

CUSTOMER SERVICE ANALYTICS IN CRM: The Foundation For Exceptional Customer Service

Are you facing challenges understanding and responding to the varying needs and demands of your customers? Read on to see how you can devise customer-centric strategies and deliver value-based customer service using CRM's customer service analytics.



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Executive Summary

Organizations around the world face performance challenges, from growth and profitability to understanding and responding to varying customer needs. Over the years, consumers have become more diverse and demanding; their expectations have risen exponentially, compelling businesses to elevate their customer service efforts. Price and availability of goods and services are no longer differentiating factors for customers – what they now seek is exceptional customer service and support.

Since different customers have different expectations, you may need to devise strategies that are customer-centric and cater to these expectations throughout the customer lifecycle. Delivering value-based customer service experiences result in predictable customer behavior, eventually leading to higher customer loyalty.



In order to achieve consistent success, your organization can retain customers by tracking customer trends with the help of sophisticated analytic tools. Proactive customer service, predictive exploration, and real-time analysis help maximize results and puts the goal of a competitive edge over others in the market within reach. **Customer service analytics are a sustained differentiator for every industry; they make use of modern technology and convert customer data into actionable insights, ultimately empowering effective decision making.**



Effective analysis helps improve the experiences customers have with your business. **This e-book gives an in-depth look at the customer service analytics space and how it can help you meet precise customer needs. You will also understand the long-term benefits attributed to the use of customer service analytics.**

Introduction

One of the keys to delivering sustainable improvements to customer service experiences lies in analytics. Simply resolving queries does not lead to business excellence. Did you know an estimated [\\$41 billion](#) is lost by U.S. companies alone each year, due to poor customer service? In order to enhance the overall customer experience, help desks and account managers need to have predictive capabilities that provide time-tested and proven solutions. As a result, customer engagement and service teams today are built with analytic capabilities that have the ability to capture qualitative, customer-centric data that helps in measuring and improving ROI.

Analytics can transform the

customer service experience and enhance repeatability, probability, and the relevancy of customer experiences by reducing inefficiencies and improving overall profitability. Analytics, when applied to CRM processes, can have a major impact on customer loyalty and total lifetime value. [62% of global consumers](#) have stopped doing business with a brand or organization due to a poor service experience. This indicates that help desks are a major component for customer service analytics, supporting the need to improve efficiency of operations and quality of the customer experience. For this reason alone, help desks need to be very efficient; response and resolution turnaround times need to be as low as possible.

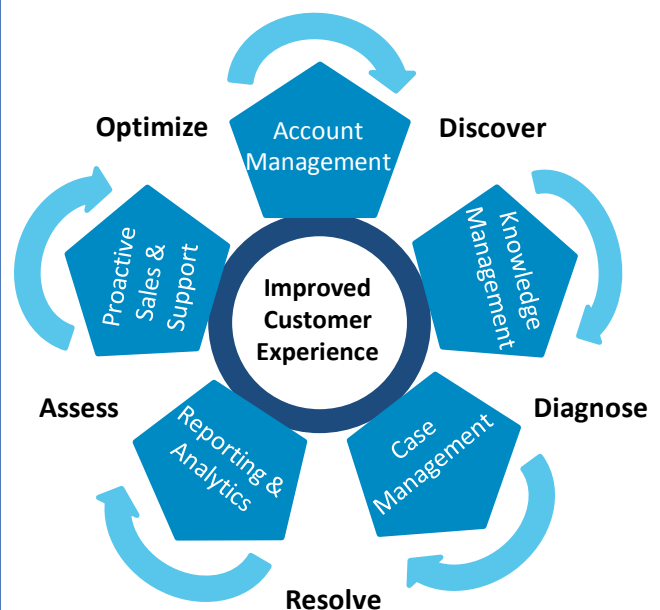


CRM for Customer Service Analytics

Delivering exceptional customer service is usually a top priority of every business. But this has not been easy to accomplish. Exceptional customer service requires holistic and profound understanding of the customer, and coordination of customer engagement across every touch point. So how do you achieve this? One way is to implement a CRM solution that offers precise customer insights that help enhance overall customer experience. Modern CRM solutions, are capable of recognizing and scrutinizing customer analytics; not only do they help you understand customers' psyche, but a CRM also provides the capabilities to execute and automate fruitful engagements based on those insights.

