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2017 Customer Support & Experience Benchmark

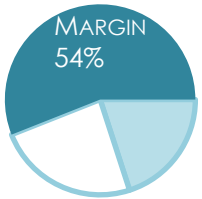
Results

Looking Into 2017

Value

TSC

1



BENCHMARK
YOUR PERFORMANCE IN KEY FUNCTIONAL AND STRATEGIC AREAS VIA AN ASSESSMENT AVAILABLE POST-BENCHMARK SURVEY.

2

ACCESS
RESEARCH DATA
TIED TO YOUR RESEARCH GROUP AND MORE. THE DATA WILL ALSO BE PRESENTED THROUGH THE LENS OF THOSE WITH THE TOP PERFORMANCE METRICS

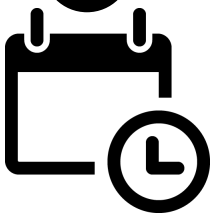
3

REVIEW **CONTENT AND INSIGHT** FROM OUR ANALYST TEAM

4

CONNECT WITH A **COMMUNITY** OF LIKE MINDED PROFESSIONALS AND TSC-RECOGNIZED SUBJECT MATTER EXPERTS

5



ATTEND **EVENTS** FOR OVERALL KNOWLEDGE OR SPECIFIC TO YOUR AREA OF INTEREST

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- L — Leadership and Strategy
- S — Safety
- P — Parts
- W — Workforce & Talent
- C — Customer Experience
- F — Field Service
- D — Data
- T — Technology
- SM — Sales and Marketing

TSC 2017

TSC Research Groups (Service Councils)

Note: Research Topics might overlap across research groups.

TSC-C
2017

Customer Support and Experience

–Results (40 Organizations)

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About Survey

Early 2017(Still Live)

- 40 respondents
  - *By Revenue*
    - *<$100m – 18%*
    - *$100m-$1b – 22%*
    - *$1b+ - 60%*
  - *Regional Focus (Survey):*
    - *North America – 77%*
    - *Global – 23%*
  - *Industries*
    - *Healthcare/Medical*
    - *Software/Hardware*
    - *Construction*
    - *Industrial Manufacturing*

Planned Output

- Aug – Sept 2017

About the Project

Looking into 2017

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TSC-C 2017

Areas of Focus

SELF-SERVICE PRESENCE AND CONTENT	**55%**
OPERATIONS – PROCESS REVIEW	**48%**
TECHNOLOGY – REVIEW AND UPGRADE	**48%**
OPERATIONS – PERFORMANCE MANAGEMENT	**45%**

ANALYST NOTE:

In research conducted in late 2016, more than 40% of organizations indicated that they were planning to add self-service functionality for their customers in the near future. This continues to be a trend that's top of mind for service organizations, even those in the industrial realm.

Other Top Results:
- Knowledge Management – 41%
- Feedback Management – 31%
- Talent Development – 32%

OUR TAKE:

Self-service is an intriguing option for service organizations for two primary reasons:
1- Support centers are spending time fielding simple service requests that could/should be automated
2- Customers are demanding greater visibility into information tied to their service relationship

The sudden demand for self-service resources has taken several organizations by surprise and they don't have the infrastructure in place. The first step for these organizations is a thorough evaluation of what content can and should be made available via a self-service resource page or portal and the communication and education necessary to ensure that customers leverage these self-service resources.

Question: Which of these areas are you focusing on in 2017?
Percentage of Respondents Source:
TSC Data June 2017

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TSC-C 2017

External Disruptors

WORKFORCE AND TALENT AVAILABILITY	**55%**
CHANGING CUSTOMER EXPECTATIONS	**52%**
COMPLEXITY OF PRODUCTS	**48%**
ADVANCEMENTS IN TECHNOLOGY	**38%**

ANALYST NOTE:

The question asks about external factors disrupting the service and support business. For the CEx realm, the changing customer expectations piece is the most relevant.

Other Responses:
- Increasing customer demand for support – 31%
- Proliferation of new support channels – 28%
- Increasing competition – 28%

OUR TAKE:

Its easy to say that support organizations need to do more with less when it comes to service and support delivery. The challenge comes in when service organizations are losing talent in the field and technical support arenas and are faced with an increasingly complex portfolio of service products. The issue isn't just around knowledge retention and transfer, but its about ensuring that there is a sustainable structure in place to support all the service needs and requests of serviceable products.

Technology offers an opportunity for organizations to address the talent and support imbalance, but organizations often find themselves in a vicious cycle of managing the technology vs. solving the problems that the technology was put in for in the first place.

