THIRD EDITION

State of Service

Insights and trends from over 3,500 service leaders and agents worldwide

salesforce research
For the third edition of our “State of Service” report, Salesforce Research surveyed over 3,500 customer service agents and decision makers worldwide to determine:

- Service organizations’ biggest challenges and priorities
- The changing role of customer service agents
- The impact of artificial intelligence (AI) on the future of customer service
- How mobile workers fit into modern customer service

Data in this report is from a double-blind survey conducted from November 27 through December 15, 2018 that generated 3,525 responses from full-time customer service agents and decision makers. Survey respondents are from North America, Latin America, Asia Pacific, and Europe. All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 54.

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).

Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.
About This Report

Throughout this report, data is examined relative to business performance to identify success patterns. High-performing customer service teams are those that rate their company’s customer satisfaction as excellent.

In this report, we refer to the following respondent groups.

**Decision Makers**
Service vice presidents, directors, and team leaders

**Mobile Workers**
Front-line field service workers who interact with customers “in the field” at a customer’s home or place of work

**Agents**
Front-line service workers who interact with customers either remotely or in the field, inclusive of mobile workers

**Service Professionals**
All survey respondents, inclusive of all groups above

### Breakdown of Service Performance Levels


- **Underperformers** rate their company’s customer satisfaction as average or below
- **Moderate performers** rate their company’s customer satisfaction as average
- **High performers** rate their company’s customer satisfaction as excellent
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Executive Summary

Faced with ever-rising customer standards for fast, personalized, and connected engagement – anytime and anywhere – customer service professionals have a completely different mandate than in the past. The C-suite has taken notice of how service can drive elevated customer experiences, differentiate brands, and drive new revenue streams. As a result, service leaders are investing in their people, processes, and technology to drive nothing short of a transformation.

Here’s an overview of the trends driving service forward.

01 | The Fourth Industrial Revolution Drives Service Transformation
With technology redefining their customers’ standards, the C-suite views service as a strategic asset. Priorities and budgets are following suit. Eighty-two percent of decision makers say their company’s customer service must transform in order to stay competitive.

02 | Agents Take a Step Up
Particularly among top teams, the service agent role is becoming increasingly important. Today’s agents are increasingly tasked with building relationships and driving revenue, and are swapping their mundane tasks for challenging, high-value work. Seventy-one percent of agents say their roles are more strategic than two years ago.

03 | AI’s Impact Takes Shape
Artificial intelligence (AI) is viewed by decision makers and agents alike as a boon to customer and employee experience. AI adoption is nascent, but is set to soar as more teams turn to chatbots, text and voice analytics, and other use cases. Use of AI by customer service teams is projected to increase by 143% over the next 18 months.

04 | Customer Engagement Goes Digital and Cross-Functional
In addition to being more closely aligned with departments across the organization, service is moving beyond the call center as customers embrace an array of digital channels. Sixty-six percent of service organizations are seeing increased digital case volume.

05 | Mobile Workers Become the Face of Brands
The expanding mobile workforce is driving new revenue streams and brand differentiation. Arming mobile workers with the same capabilities as their office-based colleagues is viewed as key to this evolution. Eighty-four percent of decision makers are prioritizing improved or expanded mobile service.
Technology’s impact on customer expectations is not a new concept. Twelve years after the release of the first iPhone, however, the pace of innovation shows no signs of slowing as the Fourth Industrial Revolution accelerates. The proliferation of artificial intelligence (AI) in everyday life – such as through personalized product recommendations and voice-activated personal assistants like Siri – ups the ante for companies across industries to meet and exceed ever-rising standards of engagement.

Today, end-to-end customer experience is the competitive differentiator, and customer service teams have unprecedented opportunity to elevate their role in the broader business.

80% of customers say the experience a company provides is as important as its products and services.*

80% of service decision makers say emerging technology is transforming customers’ expectations of their service organization.

82% of service decision makers say their company’s customer service must transform in order to stay competitive.

Transforming a department that has historically been viewed as a necessary cost center into a strategic asset is no easy task.

Looking ahead, executives increasingly understand that customer service transformation requires an investment of time, talent, and resources. Nearly seven in 10 decision makers say executives allocate the budget needed to modernize customer service operations. What’s more, the majority of service teams expect budget increases next year. High-performing teams are far ahead of underperformers when it comes to investment in service modernization.

<table>
<thead>
<tr>
<th>High Performers vs. Underperformers</th>
<th>2.0x more likely to have received budget increases last year.</th>
</tr>
</thead>
</table>

### Businesses Are Investing in Service Transformation

#### Service Decision Makers Who Agree with the Following Statements

<table>
<thead>
<tr>
<th>Statement</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can justify a business case for service investments</td>
<td>86%</td>
<td>79%</td>
<td>67%</td>
</tr>
<tr>
<td>Executives allocate the budget needed to modernize customer service operations</td>
<td>83%</td>
<td>70%</td>
<td>49%</td>
</tr>
<tr>
<td>We expect a budget increase next year</td>
<td>73%</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>We received a budget increase last year</td>
<td>69%</td>
<td>53%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Data represents service decision maker responses.
Customer service transformation is shaking up priorities. First and foremost, service decision makers seek to bring their most valuable resource – their employees – up to task by arming them with the skills they need. This is an ongoing, rather than one-and-done, initiative. This top objective is followed closely by improving the processes, workflows, and technologies employees rely on.

Several of these priorities – such as improved processes, technologies, and workforce skills – directly address some of the most pressing challenges facing today’s customer service organizations. And although the C-suite is largely addressing the perennial challenge of budgetary constraints, customer service teams must still contend with their top obstacle of keeping up with ever-changing customer expectations.

### Service Priorities Reflect a Changing Business Role

<table>
<thead>
<tr>
<th>TOP SERVICE PRIORITIES*</th>
<th>TOP SERVICE CHALLENGES**</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Improving workforce skills</td>
<td>1. Keeping up with changing customer expectations</td>
</tr>
<tr>
<td>2. Improving processes and workflows</td>
<td>2. Budgetary constraints</td>
</tr>
<tr>
<td>3. Improving service technologies</td>
<td>3. Ineffective or inefficient processes</td>
</tr>
<tr>
<td>4. Integrating service across the business</td>
<td>4. Insufficient tools and technologies</td>
</tr>
<tr>
<td>5. Pivoting from a cost center to a profit center</td>
<td>5. Underskilled agents</td>
</tr>
</tbody>
</table>

* Data represents service decision makers who report as a high priority in the next two years.
** Data represents service decision makers who report as a major challenge.
Agents Take a Step Up

More than seven in 10 agents say their jobs are more strategic than they were two years ago, and a similar number view their customer interactions as relationship-oriented, rather than transactional. When customers expect personalized, connected, and fast engagement, agents are charged with more than closing as many cases in as little time as possible.

This sentiment reflects an enlightened view of agents among customer service decision makers and the organizations they lead. Seventy-eight percent of service professionals say their company views agents as customer advocates, and 75% view them as brand ambassadors.

85% of service decision makers view investment in agents as a vital part of service transformation.

Service Agents Have Updated Job Descriptions

<table>
<thead>
<tr>
<th>Segment</th>
<th>High performers</th>
<th>Moderate performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Strategic</td>
<td>79%</td>
<td>75%</td>
<td>59%</td>
</tr>
<tr>
<td>Customer Interactions</td>
<td>81%</td>
<td>74%</td>
<td>63%</td>
</tr>
</tbody>
</table>

71% of service agents believe their role is more strategic than it was two years ago.

72% of service agents say their interactions with customers are relationship-oriented.
Agents welcome their increased responsibility and more strategic duties. In fact, **more than half (51%) of agents want more challenging work.** Yet opportunities to extend beyond traditional duties aren’t being spread evenly.

**63%** of agents at high-performing organizations spend most of their time solving complex issues, versus 43% at underperforming organizations.