CRM offers a complete customer service solution that is familiar to users, customizable to your business processes, and scalable to meet enterprise demands. It encompasses a plethora of analytical features that help you to **1) understand the sales funnel and conversion metrics,**

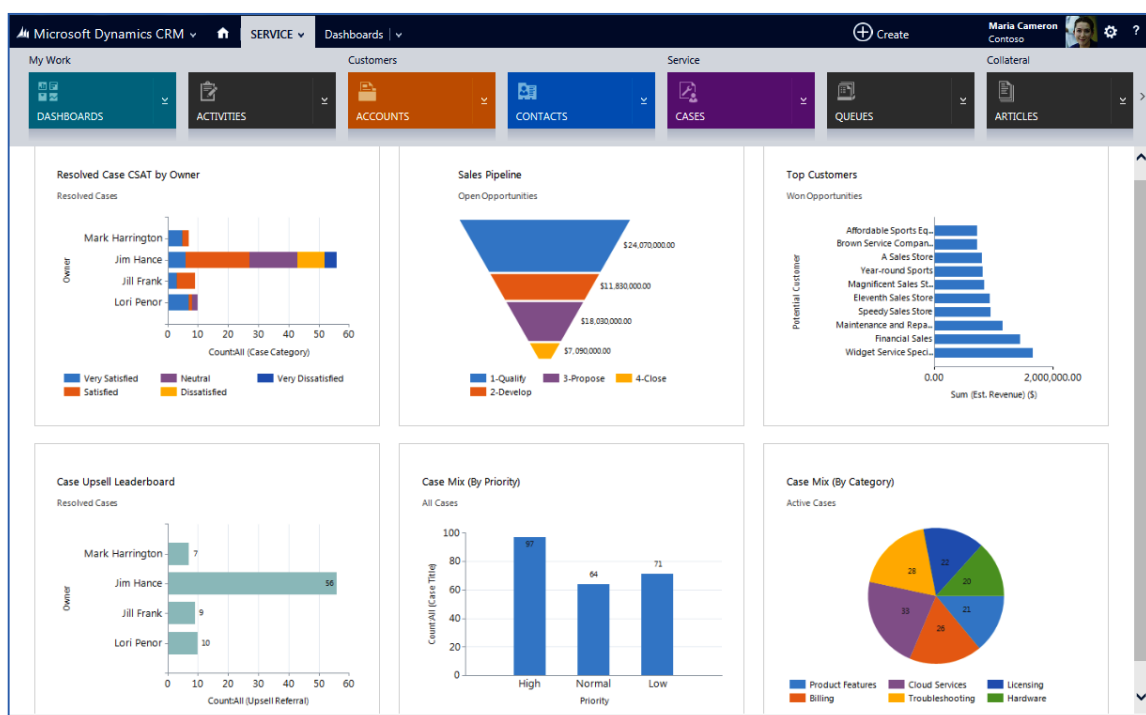
2) get insight into customer attributes, characteristics, and demographics, 3) recognize customer sentiments, voice, and feedback, and 4) plan how to reduce churn and improve the lifetime value of each customer. By utilizing multiple interaction channels such as phone calls, email messages, self-service websites, and in-person communications, you can quickly create, manage, and resolve customer service issues. By streamlining access to customer history, service level agreements, and a robust knowledge base, you can support customers more effectively and productively.



Through CRM's predictive analytics feature, you can perform advanced analytics with statistical analysis, predictive modeling, data mining, text and entity analytics, optimization, real-time scoring and machine learning and:

- Dramatically increase the response rates of offers, mails, and promotions through customer-specific messaging.
- Recognize the triggers and drivers that maximize customer satisfaction and make the most of unrealized value.
- Acquire and retain the most profitable customers, and strengthen customer loyalty.
- Optimize product features and pricing, customer service, and touch-point processes.

