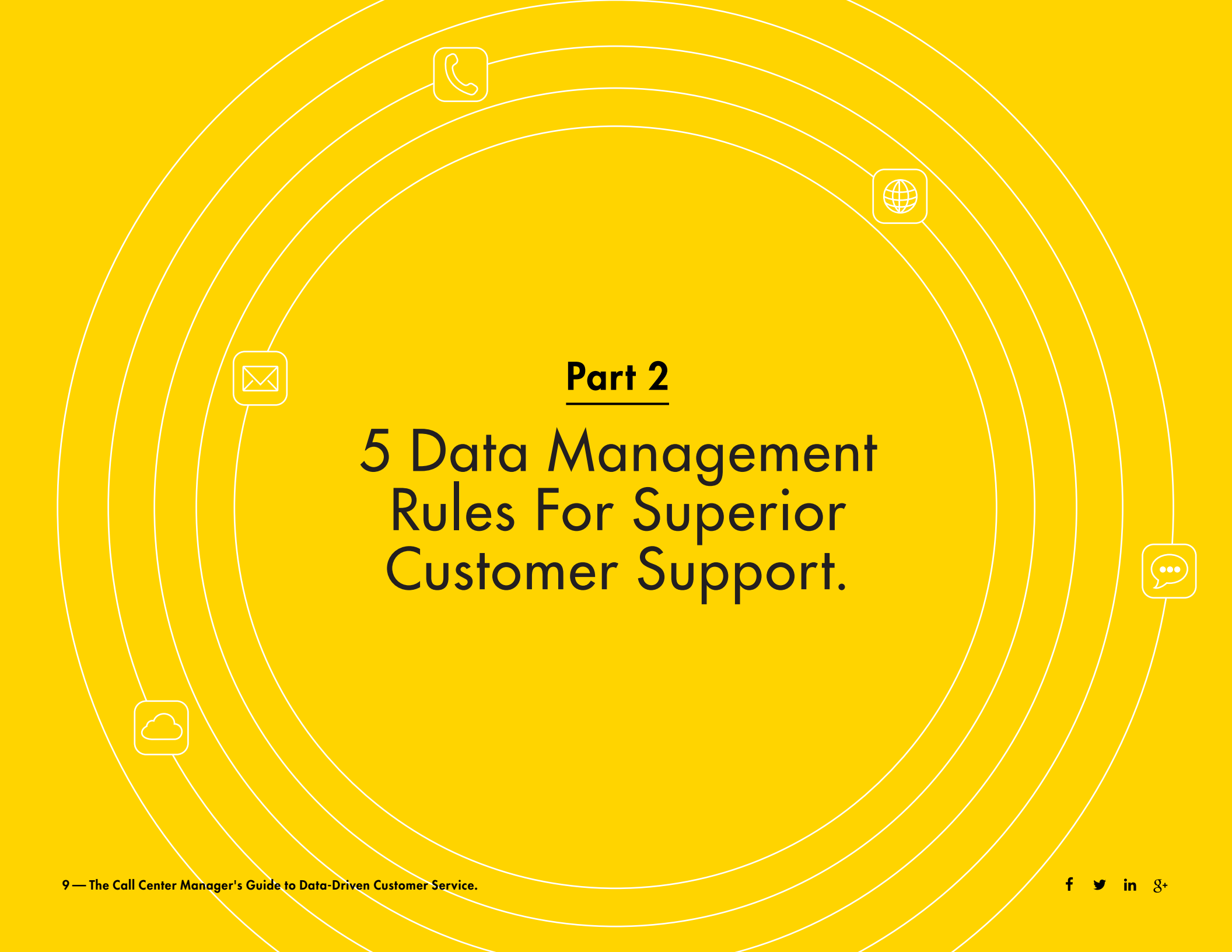
But while cloud-based customer service is easy to adopt, many customer experience leaders have found that it can be difficult to realize the maximum business value. That's because each cloud application is its own island, disconnected from other core business, marketing, and sales applications, whether on-premise or in the cloud. With each application building its own silo of data, there's just no clean way for customer service reps to get the answers they need quickly.