Service decision makers realize that the transition from resetting passwords to, say, upselling a customer based on their unique needs is not a matter of flipping a switch. Nearly two-thirds (63%) of service decision makers cite improving workforce skills as a high priority, and over three-quarters (77%) are making significant investments in agent training.

These investments are paying off. At the same time agents take on more challenging work, 70% of them say they get the training they need to do their jobs well, and over half (55%) even have access to on-demand training that allows them to learn when and where it works for them.

### Investment in Agents Correlates with Service Performance

**Service Decision Makers Who Agree with the Following**

- **77%** of high performers are making significant investments in agent training compared to 57% of moderate performers and 44% of underperformers.
- **63%** of high performers cite improving workforce skills as a high priority over the next two years, compared to 59% of moderate performers and 44% of underperformers.

**Service Agents Who Say the Following**

- **70%** of high performers say they get the training they need to do their jobs as best as they can, compared to 52% of moderate performers and 41% of underperformers.
- **55%** of high performers have access to on-demand training, compared to 42% of moderate performers and 36% of underperformers.
Agents Take a Step Up

Even with all the training in the world, agents aren’t able to take on their elevated roles without the right resources; 69% of agents say they have the tools and technology they need to do their jobs. But there’s room to improve how these resources work together. Fifty-six percent of agents say they must toggle between multiple screens to find all the information they need to do their job.

Beyond training and technology, however, is a less tangible aspect of agents’ transformation: a sense of purpose. As it turns out, the prospects for continued career development and progression aren’t yet evident for some agents, with top organizations providing clearer or more robust opportunities for the future.

High Performers vs. Underperformers

2.0 $\times$ more likely for agents to have a clear path for career growth.

Top Teams Give Agents Intuitive Technology and Career Opportunities

<table>
<thead>
<tr>
<th>Service Agent Responses</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have all the tools and technology I need to do my job</td>
<td>85%</td>
<td>75%</td>
<td>49%</td>
</tr>
<tr>
<td>I have a clear path for career growth at my job</td>
<td>80%</td>
<td>63%</td>
<td>39%</td>
</tr>
<tr>
<td>I can find all the information I need to do my job on one screen</td>
<td>62%</td>
<td>45%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Data represents service agent responses.
AI’s Impact Takes Shape

To scale support and make space for more strategic work and customer relationships, teams may look to off-load manual tasks. Seventy percent of agents believe automating routine tasks would allow them to focus on higher-value work.

More than half (56%) of service organizations are investigating ways to use artificial intelligence (AI) – a set of technologies that perform tasks that normally require human interaction – as a potential solution. While adoption is nascent in customer service – only 24% of organizations use AI – its prevalence in the profession is projected to surge by 143% over the next 18 months.

Top teams stand apart from the competition with their early embrace of AI. In fact, high-performing service organizations are 2.9x more likely than underperformers to use AI, and are outpacing underperformers when it comes to defining the role it will play moving forward.

Customer Service Is Poised for an AI Revolution

Use or Planned Use of AI Among Service Organizations

- 24% currently use AI
- +143% projected growth rate of AI use over the next 18 months
- 34% plan to use AI within 18 months

Service Decision Makers Who Say the Following

- 56% Our organization is actively looking for ways to use AI
- 39% Our organization has a completely defined AI strategy

High Performers vs. Underperformers

- 3.2x more likely to have a completely defined AI strategy.

Unless otherwise noted, data represents service decision maker responses.
Although AI, as a term, has entered the public vernacular, its applications and implications can seem puzzling or futuristic. Within customer service circles, however, its common use cases are hardly things of science fiction.

Among customer service organizations with AI, over four-fifths (81%) use it to gather preliminary case information, for instance, when a customer makes first contact, rather than having an agent take the time to do this. Three-quarters of these teams use AI to empower customers to solve their own routine issues – such as setting up or activating a product – via self-service. A similar number (74%) use AI to classify cases and route them to the right agent. At their core, these top use cases are helping companies to scale support, solve issues faster, and free up agents to work on more valuable interactions with customers.

51% of agents without AI say they spend most of their time on mundane tasks, versus 34% of agents with AI.
Chatbots – AI technology that simulates voice or text-based conversations with humans – are perhaps the most visible, audible, and vocal example of AI in customer service.

Teams are still experimenting with AI chatbots, with 23% of service organizations using them today. **High-performing service organizations are 2.1x more likely than underperformers to use AI chatbots.**

Within 18 months, 53% of service organizations expect to use AI chatbots – a 136% growth rate that foreshadows a big role for the technology in the near future. Popular uses of AI chatbots, like gathering initial case information and enabling self-service in simple scenarios, fit with the goal of reducing manual workloads for agents.

**64%** of agents with AI chatbots are able to spend most of their time solving complex problems, versus 50% of agents **without** AI chatbots.

Already, 68% of service professionals at organizations using AI chatbots say their teams have seen reduced call and email volume.

Unless otherwise noted, data represents service decision maker responses.

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**AI Chatbots Are Set for an Expanded Role in Customer Service**

**Use or Planned Use of AI Chatbots Among Service Organizations**

**23%** currently use AI chatbots

**+136%** projected growth rate of AI chatbot use over the next 18 months

**31%** plan to use AI chatbots within 18 months

**Service Organizations with AI Chatbots That Use Them in the Following Ways**

<table>
<thead>
<tr>
<th>Use of AI Chatbots</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-service in simple scenarios</td>
<td>78%</td>
</tr>
<tr>
<td>Gathering initial information about a service case before handing off to an agent</td>
<td>77%</td>
</tr>
<tr>
<td>Providing agents with guidance and recommendations as they handle cases</td>
<td>71%</td>
</tr>
<tr>
<td>Greeting customers when they call</td>
<td>67%</td>
</tr>
</tbody>
</table>

* Data represents responses of service professionals at organizations that use AI chatbots.
If service organizations are turning to AI to help scale support and elevate the role of agents, their efforts appear to be working. **Eighty-four percent of customer service organizations using AI have seen improved prioritization of agents’ work** – the biggest impact cited. Similarly, no fewer than 74% of AI users report reduced agent email and calls, and three-quarters even credit AI with increased agent morale.

Customers are also reaping the benefits of AI. Over four-fifths of service teams with AI have increased their first contact resolution rates, and nearly as many have seen a boost to their CSAT and/or NPS scores.

Sixty-nine percent of teams with AI have even seen increased case deflection as a result of their adoption, a boon to agents and customers alike.

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**Service Teams with AI See Boons for Customers, Agents, and the Business**

**Service Professionals with AI Who Report the Following Benefits**

- **Improved prioritization of agents’ work**
  - Major benefit: 48%
  - Moderate benefit: 36%
  - Total: 84%

- **Increased first contact resolution**
  - Major benefit: 45%
  - Moderate benefit: 36%
  - Total: 82%

- **Reduced average handle time**
  - Major benefit: 42%
  - Moderate benefit: 37%
  - Total: 79%

- **Increased CSAT or NPS**
  - Major benefit: 46%
  - Moderate benefit: 33%
  - Total: 79%

- **Reduced agent call volume**
  - Major benefit: 38%
  - Moderate benefit: 39%
  - Total: 77%

- **Increased agent morale**
  - Major benefit: 41%
  - Moderate benefit: 35%
  - Total: 75%

- **Reduced agent email volume**
  - Major benefit: 37%
  - Moderate benefit: 37%
  - Total: 74%

- **Increased case deflection**
  - Major benefit: 33%
  - Moderate benefit: 36%
  - Total: 69%
As AI automates certain functions across roles and industries, some members of the workforce may wonder whether their positions are at risk. Customer service management, however, realizes that customers’ changing expectations include human connection and understanding. Seventy-eight percent of service decision makers say AI should never replace human interaction, and a similar percentage view the technology’s role as an augmentation – rather than substitute – for agents.

