+ableau

Drive service-center success

Tableau empowers CSPs
to deliver greater customer
satisfaction with data

salesforce

Create the complete 360-degree customer experience

Customers today know what they want: personalized, seamless, and simple interactions with their Communications Service Providers (CSPs), regardless of channel. But when 83 percent of CSP systems are not integrated, meeting these expectations becomes a challenge.

And while rising customer expectations aren't new, there are new technologies available to help companies meet their customers' needs. The last two years revealed the downside of operating with multiple point solutions; growing your business and connecting with your customers is difficult when your data is disjointed and fragmented on the backend.

Siloed data sets and disconnected legacy systems make it difficult for CSPs to achieve the type of customer experience that drives profit and growth. As a result, they're seeing shrinking revenue, higher churn rates, increasing competition, and decreasing Net Promoter Scores (NPS) and Customer Satisfaction Scores (CSAT)–all of which open the door for other digital-first operators to compete.

Providing a seamless customer experience will continue to play a larger role in C-level strategy. The CEO, CXO, CMO, and COO must work collaboratively and embrace a data-driven strategy to transform their company's service and protect the bottom line.

To retain customers, stay competitive, and build brand loyalty, CSPs must make the customer experience their top priority: a few basis points' swing in churn can dramatically impact the bottom line.
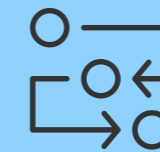
76% of customers expect seamless experiences across all channels, whether dealing with a service agent or a retail associate

63% of service professionals struggle to balance speed and quality service

79% of service professionals say it's impossible to provide great service without a complete view of the customer

Source: Salesforce Fourth Edition State of Service

1.
Create connected customer experiences

Today's customers expect CSPs to know who they are and provide personalized, proactive service across channels. Fortunately, technology can help them meet these demands. Moving from today's fragmented customer experience to tomorrow's connected experience requires a data-driven approach that encompasses people, processes, and technology. CSPs need to unify their data and streamline service operations to create a single source of truth and streamline service operations to empower customer-experience agents and increase the speed of resolution. These improvements help create loyalty and positive business results.

Here's where Tableau and Salesforce can help. Tableau's Deliver Data-Driven Service solution provides a powerful analytics platform that empowers CSPs to drive greater success by enabling:

- Complete, unified view of the customer
- Personalized, proactive service
- Consistent, omnichannel experiences

Single source of truth gives AT&T the power to connect experiences for each customer

Business Challenge

AT&T had an ambitious vision to provide a connected experience for millions of customers across every channel and touchpoint.

Tableau + Salesforce Solution

AT&T Customer Connect, powered by the Salesforce Customer 360 platform with Sales Cloud, provides sales teams with information and insights to deliver the best customer experience–accessible anywhere, anytime.

Results with Tableau

- Reps capture leads that are scored and assigned a next-best-action using AI-powered recommendations from Tableau CRM.

- AT&T follows up on these leads with personalized, automated journeys in Marketing Cloud across SMS and email to keep potential customers engaged.

- Service Cloud empowers teams with the right tools to deliver a consistent service experience across channels.

- All data is integrated across systems and retail stores using Mulesoft, ensuring customers receive the same personalized service across all interactions.

2.
Empower service agents with data

How much does customer service impact the bottom line? Consider this: 91 percent of customers say they will make another purchase if the service is good. But when service agents have to swivel-chair from system to system to access information or manually perform processes, customers feel the impact of disengaged agents, incomplete data, and long wait times.

Agents need a complete customer view to provide actionable insights that help them provide better, more personalized service. Easy-to-use Tableau technology delivers the broadest and deepest capabilities available today: CSPs can connect, prepare, and verify all their data; visualize it to get the best and most relevant insights; and then share and collaborate across the organization so people can act.

A blind survey showed that customers experienced these success metrics:

Up to 37% faster time to resolution

56% increased service-call deflection rate

Up to 40% increased self-service resolution (chat, SMS, social, etc.)

Up to 53% increased ARPU

35% faster decision-making

Source: Tableau Customer Success Metrics Datasheet

Empower agents with intelligent response

The following use case demonstrates how the Tableau solution supports agent empowerment.

> A Tableau for Communications dashboard provides management with an overview of their service operations' performance and reveals that a top agent's average time to resolution has increased.

> The customer page provides up-to-date customer information, historical trends that impact NPS, ARPU, average handling time, repeat calls, cross-sell and up-sell opportunities, and personalized recommendations to help streamline the customer experience.

> In this example, the customer has always had a great NPS, but this view shows that her NPS is suddenly trending negatively.

> This trend prompts the team to dig deeper into the most recent case.

> They learn that the customer erroneously received an email offering a service not available in her region, leading to confusion and frustration.

> The Customer Service Regional Manager notices that this happened to a cohort of customers and quickly puts together a talk track and an offer for his agents to leverage when speaking to affected customers.