In fact, 48 percent of companies that derive business value from Salesforce struggle with accessing different types of data or reconciling data from different locations.<sup>5</sup>

That's just unacceptable with today's high expectations for service.







**Part 2**  
**5 Data Management  
Rules For Superior  
Customer Support.**

Rule #1:

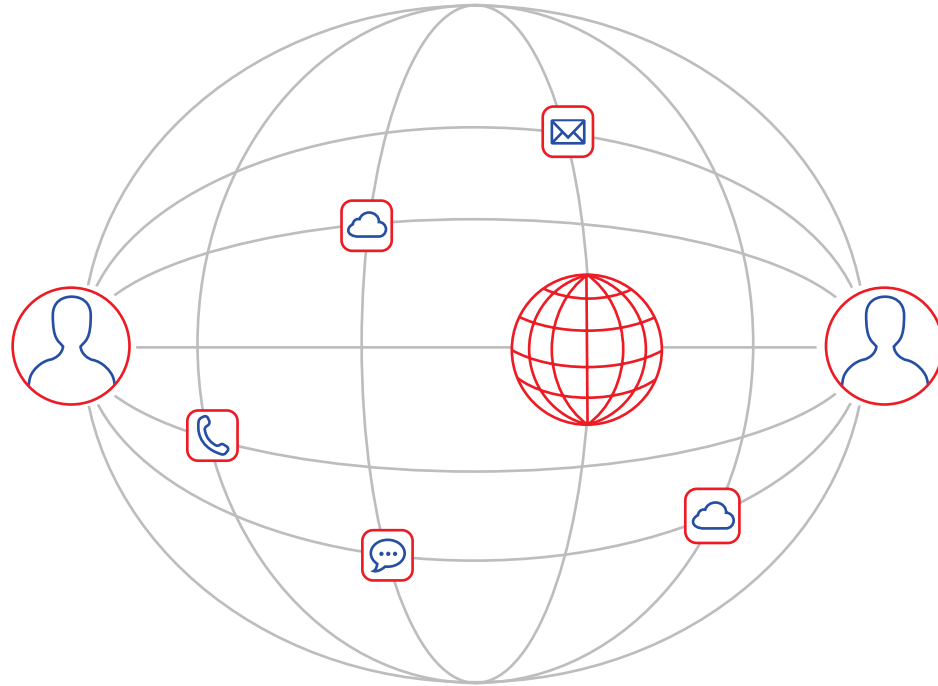
# Liberate Your Data.

## Rule #1: Liberate Your Data.

# Set your data free.

Our first rule is to liberate your data in real time. Be sure to free your customer service data with a solution that can bridge both cloud and on-premise worlds, and can deliver critical information to call center agents and customer service reps whenever and wherever they need it.

Whether you need to integrate purchase history from your cloud CRM, inventory information from a legacy ERP system, check account status in a finance application, or gain visibility into past marketing offers, building real-time integrations between Salesforce Service Cloud and other business applications will liberate customer data and unify applications so that customer service reps can reach across departmental boundaries to resolve the issue faster.





A photograph of a call center environment. In the foreground, a woman with long brown hair, wearing a headset and a white and blue striped sweater, is smiling and looking towards the right. Behind her, several other call center agents are seated at their desks, also wearing headsets and working on computers. The background is slightly blurred, showing office cubicles and computer monitors.