80% of service decision makers believe AI is most effective when deployed with – rather than in place of – humans.

Although more than seven in 10 agents view AI as helpful to their jobs, a small but significant portion are worried about its potential harm. Sixty-nine percent of agents want to learn more about AI’s impact on their job. It’s critical, then, for leadership to not only design AI strategies that empower their agents, but to be transparent about the role AI will – and won’t – play within their organizations.

Agents Welcome AI but Seek Insight About Its Impact

- 71% of service agents view AI as helpful to their job
- 69% of service agents want to learn more about AI’s impact on their job
- 27% of service agents are worried that AI will eliminate their job
04 Customer Engagement Goes Digital and Cross-Functional

The average customer now uses 10 different channels to communicate with companies. Customer service teams, who use an average of nine channels, are in a race to meet omni-channel expectations.

While tried-and-true channels like phone and email have near-universal adoption, customer service is on the cusp of a digital revolution. Sixty-six percent of service professionals say their organization is seeing increased case volume through digital channels.

Social media, SMS-based text, and messenger apps like WhatsApp and Facebook Messenger are already used by the majority of service teams. In the near future, channels with the biggest growth will include mobile chat and video support. Over the coming 18 months, the use of voice-activated personal assistants like Apple’s Siri or Amazon’s Alexa in customer service will see 152% growth.

With 69% of decision makers citing self-service as a major part of their service strategy, technologies like customer portals are also making a splash. While nearly two-thirds of service organizations use portals today, 84% are expected to within 18 months.

### Customer Service Channels Are on the Cusp of a Digital Revolution

#### Service Organizations That Use or Plan to Use the Following Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Currently Use</th>
<th>Plan to use within 18 months</th>
<th>Projected Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>95%</td>
<td>98%</td>
<td>+3%</td>
</tr>
<tr>
<td>Phone</td>
<td>95%</td>
<td>99%</td>
<td>+4%</td>
</tr>
<tr>
<td>In person</td>
<td>89%</td>
<td>97%</td>
<td>+8%</td>
</tr>
<tr>
<td>Social media</td>
<td>72%</td>
<td>85%</td>
<td>+18%</td>
</tr>
<tr>
<td>Online forms</td>
<td>68%</td>
<td>86%</td>
<td>+27%</td>
</tr>
<tr>
<td>Knowledge bases (e.g., FAQs)</td>
<td>66%</td>
<td>87%</td>
<td>+31%</td>
</tr>
<tr>
<td>Customer portal</td>
<td>64%</td>
<td>74%</td>
<td>+32%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>63%</td>
<td>76%</td>
<td>+20%</td>
</tr>
<tr>
<td>Messenger apps</td>
<td>55%</td>
<td>73%</td>
<td>+32%</td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>52%</td>
<td>75%</td>
<td>+44%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>51%</td>
<td>76%</td>
<td>+49%</td>
</tr>
<tr>
<td>Online communities/discussion forums</td>
<td>48%</td>
<td>72%</td>
<td>+50%</td>
</tr>
<tr>
<td>Mobile chat</td>
<td>43%</td>
<td>70%</td>
<td>+60%</td>
</tr>
<tr>
<td>Video support</td>
<td>32%</td>
<td>63%</td>
<td>+98%</td>
</tr>
<tr>
<td>Voice-activated personal assistants</td>
<td>20%</td>
<td>31%</td>
<td>+152%</td>
</tr>
</tbody>
</table>

Unless otherwise noted, data represents service decision-maker responses.

*“State of the Connected Customer,” Salesforce Research, June 2018
See page 52 for performance data.*
Customer Engagement Goes Digital and Cross-Functional

It’s not enough to merely be present on a given channel. Seventy percent of customers expect consistent experiences across channels, with the same capabilities and contextualized engagement based on earlier interactions, yet only 16% of customers say companies generally excel at this.*

To be sure, this is a tall order for customer service teams given how each individual customer has different channel preferences. Yet in contrast to customers’ observations, most service professionals believe they do a good job at engaging customers on their terms.

Decision makers have a decidedly rosier view of their organizations’ capabilities than do the agents on the front lines. For example, agents are 11 percentage points less likely than decision makers to believe their organization provides consistent customer experiences across all channels.

48% of agents say they can engage customers on any channel they choose.

Customer Engagement Goes Digital and Cross-Functional

Connected experiences – which 70% of customers say are very important to winning their business* – entail more than consistency across channels. Customers see one company, rather than disparate departments, and expect tailored engagement that accounts for their interactions with marketing messages, sales reps, and commerce systems. Eighty-nine percent of service professionals say partnering with other departments is critical to providing great customer experiences.

To make this level of collaboration possible, the majority of service organizations now share common goals and metrics with their cross-functional colleagues.

90% of service professionals say customer service is viewed as the responsibility of the entire company – not just their department.

Shared Goals and Data Across Departments Are Table Stakes

Service Professionals Who Share Common Goals and Metrics with the Following Teams

<table>
<thead>
<tr>
<th>Department</th>
<th>Percentage Sharing Goals and Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>81%</td>
</tr>
<tr>
<td>Commerce</td>
<td>79%</td>
</tr>
<tr>
<td>Marketing</td>
<td>75%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

The average digital transaction touches 35 different systems, and the average enterprise uses 1,000 different applications. While this data proliferation can empower agents to provide highly personalized service across the customer journey, disconnected sources can stand in the way.

84% of service professionals say a unified view of customer information is key to providing great customer experiences.

Much like their perceptions of omni-channel capabilities, agents and decision makers have different assessments of their access to data. For example, 59% of agents say they can easily solve issues using back-end systems, while 70% of decision makers believe they can.

Even if they have access to the right customer data, agents may not have a truly unified view of it.

**Fifty-six percent of agents have to toggle between multiple screens to find all the information they need to do their jobs.**

**Unified Customer Data Is a Work in Progress**

- 69% of service professionals say their organization does a great job of providing agents with a unified view of customer information.
- 65% of service professionals say their organization’s agents can easily solve issues with information from back-end systems.

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Mobile Workers Become the Face of Brands

Customers are 2.6x more likely to say service that comes to them is important versus unimportant.* It’s little surprise, then, that 84% of service decision makers cite improved or expanded mobile service offerings and operations as a priority.**

80% of service decision makers say mobile service drives significant revenue, and 79% say it provides new revenue streams.

The majority of service leadership with field operations are making significant investments in their mobile workers – such as through improved training or technology. More than half (54%) expect to increase their mobile worker headcount over the coming year. Top teams, however, have a head start on these investments. High-performing organizations are 2.3x more likely than underperformers to have hired more mobile workers last year.

Service Organizations Are Investing in Their Field Service Operations

Service Decision Makers Who Say the Following

- We are making significant investments in mobile workers (e.g., improved technology, hiring, etc.)
  - High performers: 49%
  - Moderate performers: 70%
  - Underperformers: 87%

- We expect to increase our mobile worker headcount next year
  - High performers: 40%
  - Moderate performers: 55%
  - Underperformers: 63%

- We increased our mobile worker headcount over the past year
  - High performers: 25%
  - Moderate performers: 44%
  - Underperformers: 59%

*Unless otherwise noted, data represents responses of service decision makers with mobile workers.
** Data represents responses of all service decision makers with or without mobile workers rating as a high or moderate priority in the next two years.
Nearly nine out of 10 service decision makers agree that the experience a customer has with a mobile worker is a reflection of their brand. Four-fifths of them claim to provide mobile workers with all the technology and resources they need.

Yet leaders’ perceptions of their mobile workforces’ technological capabilities may not match the reality. Nearly half (49%) of mobile workers – including 66% of underperformers – toggle through multiple screens to complete their tasks. Nearly half (45%) – including 57% of underperformers – have wasted significant time because of inaccurate or outdated job information.

89% of service decision makers say the experience a customer has with a mobile worker is a reflection of their brand.