CRM presents professionals with real-time, actionable insights to client data. Through analytics, you can gain easy access to data from your CRM and make well-informed decisions by consolidating appropriate customer and operational information. Analytics enable decision making, such as how to improve a product so you can improve customer loyalty, set you apart from competition, and keep current and prospective customers happy. For instance, the Microsoft Dynamics CRM dashboard on the following page shows a quick snapshot of customer satisfaction cases and the opportunities that you can use to improve with easy data access.





The above screenshot spells out customer satisfaction results on open/closed cases and by other categories.

Do you want to measure which product line is getting the most complaints? Or if one customer service agent has more satisfied clients than another? This is your opportunity to make the most of your metrics and deliver that via your customized dashboard. In the dashboard above, the bar graph indicates customer satisfaction on closed cases over the last 90 days

so that the user is able to track if their performance training or improvements are impacting client satisfaction for the better.

Maybe you'd like to see the efficiency of how quickly your staff is resolving opened issues. If so, the opened/resolved cases line graph can give you that data – just select the timeframe, and viola – you have the data right in front of you. You can also load training documents for your team, or other important resources, right on the dashboard.

Service Customers With the CRM Customer Service Module

The customer service module within CRM is one of its most complex yet powerful modules. It accommodates different types of service organizations while at the same time retaining a high degree of simplicity for efficient and widespread adoption.

- With the customer service module, manage and track all of your customer activity through incidents or cases. Track processes from the arrival of incidents, through remediation up to final resolution.
- Add cases, assign them to different CRM teams, view their status, re-open them, and track them until closure.
- Automatically create cases based on pre-defined business rules.
- Add or modify case details such as

basic information, assignment, contract, and product information.

- Don't know where to look for answers? Teams can access the knowledge base and get necessary assistance for answering customer queries and solving incidents.
- Track time taken for resolution of incidents through Service Level Agreements and craft Key Performance Indicators to track customer service performance.
- Create quotes, invoices, and orders from within CRM by referring to product catalogs that offer multiple customizable price and discount lists.
- Efficiently schedule people, resources, infrastructure, facilities, and equipment and offer great customer service using the service scheduling feature.

The screenshot displays the CRM Customer Service Module interface. The top navigation bar includes 'File', 'Case', 'Add', and 'Customize'. Below this is a ribbon with tabs: 'Save', 'Actions', 'Collaborate', 'Process', and 'Data'. The 'Save' tab contains icons for 'Save', 'Save & Close', and 'Delete'. The 'Actions' tab includes 'Resolve Case', 'Cancel Case', 'Bomgar Activity', 'Connect', 'Add to Queue', 'Queue Item Details', 'Assign', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Collaborate' tab has 'Sharing'. The 'Process' tab has 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Data' tab has 'Run Report'. The main content area is divided into 'Information' (General, Notes and Article) and 'Related' (Common, Processes). The 'Common' section lists 'Activities', 'Closed Activities', 'Connections', 'Audit History', 'Bomgar Sessions', and 'Bomgar Session Keys'. The 'Processes' section lists 'Workflows' and 'Dialog Sessions'. The 'Case' record is titled 'Bomgar Activity' and 'CAS'. The 'General' tab is selected, showing an 'Overview' section with fields for 'Title' (Average order shipment time (sample)), 'Customer' (Advanced Components (sample)), 'Subject' (Query), 'Case Origin' (Web), 'Case Type' (Question), 'Assignment Information' (Owner: First name Last name, Follow Up By), 'Status Reason' (In Progress), and 'Priority' (Normal). The 'Contract and Product Information' section is also visible.

The Power of Social CRM

Over the past decade, companies have realized how effective social media can be for sales and customer service. As customer data is captured through multiple touchpoints, including social media, it can be used as a powerful tool to understand customer views about a particular brand, service, or company, for the purpose of research and for reaching out to and maintaining contact with a larger audience. While many consider social media the ideal platform for advertising and marketing purposes, make sure you carry out careful planning and strategizing to get the most from social media interactions. Since it is very easy for consumers to screen out or block unwanted content, you should cautiously reach out to your customers.



