# OTRS

From learning to loyalty:

7 Actions Customer Service Leaders Are
Taking Today to Drive Revenue

For today's businesses, there's a lot of uncertainty as disease, politics, supply chains and economic impulses flow from one side of the globe to another bringing with them opportunity and upheaval. To survive, businesses need all teams focused on meeting customers' needs and driving revenue.
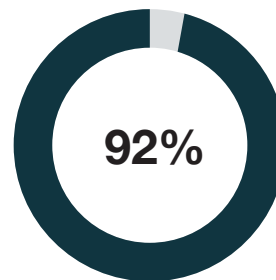
500 global customer service leaders were surveyed to find out what they are doing today to support their business's revenue goals, and there's no doubt that this is what they've been tasked with.
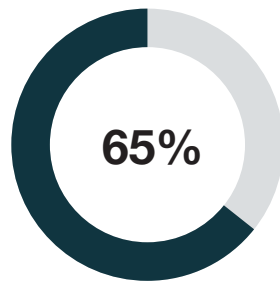
65% Customer service has significant role in improving retention.

254/500 Customer service teams improve monthly active users.

92% Are expected to make customers aware of additional products/ services.

Data is Power

When agents have accurate and complete customer data available they provide better support to customers.

Having the right data at the right time matters… a lot! From improving internal communication to integrating systems, there are thousands of activities taken daily to help improve internal processes.

Better support for customers has been the result of:

**40.50%** — Agents have access to complete and accurately recorded customer data.

**39.31%** — Provide context-based help information to agents during customer service.

Other possible answers included 14.20% for a defined internal process to escalate issues (e.g., an incident or issue reported by multiple customers) and 13.69% voted for the possibility for customers to make their own appointments with the support team.

Data tops the priority list for many

Customer service leaders are prioritizing the use of customer data over topics like agent satisfaction and improving internal processes.
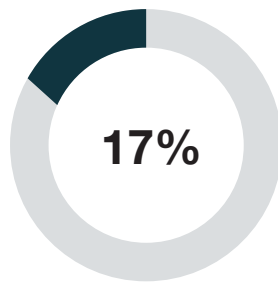
17% focused on improving use of customer data
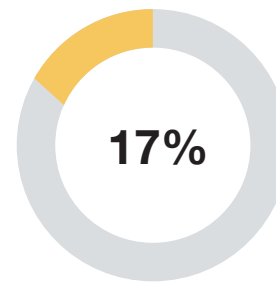
17% Connecting data from multiple systems is the focus of customer service leaders.

Actions to Take

Demand data collection. When other teams don't see the value in why they are filling out forms, they will skip them or input less accurate data. Talk to them about how data helps.

Use forms and templates. 16.67% leaders use forms and templates to help customers and agents form more complete requests. Whenever possible, use these so that your data can be more easily repurposed.

Integrate a customer database. If you haven't already done so, pick a tool for request management that also includes a customer database. This makes it much easier for agents to access customer information while working on cases.

One Voice, All the Answers

Speed and consistency. That's what customers demand.

For businesses, this means that everyone in the company needs to have precise information quickly — a huge challenge for growing businesses. Automation helps avoid mistakes and speed up workflows.

24%
automating internal processes has been most successful for helping their organization better communicate with other departments.

17%
are making internal process optimization a priority.

28%
say providing direct communication channels for support to reach product/service experts or vendors has improved communication internally.

Case study

Automated workflows eliminated request bottleneck for Bemol. Escalations are seamless.

"Today, we were able to receive demand, track and manage requests and authorizations, and navigate among the 15 business units responsible for the solution. Our response time is a critical factor, and requests do not disappear or go unanswered [now]," explains Jesaias Arruda, Infrastructure Manager.

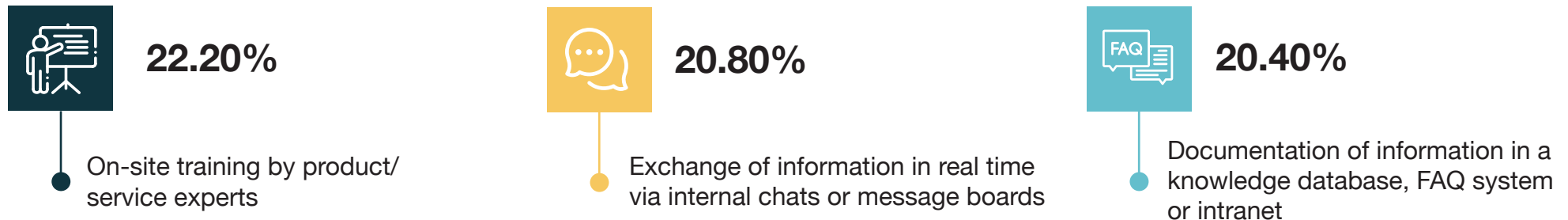Bemol processes 5,900 requests per month.