Management Perceptions Don’t Match Reality When It Comes to the Mobile Workforce’s Capabilities

Data represents responses of service decision makers with mobile workers.

Mobile Workers Who Say the Following

- **I have to toggle between multiple screens to find all the information I need to do my job**: 35% of High performers, 45% of Moderate performers, 66% of Underperformers (49% overall)
- **I’ve wasted significant time because of inaccurate or outdated job information**: 39% of High performers, 40% of Moderate performers, 57% of Underperformers (45% overall)
Like an accountant without a calculator, a mobile worker without the right tools and information will not only frustrate themselves, but also their customers. As companies turn to mobile service for brand differentiation and new revenue streams, ensuring their mobile workforce has the same capabilities as their office-based colleagues is critical for the customer experience and employee experience, alike.

Top mobile workers are distancing themselves from the underperforming competition when it comes to the quality of service they can offer. In some cases, this amounts to capabilities that essentially extend the office to a mobile worker’s smartphone or tablet, such as offline access to critical information. In others, the impact on the end customer experience is more evident, like being able to understand the issue before stepping onsite or updating customers on delays.

### A Capabilities Gap Separates Mobile Workers at Top Organizations from the Competition

**Mobile Workers Who Say the Following**

<table>
<thead>
<tr>
<th>Capability</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can proactively understand customer issues before an appointment</td>
<td>85%</td>
<td>58%</td>
<td>83%</td>
</tr>
<tr>
<td>I can alert customers to appointment delays</td>
<td>75%</td>
<td>46%</td>
<td>69%</td>
</tr>
<tr>
<td>I can easily tell if a customer is under warranty for a part or service</td>
<td>57%</td>
<td>38%</td>
<td>63%</td>
</tr>
<tr>
<td>I have offline mobile access to knowledge bases</td>
<td>53%</td>
<td>39%</td>
<td>58%</td>
</tr>
<tr>
<td>I have access to connected device/IoT data</td>
<td>50%</td>
<td>41%</td>
<td>53%</td>
</tr>
<tr>
<td>I have offline mobile access to customer and case information</td>
<td>49%</td>
<td>37%</td>
<td>52%</td>
</tr>
</tbody>
</table>
Before service expanded beyond the call center, it was seen as a necessary evil by the boardroom, and metrics focused on keeping costs low. With their pivot to a source of revenue and driver of loyalty, customer service teams must now consider expanded definitions of success. While tried-and-true KPIs like case volume and average handle time aren’t going away, they are increasingly being tracked alongside new performance measures that account for the broader customer experience.

79% of service professionals say their metrics emphasize value over timeliness.

Over half (51%) of customer service teams, for example, track agent-driven revenue such as that from upselling. With increasingly sophisticated analytics, teams are also taking a more granular look at the customer experience, such as through first contact resolution (FCR) rates. And with an increased appreciation for their agents, three-quarters of service teams now formally measure the employee experience.

Service Metrics Get a Revamp for a New Era

Service Organizations That Track the Following Metrics

- Customer satisfaction (CSAT, NPS, etc.): 80%
- Employee experience: 75%
- Average handle time (AHT): 70%
- Average response time (ART): 69%
- Agent case volume: 64%
- Customer attrition: 57%
- SLA performance: 53%
- Cost per contact: 51%
- Agent-driven revenue: 51%
- First contact resolution (FCR) rate: 51%
- Customer effort score: 44%
- Case deflection: 36%
- Social promoter score (SPS): 33%
Country Profiles*

* Please keep in mind that cultural bias impacts survey results by country.
Country Profiles
Australia & New Zealand (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

**Top Service Priorities**

1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

**Top Service Challenges**

1. Budgetary constraints
2. Keeping up with changing customer expectations
3. Insufficient tools and technologies

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>AI’s Impact Takes Shape</th>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence†</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>AI chatbots †</td>
<td></td>
<td>130%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- Sales: 84%
- Commerce: 79%
- Marketing: 77%

Mobile Workers Become the Face of Brands

- 91% say the experience a customer has with a mobile worker is a reflection of their brand.
- 78% say they provide mobile workers with the technology and resources they need to do their jobs well.
- 38% have increased mobile worker headcount over the past year.
- 46% expect to increase mobile worker headcount next year.

Agents Take a Step Up

- 80% of service decision makers are making significant investments in agent training.
- 63% of service decision makers say improving workforce skills is a high priority.

- 59% of service agents say they have all the tools and technology they need to do their job.
- 28% of service agents say they can find all the information they need to do their job on one screen.
- 47% of service agents say they have a clear path for career growth at their job.

84% of service decision makers say emerging technology is transforming customers’ expectations of their service organization.

82% of service decision makers say their company’s customer service must transform in order to stay competitive.

67% of service professionals say their organization is seeing increased case volume through digital channels.

84% of service decision makers are making significant investments in agent training.

63% of service decision makers say improving workforce skills is a high priority.

- Data represents service decision makers who report as a “high priority” in the next two years.
- Data represents service decision makers who report as a “major challenge.”
- Data represents service decision maker responses.
- Data represents responses of service decision makers with mobile workers.
Country Profiles
Brazil (300 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*

1. Improving workforce skills AND Improving service technologies
2. Integrating service across the business AND Improving processes and workflows

Tie for first/second and third/fourth top service priorities.

Top Service Challenges**

1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Insufficient tools and technologies

AI’s Impact Takes Shape

Artificial intelligence†

Currently use 42%
Plan to use within 18 months 137%

AI chatbots †

Currently use 41%
Plan to use within 18 months 137%

Customer Engagement Goes Digital and Cross-Functional

81% of service professionals say their organization is seeing increased case volume through digital channels

Agents Take a Step Up

88% of service decision makers are making significant investments in agent training
78% of service decision makers say improving workforce skills is a high priority

Mobile Workers Become the Face of Brands

69% of service agents say they have all the tools and technology they need to do their job
57% of service agents say they can find all the information they need to do their job on one screen
81% of service agents say they have a clear path for career growth at their job

81% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
73% of service decision makers say their company’s customer service must transform in order to stay competitive

83% of service decision makers say improving workforce skills is a high priority
76% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
73% of service decision makers say their company’s customer service must transform in order to stay competitive

Sales
83%
Commerce
76%
Marketing
73%

92% say the experience a customer has with a mobile worker is a reflection of their brand
85% say they provide mobile workers with the technology and resources they need to do their jobs well
60% have increased mobile worker headcount over the past year
84% expect to increase mobile worker headcount next year

State of Service 27

69% of service agents say they have all the tools and technology they need to do their job
57% of service agents say they can find all the information they need to do their job on one screen
81% of service agents say they have a clear path for career growth at their job

Data represents service decision makers who report as a “high priority” in the next two years.

Data represents service decision makers who report as a “major challenge.”

† Data represents service decision maker responses
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
Canada (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

**Top Service Priorities**

1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

**Top Service Challenges**

1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Ineffective or inefficient processes

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Artificial intelligence†</th>
<th>153% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently use: 10%</td>
<td>Plan to use within 18 months: 23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AI chatbots†</th>
<th>175% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently use: 10%</td>
<td>Plan to use within 18 months: 18%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

### Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- **Sales**: 80%
- **Commerce**: 76%
- **Marketing**: 72%

Mobile Workers Become the Face of Brands

- 88% say the experience a customer has with a mobile worker is a reflection of their brand†.
- 78% say they provide mobile workers with the technology and resources they need to do their jobs well‡.
- 39% have increased mobile worker headcount over the past year§.
- 49% expect to increase mobile worker headcount next year‡.

---

* Data represents service decision makers who report as a “high priority” in the next two years.
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
§ Data represents service decision makers who report as a “major challenge.”

