

Build connected customer service experiences

Gain the information advantage with a 360-degree view of customer information

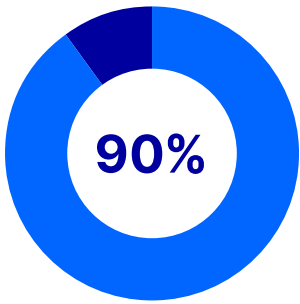


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Did you know?

A repeat customer has a 60% to 70% probability of buying again and again, but the average conversion rate for a new customer is only between 1% and 3%.¹



By 2025, customer service organizations that use AI-enabled knowledge automation will achieve 90% first contact resolution, up from 50% in 2021.²

Ready for the future of customer service?

Service excellence relies on access to customer information—from contracts and account status to customer purchase history and product technical specifications. With information silos and disconnected systems preventing clear lines of sight, customer support and service management teams can struggle to resolve issues and fail to provide superior customer experiences.

For these teams, the goal is not to attract customers but to keep them. It is far less costly to retain customers than acquire new ones. Loyal customers also tend to refer other buyers, make repeat purchases and expand spending across additional products and services.

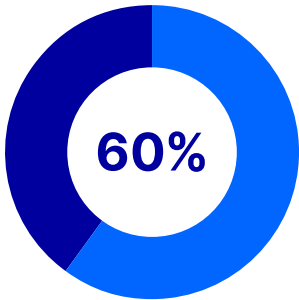
Building connected customer experiences is essential for memorable engagements and sustainable lifelong customer relationships.

A consolidated and complete view of the customer across the enterprise builds better service processes and drives deeper insights that help solve problems efficiently, producing experiences to delight customers, generate greater loyalty and build better relationships.

The onus is on organizations to provide a modern integrated approach that drives productivity from issue to resolution. To achieve operational excellence, organizations must better connect people, content and systems for a complete 360-degree view of customer information. At the same time, automation and customer self-service options can help organizations capture, manage and deliver relevant information when and where it is needed.

This guide outlines four steps to take to achieve operational excellence within customer support and service management functions while driving memorable customer service experiences.





Did you know?

60% of customers say it generally feels like they are communicating with separate departments, not one company.³

1 Solve customer issues faster

The reality is that customer service professionals, such as customer service representatives and case workers, are only as good as the information they can access. Content critical to the customer experience is often scattered across business applications, file shares and systems. These can include enterprise resource planning (ERP), customer relationship management (CRM) and enterprise content management (ECM) systems. Further hindered by employees working remotely, customer service professionals spend time navigating manual and fragmented processes to serve customers as quickly and efficiently as possible.

These inefficiencies typically result in valuable information being lost, forgotten or hidden in unsearchable locations. This leads to outdated, inconsistent or conflicting customer information, introducing risks for customer support and service management teams including:

- Fragmented customer interactions.
- Inconsistent customer experiences across departments.
- Legal, compliance, security or privacy issues.
- Extended customer wait times and additional escalations.

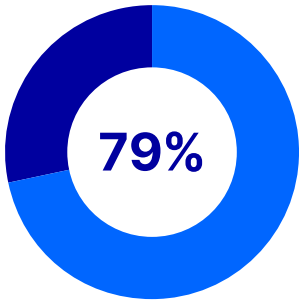
Unless relevant content is automatically shared or synched across the various applications used daily, teams may be trying to address customer inquiries without a solid history or understanding of the customer’s needs and wants. To solve complex customer issues, service representatives must have access to all types of aggregated customer information.

The diverse range of customer service touchpoints has resulted in disconnected customer experiences and increased costs.⁴

When an organization has a customer’s attention or is trying to capture it, every second counts. How quickly a customer service agent accesses a current transaction history, a sales rep locates a pending purchase order or case workers switch between open cases and tasks to effectively route a call, can mean the difference between customer satisfaction and frustration.

Enabling fast, easy access to structured and unstructured customer information, regardless of where it is stored, helps organizations:

- Improve productivity.
- Reduce delays and customer wait times.
- Solve customer issues faster.
- Create positive customer experiences.



Did you know?