It's Not What You Know

It's knowing where to find it.

Ironically, agent knowledge doesn't top the list of things that are necessary for delivering great service. In fact, only 16.82% said that this matters. WOW!

Modern companies are instead providing tools and pathways so that agents get answers faster and easier.

22.20% On-site training by product/ service experts

20.80% Exchange of information in real time via internal chats or message boards

20.40% Documentation of information in a knowledge database, FAQ system or intranet

Actions to Take

Establish a knowledge base. Develop a searchable collection of information about what you sell, policies and procedures, troubleshooting practices, etc. Agents don't have to remember everything if they can find it fast.

Examine escalation paths. Document and diagram approval workflows. Determine the most effective way to pass a case along to level two – and don't forget to close the communication loop with the customer! Automate it all.

Promote a customer-centered culture. Help other departments see their impact on the long-term relationships that are built with customers – be that through taking time to train the support team, having channels for the customer service team to share feedback with the product team or using your own products with the team.

Happy to Help. Just Tell Me How.

When it comes to positively impacting the **customer's experience**, leaders were clear about the success they have had in using self-service tools.

69% said customer satisfaction increased

49% said agents spend more time with each customer
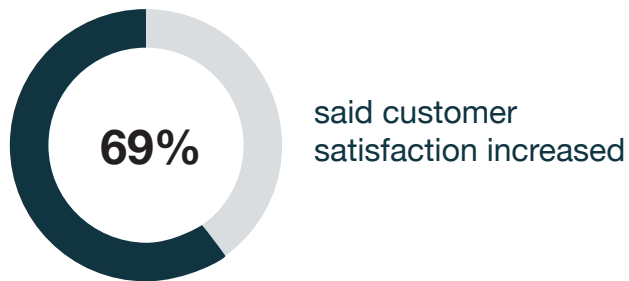
Customers most appreciated being able to place an order or complete a purchase online as well as being able to access the support team through a dedicated portal. **For agents**, the experience was similar:
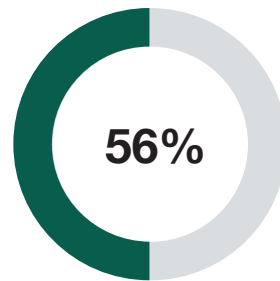
56%
Enable customers to complete order transactions online/on their own.
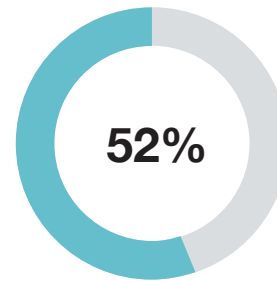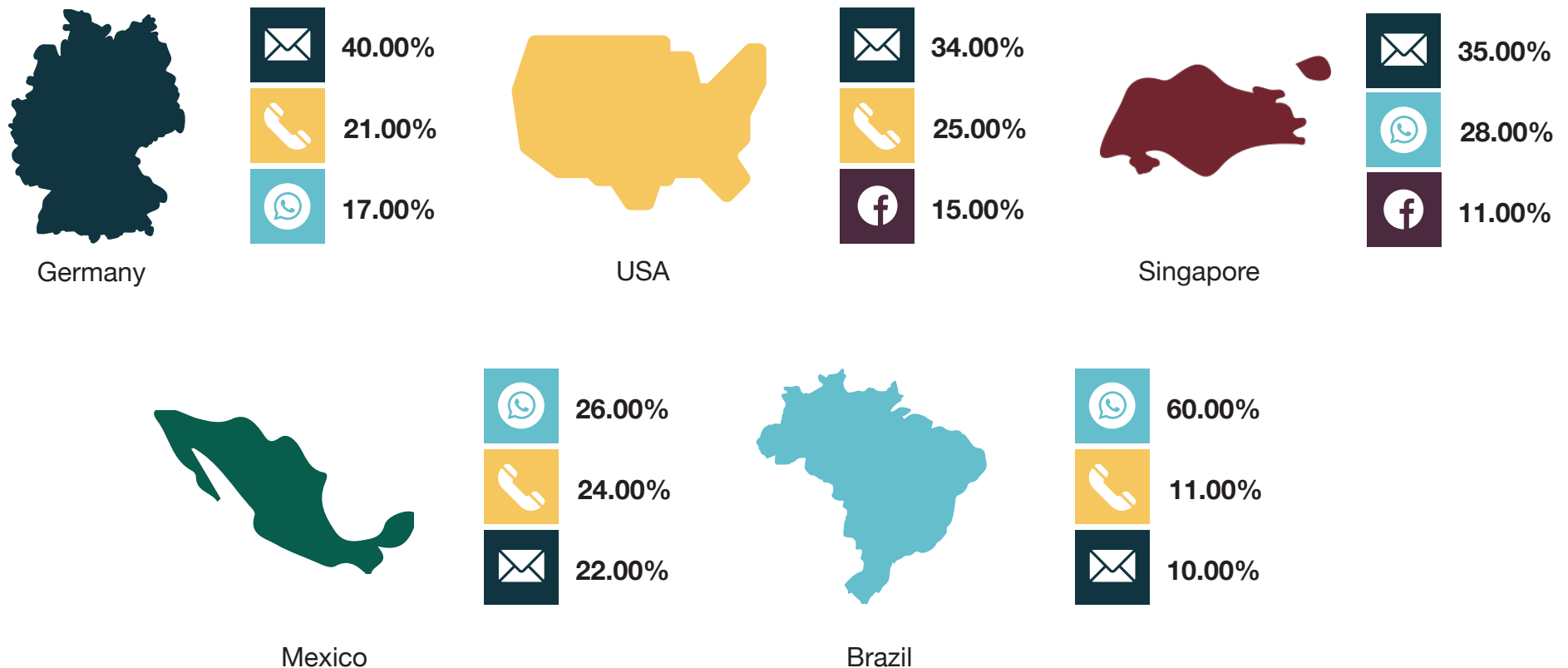
52%
Enable customers to send inquiries via an online portal.