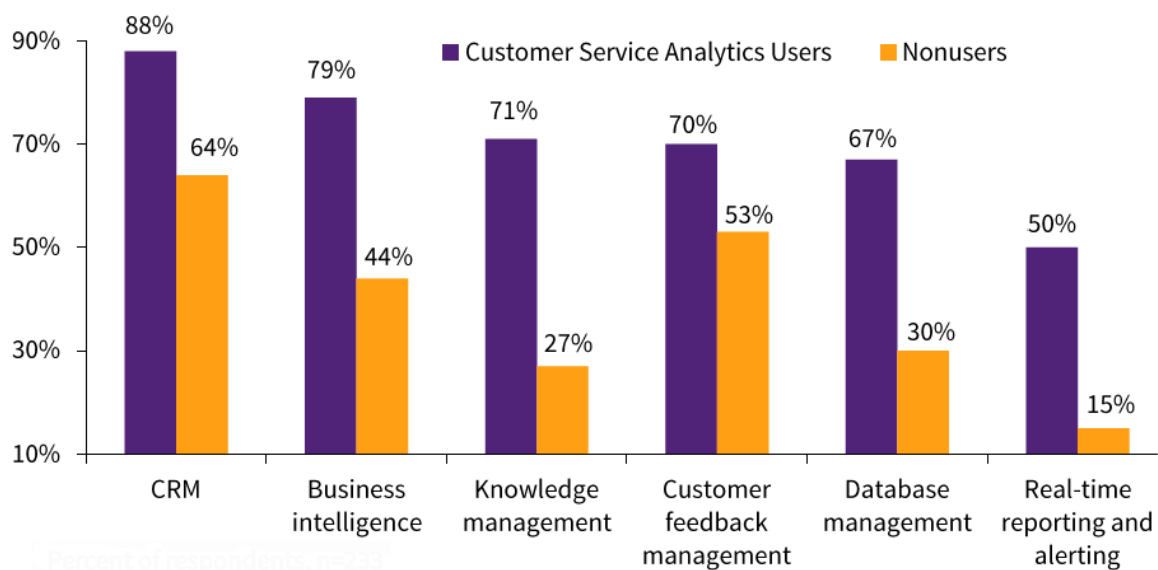
Connect with your customers:

Modern CRM systems optimize the power of social media interactions, helping you get closer to your customers. Instead of simply managing customers, they facilitate collaborative experiences that customers value. So rather than dealing with data and information, shift your focus to customer conversations and relationships. Through Social CRM, you can build online communities and create innovative social programs to improve customer care, as well as streamline customer research.

Get useful insights: Using simple analytics, you get insight into success and failure patterns that are inherent in the sales practice, empowering your sales team with direction on which tactics and strategies work best. Moreover, social media platforms like Facebook and Twitter play an integral role in helping you understand customer issues to take timely action. Regular users of CRMs develop skills and capabilities to understand customers at every point of the customer journey. If you

are looking to embrace analytics to track customers through their entire lifecycle, gain insight into customer behavior and interactions, and improve conversion rates to enjoy better customer loyalty, it's time to opt for a CRM application.

Figure 5: Technology is a Key Ingredient of Customer Service Analytics



Source: Aberdeen Group, April 2014

Top Tips for Getting Started With Customer Service Analytics

Ask Insightful Questions: Move over traditional selling, as the days of insight sharing are here. It's time to reframe the conversations you have with your account managers, help desks, or field personnel. Focus less on transactional communication and product portfolios and more on insight sharing and value-based solutions. Ask the right questions regarding top challenges they're facing while communicating with customers, what they'd like to improve, and what your customers have to say.

Common questions may include:

1. What roadblocks do you face while managing and accessing relevant data so as to enable actionable intelligence?
2. Can you collect data spanning your customer's entire journey?
3. How do you continuously take feedback in order to fine tune the analytics platform?
4. Are you getting the predictive analysis from your current platform-? The goal is to please your customer every single time.
5. Can you personalize your interactions with a customer every time?

After multiple conversations, you will be in a position to uncover patterns and common links which can later be analyzed and interpreted.

Understand Data: Marketers today are drowning in data but are struggling to figure out what's meaningful or not. Making sense of data is crucial to understand the customer journey and help you optimize your spend as well as the experience you offer to your customers. Do not underestimate the power of your current data; it doesn't have to be complete to be valuable.