79% of consumers say they'd more likely trust a company with their information if its use were clearly explained.⁵

Safeguard customer information

Responding quickly and consistently to customer needs without compromising security, compliance and privacy risks can be a daunting task. It gets even harder when enabling field, remote or hybrid workers and managing unstructured information. While enhancing customer information management to boost productivity and service excellence is critical for providing superior customer experiences, organizations must ensure that the tools and technology implemented can mitigate legal and regulatory risks.

Risk mitigation capabilities include:



Data integrity



Auditability



Defensible recordkeeping



User-level access control

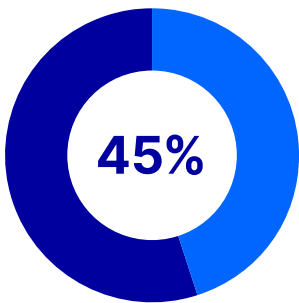
[Learn more about preparing for data privacy laws](#)





Did you know?

73% of customers expect companies to understand their unique needs and expectations. 62% expect companies to anticipate them.⁶



By 2027, 45% of agent-assisted interactions will use realtime analytics to improve business and customer outcomes.⁸

2 Build smarter customer profiles

Enabling productivity across the issue-to-resolution process, including case management, requires two key things: content and context. Delivering a consistent customer experience and building customer loyalty requires organizations to better understand, anticipate and learn from customer behavior. Knowing who the customer is and how to make it easier and more enjoyable for them to do business can turn an occasional buyer into a long-term loyalist.

Understanding customers' needs and wants is a critical first step toward improving the customer experience. But any possible holistic and accurate understanding of customers is often thwarted by fragmentation of customer information.⁷

Without access to complete and accurate customer profiles, the opportunity for meaningful engagement is often lost. Customer interactions plagued with incorrect product recommendations, slow problem resolution or extended delivery times can destroy customer trust. Equipping staff with up-to-date transactional, behavioral and demographic data and insight, allows them to provide the personalized and consistent experiences that customers deserve and have come to expect.

By breaking down information silos, organizations can extract meaning, nuance and context from vast amounts of unstructured content. With a more complete customer view, teams make better decisions and no longer waste valuable time hunting across systems for the right version of a document. This information advantage can empower them to:

- Proactively cross-sell and upsell.
- Implement self-service options, such as chatbots.
- Increase customer demand by creating relevant buyer experiences.

3 insights needed for better customer profiles:



1. Interaction context

Customers engage with organizational contacts across multiple channels such as social media, live chat, email and phone. This opens the door to strengthen customer trust with personal and relevant experiences through their preferred channels.



2. Interaction history

A complete picture of a customer's interaction history, including interactions on indirect channels such as social media, equips staff to better navigate the latest customer engagement.



3. Transaction history

With a transaction history of a customer, agents better understand the value customers are seeking, as well as their buying habits.



“Most CRM programs generate benefits to their organizations but neglect the customer experience. Application leaders should work with CRM program managers to ensure the CRM program is embedded within the broader design and delivery of superior customer experiences.”

- Gartner⁹

3 Adopt an automation strategy

Workforce disruptions, such as the increase in remote work, demand connected responsive systems that can scale to support customer growth and are independent of physical locations and people. Organizations need to continue to transform customer support and service management operations. A key step is enhancing staff’s ability to capture, manage and deliver transparent and connected information through automation strategies that accelerate customer service processes across multiple channels.

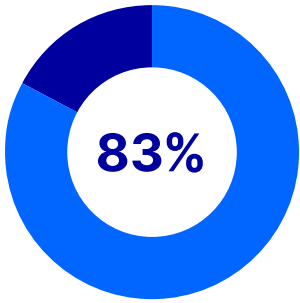
Organizations should automate repetitive tasks so agents can prioritize urgent, value-add tasks that enhance customer experience and retention. Automation processes can also automatically capture, classify and manage customer information throughout its lifecycle, populating relevant information within all connected systems to deliver a single source of truth across departments and teams.

When combined with smarter customer profiles and a complete 360-degree view of the customer, automation strategies can help organizations delight customers with proactive issue resolution and communications. For example, proactive customer communications about upcoming contract renewals or a new product launch based on previous purchase history.

Enable more intuitive customer self-service

Customers expect reliable self-service options in a digital-first world. For example, the ability to access and manage their own account information. Companies that cannot provide the expected level of self-service may lose customers to a competitor that can. Introducing these options also helps organizations scale their service offerings, providing all customers with access to the information and support they need.





Did you know?