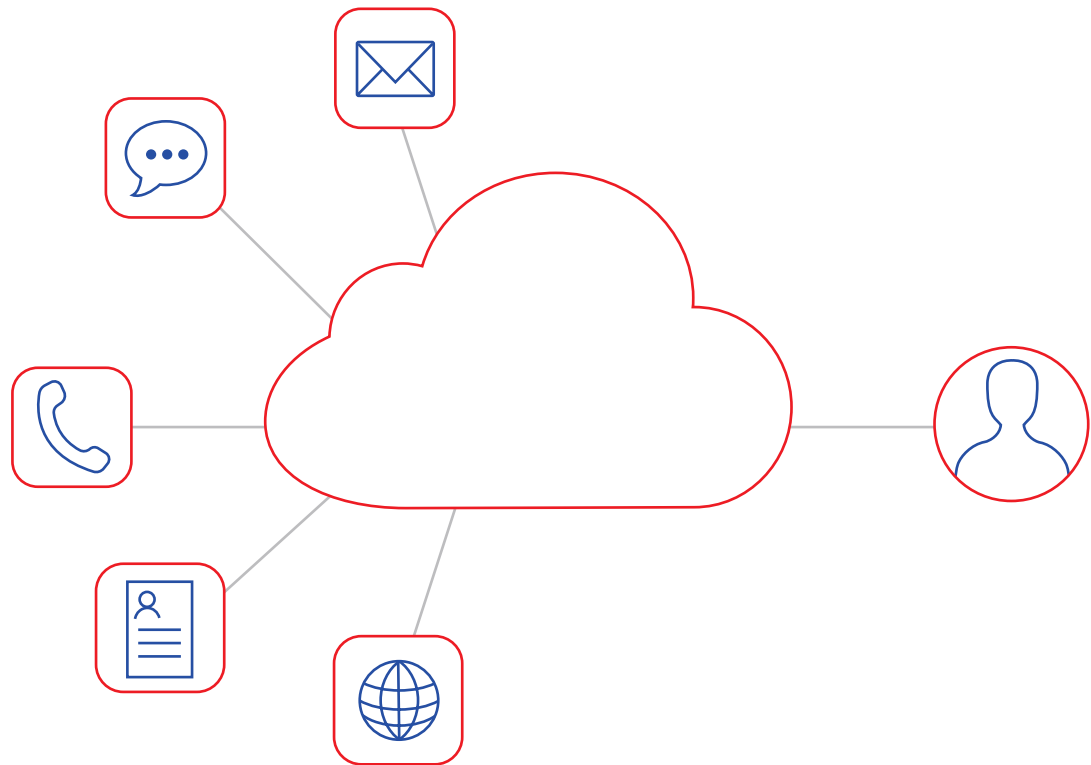
Rule #2:

# Empower Your People.

# Use automation to boost agent productivity.

Customer service tasks are often repetitive. Agents often copy and paste account information from one application to another and type in the same data over and over. It's a time-consuming process and it's easy to make an error.

To streamline workflow, routine tasks can be automated, such as automatically opening a service ticket when a customer calls, clicks on a "contact me" button on a web page, or complains about poor service on social media. Tasks such as follow-up emails with instructions or customer satisfaction surveys can be sent automatically as well.



# Let wizards lead the way.

Call center agents need the right information at their fingertips—and they need a way to reduce the effort needed to work with that information. Automation can help to eliminate repetitive work and enable agents to focus on the customer experience.

Informatica Cloud Application Integration uses wizards to automate tasks without the need to open multiple tabs or to cut and paste information from one application to another. By removing these manual steps, agents can resolve cases much faster and turn to helping the next customer sooner. Calls are shorter and more efficient. Agent utilization rates go up, and maximum caller wait time goes down.

For example, Carbonite successfully cut the time to create individual support cases by 20 seconds after it integrated data from its master subscription database into Salesforce Service Cloud.

Let's do the math to understand the net result of this ...

## How Carbonite helps 1,760 more people a day.

**Before**

$$5 \text{ minutes} = 12 \text{ cases per hour} \times 8 \text{ hours} = 96 \text{ cases per agent per day} \times 220 \text{ agents} \text{ Total: } 21,120 \text{ cases per day}$$

**After**

$$4.6 \text{ minutes} = 13 \text{ cases per hour} \times 8 \text{ hours} = 104 \text{ cases per agent per day} \times 220 \text{ agents} \text{ Total: } 22,880 \text{ cases per day}$$

+1,760 more cases per day

Not only does the customer spend less time on the phone, but the company can also help 1,760 more people without hiring additional customer service reps.