It is also extremely difficult for organizations to pin point the future needs of service customers. Experience expectations are being disrupted by the like of Amazon and Uber, yet there is no desire for customers to pay more for these enhanced experiences. They are expected.

Question: Which EXTERNAL forces will impact your business?
Percentage of Respondents
Source: TSC Data June 2017

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Internal Challenges

INADEQUATE VISIBILITY INTO PERFORMANCE INFORMATION	**45%**
INADEQUATE IT SUPPORT	**41%**
LACK OF RESOURCES TO SUPPORT SERVICE DEMAND	**34%**
OUTDATED PROCESSES IN SERVICE DELIVERY	**31%**

ANALYST NOTE:

Other responses:
1- Lack of integration between business functions – 28%
2- Aging technology infrastructure – 28%
3- Cultural mis-alignment in organization – 21%

OUR TAKE:

In TSC's 2017 Leadership and Strategy Benchmark, customer experience improvement was touted as a major initiative for 2017. As organizations assess their capabilities to match the CEx vision, they realize their infrastructure has mostly been neglected. Therefore, in addition to building new tools for arenas like self-service, organizations are also looking to evaluate the tools for:

- **Customer interaction management**
- **Agent productivity**
- **Multi-channel support**
- **Voice of the Customer**

In driving the upgrade of the CEx infrastructure, it is vital that organizations look to connect their support and experience functions with other areas of the business. Within service and support, there is the opportunity to better link back-end support with customer-facing support. Beyond support, the opportunity to share customer service information with other customer touchpoints is also extremely valuable. Success-focused account management can only be built on a 360-degree view of the customer.

Question: Which INTERNAL challenges will have the most significant impact on your support business?
Percentage of Respondents
Source: TSC Data June 2017

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TSC-C 2017

What's Next

S Survey (Ongoing)
Drive to 50 Benchmarked Organizations

D Data Published (Aug)
- 2017 Priorities
- KPI Results
- Business Capabilities
- Service Champion Results (July)

R Research Published (Aug-Sept)
- Summary Report
- Key Takeaways
- Champions Report
- Champions Guides (How-To)

C

Q1 2017 | Q2 2017 | Q3 2017 | Q4 2017

Q4 2016: CEX NEXT FRONTIER

SURVEY: DEC 2016
OUTPUT: Q1 2017

Q1/Q2 2017: CEX BENCHMARK

SURVEY: MAR 2017
OUTPUT: Q2 2017

FOCUS KPIS:

- NPS
- EFFORT
- CSAT
- RETENTION
- LOYALTY

OTHER AREAS:

- INITIATIVES AND INVESTMENT AREAS
- CHALLENGES

Q2/Q3 2017: VOC - CUSTOMER EFFORT

SURVEY/INTERVIEWS: MAY 2017
OUTPUT: Q2/Q3 2017

FOCUS: TO UNDERSTAND HOW VOICE OF THE CUSTOMER DATA IS BEING USED TO IMPROVE THE CUSTOMER EXPERIENCE

TOPICS: VOC, RESPONSE RATES, CUSTOMER EFFORT, UNSTRUCTURED VS. STRUCTURED DATA

SMARTER SERVICES SYMPOSIUM

LIVE: SEPT 11-13

Q4 2017: PERSONALIZATION

SURVEY/INTERVIEWS: OCT 2017
OUTPUT: Q4 2017

FOCUS: IDENTIFY STEPS TAKEN BY SERVICE ORGANIZATIONS TO PERSONALIZE INTERACTIONS WITH THEIR CUSTOMERS.

TOPICS: PERSONAS, INTERACTION CHANNELS, INFORMATION SHARING

	Webcast	IdeaShare
JULY	**N –** NONE SCHEDULED	**27 –** COMBATTING AN AGING WORKFORCE (W. FS)
AUGUST	**9 –** CSAT, NPS, CUSTOMER EFFORT – WHAT MAKES SENSE? (C)	**29 –** IMPROVING WORKER SAFETY: NEW TOOLS & STRATEGIES (S)
SEPTEMBER	**21 –** SYMPOSIUM POST-EVENT (ALL)	
	28 – MOBILITY TRENDS FOR THE FIELD SERVICE ENTERPRISE (F)	**N –** NONE SCHEDULED (SMARTER SERVICES SYMPOSIUM)

2017 Smarter Services Symposium

Sept 11-13 in Chicago

www.servicecouncil.com/symposium2017