Turn Predictions into Actions: To turn predictions into actions, start with the objectives: what outcomes do you need for your business? Understand the various aspects of your

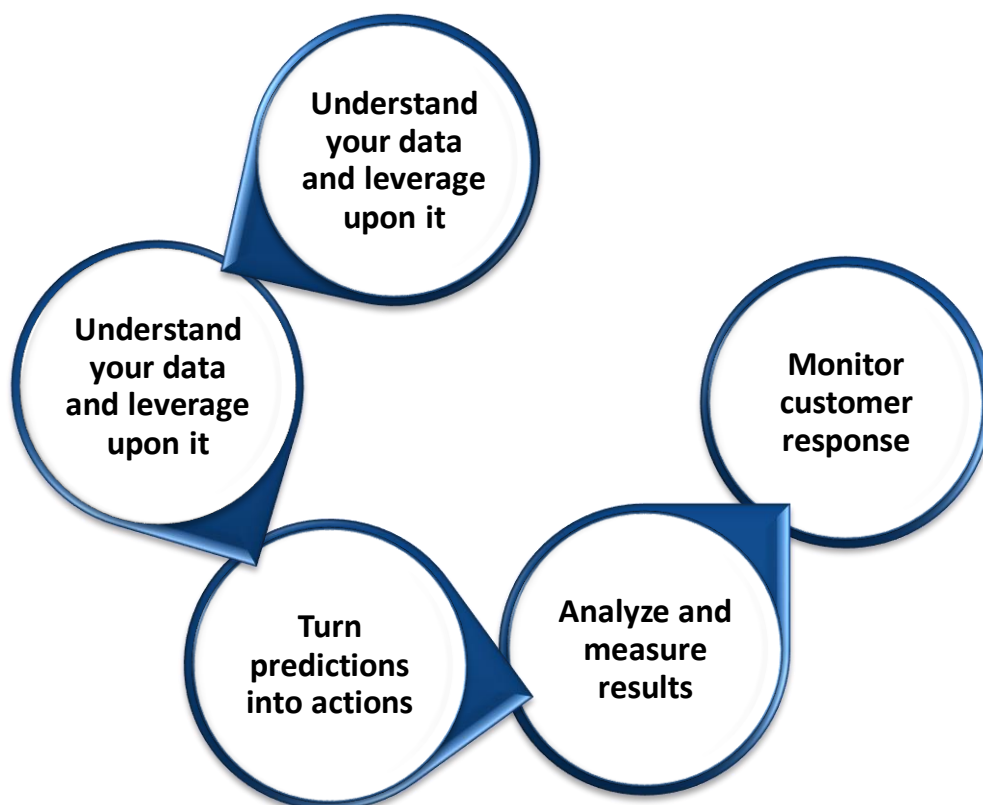


businesses by closely studying the insights – your most profitable products, your most profitable customers, growth opportunities in the market, and the most effective sales channels and create an action plan accordingly.

Analyze and Measure: To successfully measure the performance of your actions, make sure you identify and focus on the right areas of business. What is your customers' average purchase size? What is their lifetime value? How much do you spend on acquiring new customers and how much on

retaining them? Identify your KPIs and work on aspects that score low in order to improve your business outcomes.

Monitor Customer Response: A good customer experience is a leading indicator of business excellence. Monitoring customer response and measuring their satisfaction levels has positive impact on the overall experience that the customer has with your business. Use the right metrics to accurately track individual elements of the customer experience and calculate your customer satisfaction rate.



Top Tips for Getting Started With Customer Service Analytics

Metrics That Matter

“You cannot manage what you don’t measure.” Effective performance measurement is not just a requirement, but a pre-requisite for effective decision making. Today’s customer service technologies and reporting systems make it easy to capture a 360 degree view of performance data. Customer service agents and managers need to track and trend performance, detect, diagnose, and rectify performance problems, establish performance goals, and allocate accountability for achieving the goals.