The Ouch in Omnichannel

Omnichannel communication has been a lofty goal for a while, yet customer service teams still struggle to meet their customers where they are at.

17.60% say one of their biggest issues is connecting with customers on the channels they prefer.

Part of the challenge is that there are so many channels! The survey inquired about nine of these – and what people are using most often to provide support changes around the world.

Germany
- ✉ 40.00%
- 📞 21.00%
- 🟢 17.00%

USA
- ✉ 34.00%
- 📞 25.00%
- f 15.00%

Singapore
- ✉ 35.00%
- 🟢 28.00%
- f 11.00%

Mexico
- 🟢 26.00%
- 📞 24.00%
- ✉ 22.00%

Brazil
- 🟢 60.00%
- 📞 11.00%
- ✉ 10.00%

Actions to Take

Implement a customer portal. Both agents (20.58%) and customers (20.46%) find that having a dedicated portal for customer support that's easily accessible online is helpful. It's a single stop for customers where they can trust that their requests are captured, can access a knowledge base and even get up-to-date information about products/services. It's something they can rely upon to be "always there" so that they get help exactly when they need it.

Consolidate communication. Ideally, service agents shouldn't have to monitor multiple channels. By bringing all of the channels together into one service management platform, agents can manage communicate from a central location; customers can pick and choose how they reach out for help – email, chat, social media, etc.

Growing Word of Mouth Leads

Happy loyal customers share their experiences with other people and businesses.

Already, some customer service teams share responsibility for the NPS (net promoter score), which is an indicator of customer loyalty.

19%
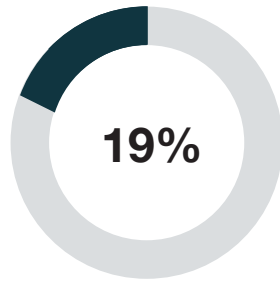
have partial responsibility
for NPS

We see this as growing over time as businesses begin to focus more and more on growing the long-term value of a customer during these periods of uncertainty. Start taking the recommended actions above today so that you too can retain long-lasting relationships with loyal customers.

Survey demographics

500 men and women, aged 25-54
Located in United States, Singapore, Germany, Mexico and Brazil
Position levels were supervisor – director in a customer service organization
Most had between 50-5000 employees
Data from 09.15.22.

Visit OTRS.com for information on customer service management software.