> Service agents are empowered with resources to identify and proactively reach out to impacted customers with the offer.
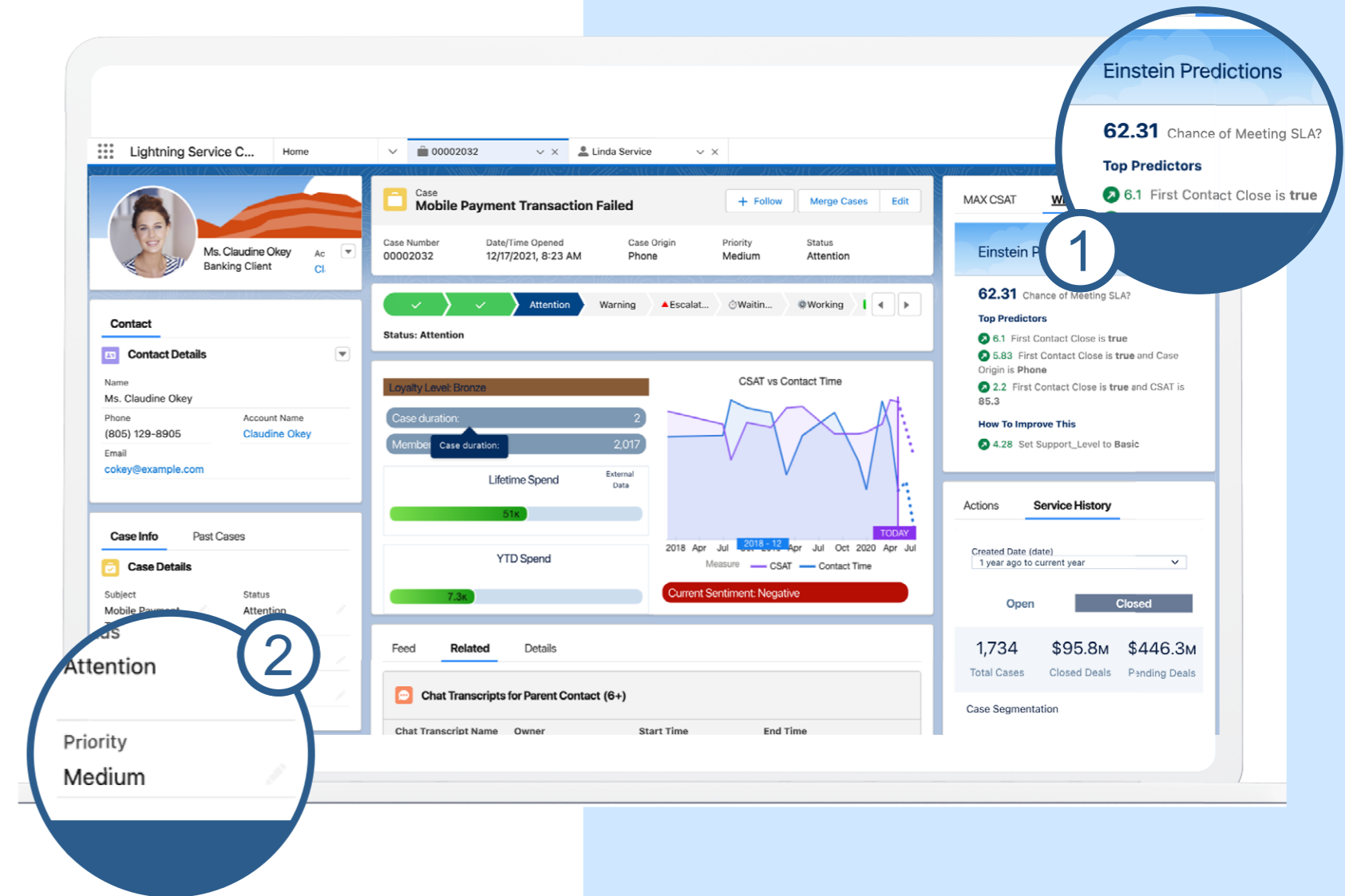
Verizon reduces support calls, focuses sales productivity experiences for each customer

Business Challenge

Verizon Fios used manual Excel tables to analyze data like digital and call center metrics. Results were distributed to teams in static reports. Joining data before analysis proved challenging, with multiple sources, including Oracle, Hadoop, and Teradata. Limited analytics resources and a large set of stakeholders created bottlenecks and redundancies and prevented users from easily accessing data to answer questions.

Tableau + Salesforce Solution

Verizon created an 80-person Analytics Center for Excellence (ACE) where 30 members perform analysis in Tableau and deliver insights to key stakeholders. Other members support data governance, data prep, and modeling before handing off to Tableau developers and server administrators.

As dashboard usage increased, the team became more effective at finding insights using features like Tableau Tooltips, reflecting details within the visualizations, and clarifying field definitions. Stakeholders–from executives to customer-facing call-center staff–now use these daily insights to make more informed decisions and deliver excellent customer service.