Rule #3:

# Give Your People Great Data.

# Great customer service is built on great customer data.

Little things make a big difference when the customer relationship is on the line. Agents must be confident that customer and company names are spelled correctly and are not duplications. If email addresses are mistyped, then all of the follow-up emails bounce. Physical addresses must be correct so replacement parts and technicians arrive at the right location. These small errors waste agents' time, cost the company money, and fail to deliver the personalized experience that customers expect.

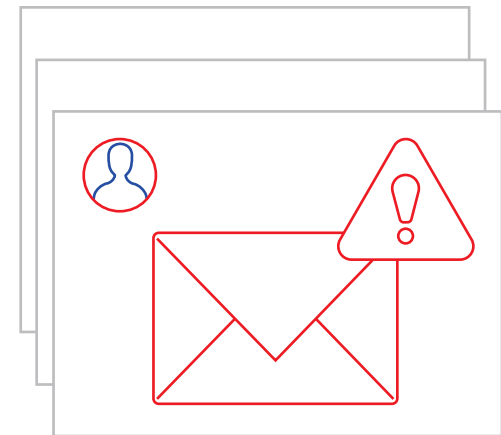
It's a common problem. In fact, 28 percent of companies name poor or inconsistent data quality as the biggest barrier to deriving business insights from Salesforce.<sup>6</sup>

## **Trusted data is at the heart of a total customer relationship.**

Having reliable data is important across the customer lifecycle, but it is particularly critical when speaking live with a customer.

Informatica's data management platform enables collaboration across your entire business—from sales to service. By using data quality methods, you can define your business rules once, and they will be applied consistently anywhere. And that will ensure that your agents can communicate with customers using accurate contact record verification.

Having a trusted customer profile is critical for customer service so the agent can see the total customer relationship, including the products the customer uses, the employees or partners they work with, and the customer's locations, assets, and preferences.





Rule #4:

# Embrace Mobility.

## Rule #4: Embrace Mobility.

# Take great customer service to the field.

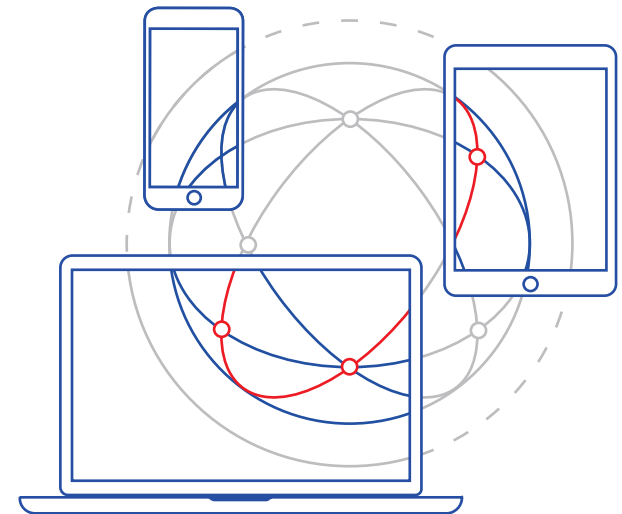
You need to be able to deliver great customer service from the call center to field service. Embrace mobility, and you can keep customers apprised of the technician's arrival time. Equip customer service agents with mobile devices, and they can enroll new customers in insurance plans, configure service plans, or handle merchandise returns—wherever their customers are.

Your customers have their phones in their hands, too, and they want to be able to schedule appointments, resolve issues, and complete satisfaction surveys via their mobile devices.

### **Agents can get their work done from any device.**

Customer service reps are no exception to the mobile trend. Whether your business has service reps in the field or a virtual call center strategy that lets agents work from anywhere, it's critical to give agents the ability to get the right data to the right person and in the right context—wherever and whenever they need it.

That agility is at the heart of real-time cloud integration. Whether your agents are focused on onboarding new customers, inspecting inventory, or another key task, they have easy access to process workflows from any device. There's nothing to install and agents are always working with the latest and most accurate data.