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### Key Points

- 64% of service agents say they have all the tools and technology they need to do their job.
- 39% of service agents say they can find all the information they need to do their job on one screen.
- 53% of service agents say they have a clear path for career growth at their job.
- 52% of service professionals say their organization is seeing increased case volume through digital channels.
Country Profiles
France (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving workforce skills
2. Improving processes and workflows
3. Creating a shared, single view of the customer across business units

Top Service Challenges**
1. Budgetary constraints
2. Keeping up with changing customer expectations
3. Disconnected data sources

Agents Take a Step Up
1. 68% of service decision makers say they have all the tools and technology they need to do their job
2. 64% of service agents say they can find all the information they need to do their job on one screen
3. 57% of service agents say they have a clear path for career growth at their job

AI’s Impact Takes Shape

Artificial intelligence†
Currently use: 14%
Plan to use within 18 months: 33%
Projected growth rate: 229%

AI chatbots†
Currently use: 17%
Plan to use within 18 months: 31%
Projected growth rate: 180%

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales: 80%
Commerce: 80%
Marketing: 72%

Mobile Workers Become the Face of Brands

91% say the experience a customer has with a mobile worker is a reflection of their brand
76% say they provide mobile workers with the technology and resources they need to do their jobs well
39% have increased mobile worker headcount over the past year
38% expect to increase mobile worker headcount next year

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents responses of service decision makers with mobile workers.
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
Germany (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving workforce skills AND improving processes and workflows
2. Improving service technologies

Top Service Challenges**
1. Underskilled agents
2. Agent attrition
3. Budgetary constraints

Agents Take a Step Up
76% of service decision makers are making significant investments in agent training
71% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Artificial intelligence†</td>
</tr>
<tr>
<td>13%</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td>AI chatbots‡</td>
</tr>
<tr>
<td>16%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

50% of service professionals say their organization is seeing increased case volume through digital channels

Mobile Workers Become the Face of Brands

85% say the experience a customer has with a mobile worker is a reflection of their brand
73% say they provide mobile workers with the technology and resources they need to do their jobs well
26% have increased mobile worker headcount over the past year
33% expect to increase mobile worker headcount next year

---

* Data represents service decision makers who report as a "high priority" in the next two years.
** Data represents service decision makers who report as a "major challenge."
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
India (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving service technologies
2. Improving workforce skills
3. Improving processes and workflows

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Ineffective or inefficient processes
3. Budgetary constraints

Agents Take a Step Up
85% of service decision makers are making significant investments in agent training
76% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

Artificial intelligence†
Currently use: 40%
Plan to use within 18 months: 42%
Projected growth rate: 90%

AI chatbots‡
Currently use: 40%
Plan to use within 18 months: 47%
Projected growth rate: 118%

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales: 82%
Commerce: 81%
Marketing: 81%

Mobile Workers Become the Face of Brands

96% of service agents say they have all the tools and technology they need to do their job
77% of service agents say they can find all the information they need to do their job on one screen
94% of service agents say they have a clear path for career growth at their job

96% of service professionals say their organization is seeing increased case volume through digital channels
88% of service professionals say their organization is transforming customers’ expectations of their service organization
93% of service decision makers say their company’s customer service must transform in order to stay competitive

85% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
94% of service decision makers say their company’s customer service must transform in order to stay competitive

89% say the experience a customer has with a mobile worker is a reflection of their brand
96% say they provide mobile workers with the technology and resources they need to do their jobs well
69% have increased mobile worker headcount over the past year
78% expect to increase mobile worker headcount next year

91% of service decision makers say improving workforce skills is a high priority
94% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
93% of service decision makers say their company’s customer service must transform in order to stay competitive

1. Data represents service decision makers who report as a “high priority” in the next two years.
2. Data represents service decision makers who report as a “major challenge.”
3. Data represents service decision maker responses.
4. Data represents responses of service decision makers with mobile workers.
Country Profiles
Japan (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

**Top Service Priorities**

1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

**Top Service Challenges**

1. Underskilled agents
2. Ineffective or inefficient processes
3. Lack of executive engagement

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th></th>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>AI chatbots</td>
<td>38%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- Sales: 72%
- Commerce: 69%
- Marketing: 69%

Mobile Workers Become the Face of Brands

- 74% say the experience a customer has with a mobile worker is a reflection of their brand.
- 67% say they provide mobile workers with the technology and resources they need to do their jobs well.
- 33% have increased mobile worker headcount over the past year.
- 40% expect to increase mobile worker headcount next year.

Agent Take a Step Up

- 53% of service decision makers are making significant investments in agent training.
- 51% of service decision makers say improving workforce skills is a high priority.

Underskilled agents

- 79% of service decision makers say emerging technology is transforming customers’ expectations of their service organization.
- 86% of service decision makers say their company’s customer service must transform in order to stay competitive.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving processes and workflows</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Improving workforce skills</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Improving service technologies</td>
<td>41%</td>
<td></td>
</tr>
</tbody>
</table>

Salesforce Research

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
Mexico (300 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving service technologies
2. Improving processes and workflows
3. Improving workforce skills

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Ineffective or inefficient processes
3. Insufficient tools and technologies

Agents Take a Step Up
90% of service decision makers are making significant investments in agent training
70% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Service</th>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence</td>
<td>17%</td>
<td>50%</td>
</tr>
<tr>
<td>AI chatbots</td>
<td>21%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage of Service Professionals Who Share Common Goals and Metrics with the Following</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>91%</td>
</tr>
<tr>
<td>Commerce</td>
<td>88%</td>
</tr>
<tr>
<td>Marketing</td>
<td>80%</td>
</tr>
</tbody>
</table>

Mobile Workers Become the Face of Brands

<table>
<thead>
<tr>
<th>Percentage of Service Professionals</th>
<th>Data represents service decision maker responses.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have increased mobile worker headcount over the past year</td>
<td>53%</td>
</tr>
<tr>
<td>Expect to increase mobile worker headcount next year</td>
<td>66%</td>
</tr>
<tr>
<td>Say the experience a customer has with a mobile worker is a reflection of their brand</td>
<td>94%</td>
</tr>
<tr>
<td>Say they provide mobile workers with the technology and resources they need to do their jobs well</td>
<td>90%</td>
</tr>
</tbody>
</table>

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
Nordics: Denmark, Finland, Norway, and Sweden (150 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving workforce skills
2. Improving processes and workflows
3. Improving service technologies

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Ineffective or inefficient processes
3. Budgetary constraints

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Artificial intelligence</th>
<th>80% projected growth rate</th>
<th>AI chatbots</th>
<th>69% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>29%</td>
<td>30%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- Sales: 86%
- Commerce: 85%
- Marketing: 80%

Mobile Workers Become the Face of Brands

- Say the experience a customer has with a mobile worker is a reflection of their brand: 94%
- Say they provide mobile workers with the technology and resources they need to do their jobs well: 84%
- Have increased mobile worker headcount over the past year: 53%
- Expect to increase mobile worker headcount next year: 66%

Agents Take a Step Up

- 80% of service decision makers are making significant investments in agent training
- 59% of service decision makers say improving workforce skills is a high priority

- 78% of service agents say they have all the tools and technology they need to do their job
- 52% of service agents say they can find all the information they need to do their job on one screen
- 61% of service agents say they have a clear path for career growth at their job

- 78% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
- 81% of service decision makers say their company’s customer service must transform in order to stay competitive

- 80% of service professionals say their organization is seeing increased case volume through digital channels
Country Profiles
Singapore (150 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving service technologies
2. Improving processes and workflows
3. Improving workforce skills

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Ineffective or inefficient processes

Agents Take a Step Up
77% of service decision makers are making significant investments in agent training
52% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Technology</th>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence†</td>
<td>19%</td>
<td>49%</td>
</tr>
<tr>
<td>AI chatbots†</td>
<td>29%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales: 76%
Commerce: 76%
Marketing: 74%