The true potential of KPIs can be unlocked only when they are used not just to measure performance,

but also to detect and understand underlying drivers for performance gaps, identify your strengths and weaknesses, benchmark your performance over peers, and establish performance goals to improve your customer service. By tracking and monitoring key performance indicators (KPIs), you can measure, manage, and continuously improve your customer service. We’ll take look at some key metrics that matter the most, when it comes to ensuring optimum customer service. We’ve also included some screen shots from Microsoft Dynamics CRM so that you can see how this should look when viewing the analytics from a CRM.



1. Total Channel Volume: Customer service desks are all about tickets. A simple report of your monthly channel volume will indicate the total number of tickets you have received and how many you have been able to handle. Understand the capability and efficiency of your support process and get insight on improving your throughput.

2. Tickets by Channel: Your customer service desk may support multiple channels of incoming communication including email, phone, and live-chat. A report on channel-wise ticket inflow will show what mode of communication your customers prefer the most. Use this metric to gauge what channels require higher concentration of staff and what channels require lower investment.

3. Average Response Time: A critical factor in running a high performing service desk is responsiveness. Even

if a complete resolution requires a few days, customers expect immediate response. One way to measure this is to calculate the average response time: for instance, the time it takes from the moment a customer makes a request to the time your agent picks up the ticket.

4. Average Resolution Rate: While responding to a customer request is essential, it is also always good to resolve their issue in the most efficient manner possible. By calculating the total time it takes to resolve an issue, you can get insight into service desk performance and ensure happy customers.

5. Abandonment Rates: If you receive too many customer issues or if your customer service team is understaffed, there are chances that your customers will have to wait for a long time before their queries are even responded to. In such situations, there is a high likelihood of abandoned calls, which will only

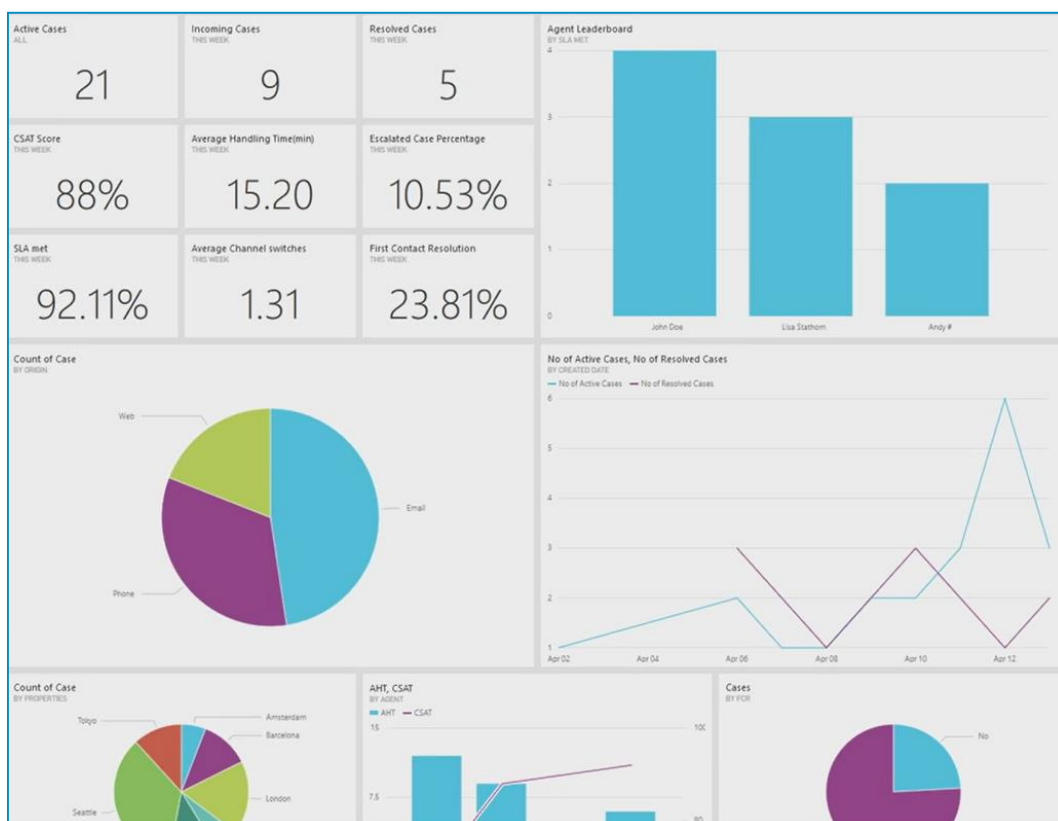
+ NEW CASE 📞 PHONE SUPPORT 🗑 DELETE ▾ 📄 RUN REPORT ▾ 🏠 ADVANCED FIND 📄 EXPORT TO EXCEL 📄 IMPORT DATA ▾ ...					
➔ All Cases ▾					
✓	Case Title ↑	Case Number	Priority	Origin	Customer ▾
✓	Average order shipment time (sample)	CAS-01000-W9L5S5	Normal	Web	Litware, Inc. (sample)
⊕	Complete overhaul required (sample)	CAS-01001-T5V6K0	High	Web	Paul Cannon (sample)
📞	Contact information requested (sample)	CAS-01002-L3H6Y2	Normal	Phone	Alpine Ski House (sample)
📞	Contact information required (sample)	CAS-01003-W2Z4S8	Normal	Phone	Blue Yonder Airlines (sam..
✉	Damaged during shipment (sample)	CAS-01004-B0H0Q6	Low	Email	Yvonne McKay (sample)
📞	Defective item delivered (sample)	CAS-01005-T6F8T9	Low	Phone	City Power & Light (samp..
📞	Delivery never arrived (sample)	CAS-01006-W2R7Z6	Low	Phone	Alpine Ski House (sample)