Results with Tableau

- Reduced service analysis time by 50 percent with faster customer insights for management

- Increased efficiency by reducing call volume by 43 percent, customer visits by 62 percent

- Refocused sales reps on solutions rather than products

- Helped sales staff identify white-space opportunities

3.
Empower service agents with data

Companies that adopt a data-first strategy gain the agility and ability to respond efficiently to demands on the call center. Complete, up-to-date data is critical for driving collaboration, boosting productivity, and creating better customer experiences.

Adopting a data-driven strategy enables CSPs to transform their service operations from a cost center to a profit driver. Tableau's Deliver Data-Driven Service for Communications solution empowers CSPs to deliver high-quality service by:

- Bringing together all data sources into a single dash-board

- Empowering customer service agents to become customer-experience experts

- Enabling agents to make smarter decisions by providing deep, actionable insights

- Mining data to drive cross-sell and up-sell opportunities

From Analytics to Action

This use case demonstrates how the Tableau solution supports operational excellence.

> Management tags the company analyst in a dashboard to explore a concerning customer trend.

> The analyst browses certified data sources, finds related data sets, and discovers related dashboards.

> The analyst merges information and filters to focus on the region of interest—in this case, the Midwest.

> Narrowing focus, the analyst uses Tableau to verify findings and identify customers for proactive outreach.

> With the dashboard created and the short list of customers identified, the analyst publishes findings and tags management to review and implement a remediation plan.

Telstra maximizes value from Salesforce Customer 360

Business Challenge

Telstra lacked a 360-degree view of its customers. Inconsistent, fragmented data made pipeline and revenue forecasting difficult. The company wanted to speed time to development and deliver new technology and features to users. Previously, it deployed just four releases per year. Telstra also wanted to extend the value of Salesforce by leveraging best practices, ensuring adoption, and better using its customer data. The company needed a new way to measure and demonstrate business value.

Tableau + Salesforce Solution

Salesforce Professional Services helped Telstra define and deliver a roadmap to improve the experience of its partners, employees, and customers. It helped transform the way Telstra delivers new solutions and consulted on a new framework for measuring business value. The Professional Services team helped upskill Telstra's technology team with training and support to drive adoption of Salesforce across the business. Sales Cloud provides a 360-degree view of enterprise customers and enables teams to collaborate to provide more impactful customer interactions. It also provides sales teams with real-time sales cadence and forecasting data. Tableau CRM (Einstein Analytics) streamlines reporting and provides business divisions with a dashboard that helps managers and front-line employees stay focused on what's needed to achieve KPIs.

Results with Tableau

- Increased the frequency of technology deployments from four times per year to three times per week, reduced cycle time to prepare for these releases from six weeks to 48 hours, and minimized the duration of releases to two hours or less

- Increased speed of service, including 50 percent decrease in average case duration

- Increased efficiency of managing customer contacts, saving 30 seconds per contact—equivalent to 26,000 minutes

- Increased breadth of partners on Experience Cloud, resulting in 12x YoY contract growth attributed to this channel; Telstra has also managed 3,100 partner cases on Salesforce, saving 13,000 minutes

- Increased adoption of Salesforce across more business lines, resulting in 76 percent increase in daily active users YoY

The winning approach:
A data-driven service strategy

To satisfy customers, service agents no longer need to scramble to track down information across multiple sources. Now they can respond quickly, accurately, and intelligently—resolving inquiries faster and amplifying their productivity.

In a climate where service is central to every CSP's bottom line, growth, and very survival, the Tableau Data-Driven Service for Communications solution lets them give customers what they want: an outstanding service experience across every channel, every time.

In the face of increasing competition, heavy regulations, and changing consumer demands, Tableau empowers CSPs to achieve and maintain a competitive advantage by enabling them to:

- Unify and synthesize all data sources into a single dashboard

- Empower teams with the right data to deliver personalized, proactive customer service

- Boost productivity with AI-powered recommendations and automation

- Identify cross-sell and up-sell opportunities

- Identify new revenue streams

- Reduce complexity and IT costs

- Scale to the entire organization while ensuring reliable, up-to-date, and secure data

About Tableau

As the business intelligence platform for more than 90 percent of Fortune 500 financial services companies, Tableau is the proven solution for organizations that are focused on leading with data. Tableau provides a complete, integrated analytics platform that enables teams to work collaboratively and gain deep insights from their data using machine learning, statistics, natural language, and smart data prep. With enablement resources, including training, certifications, and Tableau Blueprint, not to mention inspiration and support from the passionate Tableau Community, companies who choose Tableau can be confident their deployment will be a success and lead them to data-driven culture.

About Salesforce

Salesforce is the world's #1 CRM platform–integrating every part of a company's interactions with customers including marketing, sales, service, commerce, HR, and much more. As part of the Salesforce family, Tableau is designed to connect seamlessly with products across the Customer 360 platform. This allows you to use Tableau to blend Salesforce data from any cloud with your other business data for a complete view of your customers. Put customers at the center of everything you do, and deliver the connected experiences they expect.