Mobile Workers Become the Face of Brands

87% say the experience a customer has with a mobile worker is a reflection of their brand†
80% say they provide mobile workers with the technology and resources they need to do their jobs well‡
42% have increased mobile worker headcount over the past year‡
54% expect to increase mobile worker headcount next year‡

---

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Country Profiles
United Kingdom & Ireland (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

Top Service Challenges**
1. Budgetary constraints
2. Keeping up with changing customer expectations
3. Ineffective or inefficient processes

Agents Take a Step Up
80% of service decision makers are making significant investments in agent training
58% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

Artificial intelligence†
- Currently use: 15%
- Plan to use within 18 months: 27%

AI chatbots‡
- Currently use: 14%
- Plan to use within 18 months: 23%

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales: 78%
Commerce: 77%
Marketing: 75%

Mobile Workers Become the Face of Brands

70% of service agents say they have all the tools and technology they need to do their job
37% of service agents say they can find all the information they need to do their job on one screen
49% of service agents say they have a clear path for career growth at their job

65% of service professionals say their organization is seeing increased case volume through digital channels

72% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
81% of service decision makers say their company’s customer service must transform in order to stay competitive

86% say the experience a customer has with a mobile worker is a reflection of their brand
73% say they provide mobile workers with the technology and resources they need to do their jobs well
41% expect to increase mobile worker headcount next year
28% have increased mobile worker headcount over the past year

7% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
8% of service decision makers say their company’s customer service must transform in order to stay competitive

177% projected growth rate
165% projected growth rate

1. Data represents service decision makers who report as a “high priority” in the next two years.
2. Data represents service decision makers who report as a “major challenge.”
3. Data represents service decision maker responses.
4. Data represents responses of service decision makers with mobile workers.
Country Profiles
United States (700 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

**Top Service Priorities**

1. Improving processes and workflows
2. Improving workforce skills
3. Integrating service across the business

**Top Service Challenges**

1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Ineffective or inefficient processes

AI’s Impact Takes Shape

- **Artificial intelligence**
  - Currently use: 14%
  - Plan to use within 18 months: 23%
  - Projected growth rate: 174%

- **AI chatbots**
  - Currently use: 7%
  - Plan to use within 18 months: 19%
  - Projected growth rate: 252%

Customer Engagement Goes Digital and Cross-Functional

- **Percentage of Service Professionals Who Share Common Goals and Metrics with the Following**
  - Sales: 80%
  - Commerce: 80%
  - Marketing: 75%

Agents Take a Step Up

- 68% of service decision makers are making significant investments in agent training
- 61% of service decision makers say improving workforce skills is a high priority
- 59% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
- 71% of service decision makers say their company’s customer service must transform in order to stay competitive

Mobile Workers Become the Face of Brands

- 69% of service agents say they have all the tools and technology they need to do their job
- 29% of service agents say they can find all the information they need to do their job on one screen
- 49% of service agents say they have a clear path for career growth at their job
- 36% have increased mobile worker headcount over the past year
- 39% expect to increase mobile worker headcount next year
- 88% say the experience a customer has with a mobile worker is a reflection of their brand
- 74% say they provide mobile workers with the technology and resources they need to do their jobs well

*Data represents service decision makers who report as a “high priority” in the next two years.*

**Data represents service decision makers who report as a “major challenge.”**

† *Data represents service decision maker responses.*

‡ *Data represents responses of service decision makers with mobile workers.*
Industry Profiles*

* Not all industries that were surveyed are profiled in this section.
Industry Profiles
Consumer Goods (187 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1 Improving processes and workflows
2 Improving service technologies
3 Improving workforce skills

Top Service Challenges**
1 Keeping up with changing customer expectations
2 Budgetary constraints
3 Insufficient tools and technologies AND Disconnected data

Agents Take a Step Up

83% of service agents say they have all the tools and technology they need to do their job
59% of service agents say they can find all the information they need to do their job on one screen
72% of service agents say they have a clear path for career growth at their job

AI’s Impact Takes Shape

Artificial intelligence†
Currently use 22%
Plan to use within 18 months 40%
Projected growth rate 183%

AI chatbots†
Currently use 22%
Plan to use within 18 months 41%
Projected growth rate 187%

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following
- Sales 81%
- Commerce 81%
- Marketing 71%

Mobile Workers Become the Face of Brands

95% say the experience a customer has with a mobile worker is a reflection of their brand
88% say they provide mobile workers with the technology and resources they need to do their jobs well
81% have increased mobile worker headcount over the past year
55% expect to increase mobile worker headcount next year

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Industry Profiles
Financial Services (358 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*

1 Improving service technologies
2 Improving processes and workflows
3 Improving workforce skills

Top Service Challenges**

1 Keeping up with changing customer expectations
2 Budgetary constraints
3 Ineffective or inefficient processes

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Current use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence†</td>
<td>41%</td>
</tr>
<tr>
<td>AI chatbots†</td>
<td>32%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- Sales: 81%
- Commerce: 77%
- Marketing: 74%

Agents Take a Step Up

- 79% of service decision makers are making significant investments in agent training
- 61% of service decision makers say improving workforce skills is a high priority
- 67% of service agents say they have all the tools and technology they need to do their job
- 32% of service agents say they can find all the information they need to do their job on one screen
- 55% of service agents say they have a clear path for career growth at their job

Mobile Workers Become the Face of Brands

- 89% say the experience a customer has with a mobile worker is a reflection of their brand
- 84% say they provide mobile workers with the technology and resources they need to do their jobs well
- 49% have increased mobile worker headcount over the past year
- 58% expect to increase mobile worker headcount next year

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Industry Profiles
Government (231 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

Top Service Challenges**
1. Budgetary constraints
2. Ineffective or inefficient processes
3. Keeping up with changing customer expectations

Artificial intelligence†
- Currently use: 13%
- Plan to use within 18 months: 29%

AI chatbots‡
- Currently use: 9%
- Plan to use within 18 months: 18%

AI’s Impact Takes Shape

Customer Engagement Goes Digital and Cross-Functional

Agents Take a Step Up
- 74% of service decision makers are making significant investments in agent training
- 67% of service decision makers say improving workforce skills is a high priority

Mobile Workers Become the Face of Brands
- 58% of service agents say they have all the tools and technology they need to do their job
- 38% of service agents say they can find all the information they need to do their job on one screen
- 54% of service agents say they have a clear path for career growth at their job
- 90% say the experience a customer has with a mobile worker is a reflection of their brand
- 71% say they provide mobile workers with the technology and resources they need to do their jobs well
- 30% have increased mobile worker headcount over the past year
- 31% expect to increase mobile worker headcount next year

Datasources:
- † Data represents service decision maker responses.
- ‡ Data represents responses of service decision makers with mobile workers.
Industry Profiles
Healthcare and Life Sciences (375 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*

1. Improving processes and workflows
2. Improving workforce skills
3. Integrating service across the business

Top Service Challenges**

1. Keeping up with changing customer expectations AND Budgetary constraints
2. Ineffective or inefficient processes
3. Improving workforce skills

Agents Take a Step Up

70% of service decision makers are making significant investments in agent training
65% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

Artificial intelligence†

Currently use Plan to use within 18 months

163% projected growth rate

AI chatbots†

167% projected growth rate

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales
81%

Commerce
78%

Marketing
77%

Mobile Workers Become the Face of Brands

say the experience a customer has with a mobile worker is a reflection of their brand
89%
say they provide mobile workers with the technology and resources they need to do their jobs well
72%
45% have increased mobile worker headcount over the past year
50% expect to increase mobile worker headcount next year

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Industry Profiles
Manufacturing (275 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving processes and workflows
2. Improving workforce skills
3. Integrating service across the business

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Ineffective or inefficient processes
3. Budgetary constraints

Agents Take a Step Up
78% of service decision makers say emerging technology is transforming customers' expectations of their service organization
78% of service decision makers say their company's customer service must transform in order to stay competitive