Rule #5:

# Integrate Applications. +



## Rule #5: Integrate Applications.

# Consume and collaborate using application services.

Customer service doesn't happen in a vacuum, and to deliver exceptional service, it's critical to integrate customer service workflows and applications with other cloud or legacy applications that hold customer data. Application integration enables your customer support team to foster deeper collaboration across departments and business units.

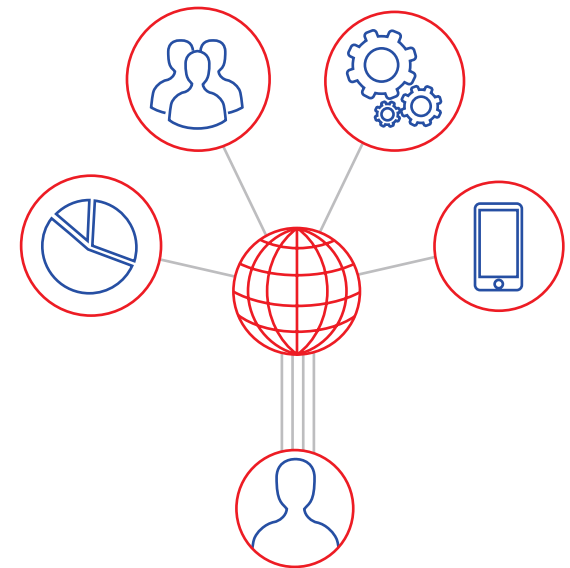
Increasingly, customer service isn't just about dealing with unhappy customers. Be proactive by leveraging data from social media, machine sensors, systems logs, or other sources. With data analytics, you can uncover customer preferences or make predictions about a customer's maintenance needs.

Applications talk to each other through application programming interfaces, also called APIs, which enable them to advertise and consume services. This is a great way to open up customer data and other functionality within your organization—or to business partners.

### **Seamlessly integrate with a connected world.**

Whether you're connecting to cloud applications, legacy databases, or connected devices, it's essential to have an open, standards-based way to exchange information. That gives you the flexibility to adopt new applications—whatever they may be—and integrate them effortlessly into your call center workflow and ensure that your agents are working with great data.

You can get data into your applications faster, and that frees your developers and business users to focus on creating higher value functionality that will drive the customer experience.



## Conclusion

# How the 5 Rules Enabled Citizens Disability to Help Its Customers Faster.



Citizens Disability helps people who are unable to work because of a chronic illness or disability through the often-bewildering process of getting Social Security Disability Insurance or Supplemental Security Income benefits.

The company followed the five rules. It began by liberating data from silos and ensuring data quality. It integrated multiple applications so that everything from collecting the initial information from the claimant, storing it in Salesforce, scheduling doctor's appointments on third-party scheduling systems, and booking court and administrative hearing, is a fluid process. Agents are empowered, as a process that once took days can be performed in minutes.

Citizens Disability embraced mobility too. The Affordable Care Act was an opportunity to expand its business. Citizens Disability agents took to shopping malls to sign up people for

health coverage. Agents had tablets to help people select the right plan and automatically email the plan details.

By embracing the five data management rules for superior customer support, Citizens Disability is able to help claimants successfully to quickly complete a disability claim.

### Citizens Disability followed the rules

1. Liberated its data from silos
2. Empowered its agents with automation
3. Gave its agents trustworthy data
4. Embraced mobility for customer service
5. Integrated on-premise and cloud applications

# Next Steps.

In this eBook, we've described how your call center can deliver a superior customer experience when it has actionable customer data in real time. We invite you to test drive Informatica Cloud to see how you can bring new levels of agility and efficiency to your call center.

Try out Informatica  
Cloud for 30 days.



## Sources

1. "State of Cross-Channel Marketing," Experian, December 2014
2. Desk.com (Salesforce), "The True Cost of Bad Customer Service"
3. **Convince & Convert**, "42 percent of consumers complaining in social media expect 60 minute response time."
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5. **Bluewolf**, "The State of Salesforce Report, 2015-2016"
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