lead to dissatisfied customers. By scrutinizing your call abandonment rates, you can better forecast and schedule for peak call times, ramp-up your staff accordingly, improve your in-queue messages and have efficient call-back technology in place to ensure all your customers are attended to in time.

6. Agent Utilization: It's equally important to assess and evaluate the performance of your staff to calculate the agent utilization rate. By generating a report on staff performance, you can gauge individual performance and can also identify if any staff member is overloaded, which will help you tweak your ticket assignment model accordingly.

7. Number of Resolved Tickets: With reference to the first metric, ticket inflow should be uniformly matched with ticket resolution. If the ratio of ticket resolution to ticket inflow is low, it indicates that either you are understaffed or your staff is insufficiently skilled to handle the volume and diversity of support requests.

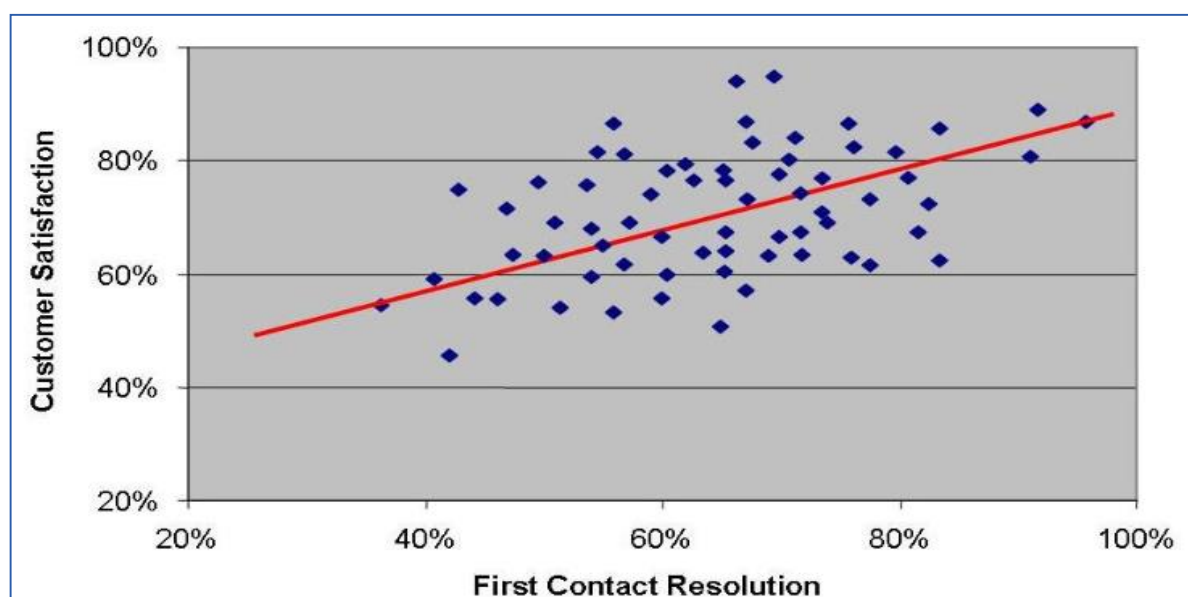
8. Top Customers in Need: There are some customers who keep coming back with queries. While some of them might be first time customers, there are others who've had a long and meaningful relationship with your brand. Customers who are happy with the service you provide are likely to stick around and do more business with you. By analyzing your top