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>AI’s Impact Takes Shape</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Currently use</td>
</tr>
<tr>
<td>Plan to use within 18 months</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Artificial intelligence†</th>
<th>173% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>38%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AI chatbots‡</th>
<th>137% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>24%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

<table>
<thead>
<tr>
<th>Customer Engagement Goes Digital and Cross-Functional</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Percentage of Service Professionals Who Share Common Goals and Metrics with the Following</td>
</tr>
<tr>
<td>Sales</td>
</tr>
<tr>
<td>Commerce</td>
</tr>
<tr>
<td>Marketing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mobile Workers Become the Face of Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>say the experience a customer has with a mobile worker is a reflection of their brand°</td>
</tr>
<tr>
<td>say they provide mobile workers with the technology and resources they need to do their jobs well°</td>
</tr>
<tr>
<td>have increased mobile worker headcount over the past year⁴</td>
</tr>
<tr>
<td>expect to increase mobile worker headcount next year⁴</td>
</tr>
</tbody>
</table>

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
</tr>
<tr>
<td>81%</td>
</tr>
<tr>
<td>79%</td>
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</table>

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>90%</td>
</tr>
<tr>
<td>83%</td>
</tr>
<tr>
<td>40%</td>
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<tr>
<td>58%</td>
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<p>| |</p>
<table>
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<tr>
<th></th>
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<tbody>
<tr>
<td>85%</td>
</tr>
<tr>
<td>54%</td>
</tr>
<tr>
<td>59%</td>
</tr>
</tbody>
</table>

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Data represents service decision makers who report as a “high priority” in the next two years.</td>
</tr>
<tr>
<td>Data represents service decision makers who report as a “major challenge.”</td>
</tr>
<tr>
<td>Data represents service decision maker responses.</td>
</tr>
<tr>
<td>Data represents responses of service decision makers with mobile workers.</td>
</tr>
</tbody>
</table>
Industry Profiles
Media and Communications (178 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*

1. Improving service technologies
2. Improving processes and workflows
3. Improving workforce skills

Top Service Challenges**

1. Budgetary constraints
2. Keeping up with changing customer expectations
3. Insufficient tools and technologies AND Ineffective or inefficient processes

Agents Take a Step Up

81% of service decision makers are making significant investments in agent training
61% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Artificial intelligence†</th>
<th>142% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently use</td>
<td>Plan to use within 18 months</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AI chatbots†</th>
<th>63% projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently use</td>
<td>Plan to use within 18 months</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- 82% of service professionals say their organization is seeing increased case volume through digital channels
- 80% of service professionals say emerging technology is transforming customers’ expectations of their service organization
- 74% of service professionals say their company’s customer service must transform in order to stay competitive

Mobile Workers Become the Face of Brands

92% say the experience a customer has with a mobile worker is a reflection of their brand
87% say they provide mobile workers with the technology and resources they need to do their jobs well
34% have increased mobile worker headcount over the past year
50% expect to increase mobile worker headcount next year

- Data represents service decision makers who report as a “high priority” in the next two years.
- Data represents service decision makers who report as a “major challenge.”
- Data represents service decision maker responses.
- Data represents responses of service decision makers with mobile workers.

Salesforce Research
Industry Profiles
Retail (375 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

1. Improving processes and workflows
2. Improving workforce skills
3. Improving service technologies

Top Service Priorities*

1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Underskilled agents

Top Service Challenges**

AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th></th>
<th>Currently use</th>
<th>Plan to use within 18 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence†</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>AI chatbots †</td>
<td>28%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Customer Engagement Goes Digital and Cross-Functional

| Percentage of Service Professionals Who Share Common Goals and Metrics with the Following |
|---------------------------------|-------------|
| Sales                           | 84%         |
| Commerce                        | 81%         |
| Marketing                       | 80%         |

Mobile Workers Become the Face of Brands

| Say the experience a customer has with a mobile worker is a reflection of their brand* | 90% |
| Say they provide mobile workers with the technology and resources they need to do their jobs well† | 74% |
| Have increased mobile worker headcount over the past 4 years‡ | 41% |
| Expect to increase mobile worker headcount next year‡ | 50% |

Agents Take a Step Up

| Of service decision makers are making significant investments in agent training | 78% |
| Of service decision makers saying improving workforce skills is a high priority | 60% |

| Of service decision makers saying emerging technology is transforming customers’ expectations of their service organization | 80% |
| Of service decision makers saying their company’s customer service must transform in order to stay competitive | 81% |

| Of service agents saying they have all the tools and technology they need to do their job | 63% |
| Of service agents saying they can find all the information they need to do their job on one screen | 48% |
| Of service agents saying they have a clear path for career growth at their job | 59% |

*Data represents service decision makers who report as a “high priority” in the next two years.
**Data represents service decision makers who report as a “major challenge.”
†Data represents service decision maker responses.
‡Data represents responses of service decision makers with mobile workers.
## Industry Profiles
### Technology (343 customer service professionals)

### The Fourth Industrial Revolution Drives Service Transformation

#### Top Service Priorities
1. Improving service technologies
2. Improving workforce skills
3. Improving processes and workflows

#### Top Service Challenges
1. Keeping up with changing customer expectations
2. Insufficient tools and technologies
3. Underskilled agents

### AI’s Impact Takes Shape

<table>
<thead>
<tr>
<th>Artificial intelligence</th>
<th>Plan to use within 18 months</th>
<th>Projected growth rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>42%</td>
<td>59%</td>
</tr>
</tbody>
</table>

### Customer Engagement Goes Digital and Cross-Functional

#### Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

- Sales: 76%
- Commerce: 78%
- Marketing: 71%

### Mobile Workers Become the Face of Brands

- 88% of service decision makers say the experience a customer has with a mobile worker is a reflection of their brand.
- 86% of service decision makers say they provide mobile workers with the technology and resources they need to do their jobs well.
- 57% of service decision makers have increased mobile worker headcount over the past year.
- 72% of service decision makers expect to increase mobile worker headcount next year.

---

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Industry Profiles
Travel, Transportation, and Hospitality (284 customer service professionals)

The Fourth Industrial Revolution Drives Service Transformation

Top Service Priorities*
1. Improving workforce skills
2. Improving service technologies AND improving processes and workflows

Top Service Challenges**
1. Keeping up with changing customer expectations
2. Budgetary constraints
3. Underskilled agents

Agents Take a Step Up
1. 71% of service decision makers are making significant investments in agent training
2. 73% of service decision makers say improving workforce skills is a high priority

AI’s Impact Takes Shape

Artificial intelligence†
- Currently use: 16%
- Plan to use within 18 months: 31%
- Projected growth rate: 187%

AI chatbots†
- Currently use: 12%
- Plan to use within 18 months: 29%
- Projected growth rate: 241%

Customer Engagement Goes Digital and Cross-Functional

Percentage of Service Professionals Who Share Common Goals and Metrics with the Following

Sales: 83%
Marketing: 74%
Commerce: 80%

Mobile Workers Become the Face of Brands

67% of service agents say they have all the tools and technology they need to do their job
44% of service agents say they can find all the information they need to do their job on one screen
61% of service agents say they have a clear path for career growth at their job

86% say the experience a customer has with a mobile worker is a reflection of their brand‡
78% say they provide mobile workers with the technology and resources they need to do their jobs well‡
39% have increased mobile worker headcount over the past year‡
56% expect to increase mobile worker headcount next year‡

73% of service decision makers say emerging technology is transforming customers’ expectations of their service organization
83% of service decision makers say their company’s customer service must transform in order to stay competitive

66% of service professionals say their organization is seeing increased case volume through digital channels

* Data represents service decision makers who report as a “high priority” in the next two years.
** Data represents service decision makers who report as a “major challenge.”
† Data represents service decision maker responses.
‡ Data represents responses of service decision makers with mobile workers.
Appendix
### Industry and Country: Disparity Data Gaps