83% of customers say they are more loyal to companies that provide consistency across departments.¹⁰

How automation impacts both sides of customer interactions

Benefits for customer service teams

- Reduced manual, repetitive tasks
- More efficient customer tracking and routing
- Elimination of unnecessary contact points
- Ability to address customer requests faster
- Consistency in available customer information
- Simplified information classification and management
- A reliable single source of truth across departments and teams

Benefits for customers

- Flexible self-service options
- Ability to easily access and manage accounts and service inquiries
- Reduced reliance on customer service hours
- Access to a variety of support channels to meet current needs
- Transparent view of case progression
- Confidence in issue-to-resolution processes
- Faster issue resolution
- Consistent interactions even when dealing with different departments



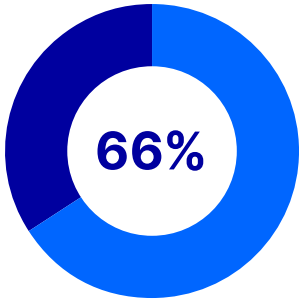
QUICK TIP

Automate incoming communications using information capture and extraction technology to deliver efficient customer tracking and routing, ensuring customer wishes get actioned quickly and consistently.

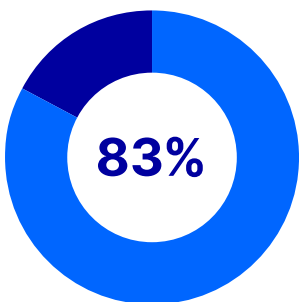




Did you know?



66% of customers say they often must repeat or re-explain information to different representatives.¹²



83% of customers expect to solve complex problems by speaking to only one person.¹³

4 Provide 360-degree customer views

“The service organization of the future will likely undergo numerous operational changes as it attempts to assert greater control over customer relationships.”

- Gartner¹¹

A true 360-degree customer view must include not just realtime data from a CRM, but also related, connected documents to drive better staff decisions.

Making this information accessible across the enterprise builds better service processes and drives deeper insights to:

- Solve problems faster.
- Work smarter.
- Deliver experiences to delight customers.
- Generate greater customer loyalty.
- Build better customer relationships.

By integrating advanced content management solutions with existing CRM, staff have the information they need, in a centralized view, to rapidly respond to customer inquiries with more insights—personalized and relevant to the customer.

The benefits of connecting all customer touchpoints through a complete 360-degree customer view, surfaced within the CRM, include:

- **Instant access to the right information when** it is needed for customer call inquiries, whether troubleshooting on the phone or virtually.
 - **Timely and well-informed answers to questions,** reducing further delays and additional service tickets.
 - **Reduced time and effort spent searching** for the correct documentation, customer history, product info and other information needed to resolve case issues.
 - **A better understanding of customer needs** to delight them and create loyalty.
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Additional resources

➔ [Solution: Content Management for Customer Support and Service Management »](#)

➔ [Solution: Customer and Account Information Management »](#)

➔ [Blog: What is a customer information management system? »](#)

➔ [Infographic: A day in the life of customer service and call center agents »](#)

➔ [Product: OpenText™ Core for Salesforce® »](#)

Achieve operational excellence through better content management

Fuel productivity and collaboration, gain critical insights and deliver exceptional customer experiences by integrating advanced content management solutions, including automation, with existing CRM systems. Connect all customer touchpoints and deliver a complete 360-degree view of customer accounts.

With this information advantage, organizations can drive customer loyalty and revenue through:

- Improved collaboration across sales and customer service for more consistent customer interactions across departments.
- Access to reliable customer profiles to better understand unique customer needs.
- Dynamic, realtime content to tailor more personalized customer engagements.
- Connected customer experiences available through multiple channels, including self-service options.

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1 AIIM, A Day In the Life of Customer Service and Call Center Agents. (2022)

2 J Davies, D Norrie, P Rathnayake, S Blood, Predicts 2022: Customer Service and Support – Paving the Way for Greater Ambition and Responsibility for the Customer Experience. Gartner®. (2021). GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

3 Salesforce, State of the Connected Customer, 5th Edition. (2022)

4 Blood, Steve, Equip Your Customer Service Reps to Support Seamless Customer Journeys. Gartner®. (2022).

5 Salesforce, State of Service, 5th Edition. (2022)

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13 Ibid.