customers in need, you can ensure their queries are attended to in the quickest and most efficient manner and ensure good customer service.

10. Average Wait Time: The time taken for complete resolution of a customer issue is an essential metric to decide whether your customer is going to be happy with your support. By calculating the time between a ticket arriving in your service desk system and being resolved completely, you can calculate mean resolution time and improve the metric based on performance.

11. Customer Satisfaction Score: Calculating customer satisfaction score is crucial for ensuring happy and loyal customers. Since there is a strong correlation between first contact resolution (FCR) and customer satisfaction, understanding the number of customer issues that were resolved on initial contact with the customer is essential. You can employ a variety of initiatives to improve FCR which will have a direct impact on customer satisfaction scores.



Summary: Offer Superior Customer Service

In the era of the empowered customer, superior customer service is crucial for success. If your company excels in delivering targeted and timely service across multiple channels, you can enjoy substantial gains over those who do not. Customer service analytics incorporates the use of state-of-the-art technologies like business intelligence, Big Data analytics, predictive analytics, and real-time analytics to make data-driven decisions. They help you convert customer data stored in various mediums like ERP and CRM systems,

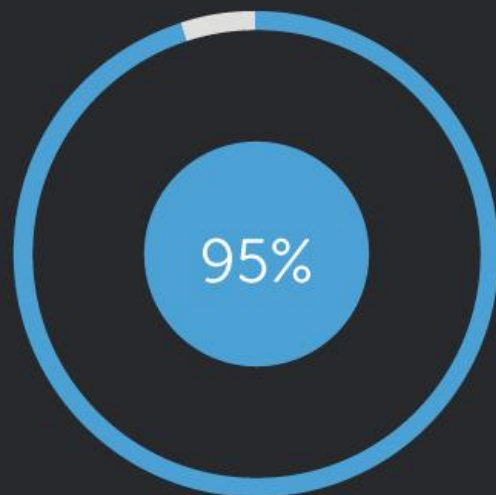
e-mails, call records, and social media into meaningful data. They enable you to design, prioritize, and implement customer-centric business strategies, making them the foundation for sustaining great customer support and predictive experiences.

Customer service analytics users are 39% more satisfied with their ability to make data-driven service decisions compared to non-users.

95%

of dissatisfied customers tell others about their bad experience.

Source: Dimensional Research



About Indusa

For global midmarket organizations, Indusa is an innovative technology partner that provides end-to-end enterprise software solutions and services to deliver business results, improve productivity, increase efficiency, and reduce costs. With offices in the United States and India, Indusa has a global team of experts to deliver transformative technology solutions to meet all of the needs of our clients from consulting to maintenance, in our core practices – Microsoft Dynamics AX ERP, Dynamics CRM, SharePoint, O365, Cloud, Enterprise Mobility, QA/Testing, and Custom Application Management.

Quick Facts

- Established in 1989: over 25 years of experience
- Headquartered near Chicago (USA) with development centres in India
- Microsoft partner with Gold and Silver competencies
- Blended delivery model as per your comfort: onsite, offsite, offshore, or a mix
- Over 90% of team working on Microsoft-related technology projects are certified
- Microsoft CSAT index: 100% on KPIs
- 80% of our customers stay with us for over 8 years



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