#### Share of High Performers and Underperformers

<table>
<thead>
<tr>
<th>Industry/Market</th>
<th>High Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td>Lowest</td>
</tr>
<tr>
<td>Government</td>
<td>15%</td>
<td>Consumer goods</td>
</tr>
<tr>
<td>Travel, transportation, and hospitality</td>
<td>34%</td>
<td>Government</td>
</tr>
<tr>
<td>18%</td>
<td>52%</td>
<td>7%</td>
</tr>
</tbody>
</table>

#### Adoption of Tools and Technologies*

<table>
<thead>
<tr>
<th>Industry/Market</th>
<th>Lowest</th>
<th>Highest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial intelligence (AI)</td>
<td>13% Education</td>
<td>41% Financial services</td>
</tr>
<tr>
<td>AI chatbots</td>
<td>9% Government</td>
<td>42% Media and communications</td>
</tr>
<tr>
<td>Voice-activated personal assistants</td>
<td>13% Government</td>
<td>30% Financial services</td>
</tr>
</tbody>
</table>

#### Organizations Actively Looking for Ways to Use AI*

<table>
<thead>
<tr>
<th>Industry/Market</th>
<th>Lowest</th>
<th>Highest</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY INDUSTRY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>37%</td>
<td>77%</td>
</tr>
<tr>
<td>Financial services</td>
<td>13%</td>
<td>46%</td>
</tr>
<tr>
<td>BY COUNTRY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td>7%</td>
<td>40%</td>
</tr>
<tr>
<td>India</td>
<td>9%</td>
<td>37%</td>
</tr>
<tr>
<td>BY COUNTRY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td>29%</td>
<td>88%</td>
</tr>
</tbody>
</table>

---

Please keep in mind that cultural bias impacts survey results by country.

* Data represents service decision maker responses.
## Appendix
### Industry and Country: Disparity Data Gaps

<table>
<thead>
<tr>
<th>Organizations Seeing More Cases Through Digital Channels</th>
<th>Average Number of Channels Used*</th>
<th>Agents Who Can Find All Information They Need to Do Their Job on One Screen**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BY INDUSTRY</strong></td>
<td><strong>BY INDUSTRY</strong></td>
<td><strong>BY INDUSTRY</strong></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td>Lowest</td>
</tr>
<tr>
<td>59% Healthcare and life sciences</td>
<td>73% Technology</td>
<td>8 Engineering, architecture, construction, real estate</td>
</tr>
<tr>
<td><strong>BY COUNTRY</strong></td>
<td></td>
<td><strong>BY COUNTRY</strong></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td>Lowest</td>
</tr>
<tr>
<td>48% Japan</td>
<td>88% India</td>
<td>8 Canada</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organizations with an Internal Mobile Workforce</th>
<th>Organizations with Self-Service as a Major Part of Service Strategy*</th>
<th>Agents with Easy Access to All the Information Needed to Do Their Job**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BY INDUSTRY</strong></td>
<td><strong>BY INDUSTRY</strong></td>
<td><strong>BY INDUSTRY</strong></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td>Lowest</td>
</tr>
<tr>
<td>64% Media and communications</td>
<td>82% Engineering, architecture, construction, real estate</td>
<td>59% Healthcare and life sciences</td>
</tr>
<tr>
<td><strong>BY COUNTRY</strong></td>
<td></td>
<td><strong>BY COUNTRY</strong></td>
</tr>
<tr>
<td>Lowest</td>
<td>Highest</td>
<td>Lowest</td>
</tr>
<tr>
<td>60% India</td>
<td>80% France</td>
<td>57% Canada</td>
</tr>
</tbody>
</table>

Please keep in mind that cultural bias impacts survey results by country.

* Data represents service decision maker responses.

** Data represents service agent responses.
## Appendix

### Distribution of Performance Levels by Firmographics

<table>
<thead>
<tr>
<th>Industry</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>33%</td>
<td>41%</td>
<td>26%</td>
</tr>
<tr>
<td>Healthcare and life sciences</td>
<td>22%</td>
<td>48%</td>
<td>29%</td>
</tr>
<tr>
<td>Financial services</td>
<td>30%</td>
<td>45%</td>
<td>25%</td>
</tr>
<tr>
<td>Technology</td>
<td>32%</td>
<td>48%</td>
<td>20%</td>
</tr>
<tr>
<td>Travel, transportation, and hospitality</td>
<td>34%</td>
<td>45%</td>
<td>21%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>28%</td>
<td>47%</td>
<td>25%</td>
</tr>
<tr>
<td>Government</td>
<td>15%</td>
<td>37%</td>
<td>48%</td>
</tr>
<tr>
<td>Engineering, architecture, construction, real estate</td>
<td>26%</td>
<td>46%</td>
<td>28%</td>
</tr>
<tr>
<td>Education</td>
<td>24%</td>
<td>45%</td>
<td>32%</td>
</tr>
<tr>
<td>Consumer goods</td>
<td>32%</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>Media and communications</td>
<td>27%</td>
<td>43%</td>
<td>30%</td>
</tr>
<tr>
<td>Other</td>
<td>25%</td>
<td>49%</td>
<td>26%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Model</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business-to-business (B2B)</td>
<td>20%</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Business-to-consumer (B2C)</td>
<td>29%</td>
<td>45%</td>
<td>26%</td>
</tr>
<tr>
<td>Business-to-business-to-consumer (B2B2C)</td>
<td>29%</td>
<td>46%</td>
<td>25%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company Size</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (21–100 employees)</td>
<td>32%</td>
<td>46%</td>
<td>23%</td>
</tr>
<tr>
<td>Medium (101–3,500 employees)</td>
<td>27%</td>
<td>47%</td>
<td>26%</td>
</tr>
<tr>
<td>Enterprise (3,501+ employees)</td>
<td>25%</td>
<td>44%</td>
<td>31%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>High Performers</th>
<th>Moderate Performers</th>
<th>Underperformers</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>27%</td>
<td>44%</td>
<td>29%</td>
</tr>
<tr>
<td>Europe</td>
<td>22%</td>
<td>49%</td>
<td>29%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>32%</td>
<td>43%</td>
<td>25%</td>
</tr>
<tr>
<td>Latin America</td>
<td>30%</td>
<td>47%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Please keep in mind that cultural bias impacts survey results by country.
## Appendix

### Adoption of Channels by Service Teams Compared to Customers

#### Service Organization Versus Customer Use of the Following Channels

<table>
<thead>
<tr>
<th>Channel Use</th>
<th>Customer Rank</th>
<th>Use by service teams</th>
<th>Use by customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>#1</td>
<td>95%</td>
<td>98%</td>
</tr>
<tr>
<td>Phone</td>
<td>#2</td>
<td>95%</td>
<td>93%</td>
</tr>
<tr>
<td>In person</td>
<td>#11</td>
<td>94%</td>
<td>89%</td>
</tr>
<tr>
<td>Social media</td>
<td>#7</td>
<td>72%</td>
<td>71%</td>
</tr>
<tr>
<td>Online forms</td>
<td>#5</td>
<td>68%</td>
<td>83%</td>
</tr>
<tr>
<td>Knowledge bases</td>
<td>#4</td>
<td>66%</td>
<td>82%</td>
</tr>
<tr>
<td>Customer portal</td>
<td>#9</td>
<td>64%</td>
<td>84%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>#9</td>
<td>63%</td>
<td>78%</td>
</tr>
<tr>
<td>Messenger apps</td>
<td>#10</td>
<td>55%</td>
<td>72%</td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>#12</td>
<td>52%</td>
<td>81%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>#6</td>
<td>48%</td>
<td>82%</td>
</tr>
<tr>
<td>Online communities/discussion forums</td>
<td>#13</td>
<td>43%</td>
<td>61%</td>
</tr>
<tr>
<td>Mobile chat</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Video support</td>
<td>NA</td>
<td>33%</td>
<td>NA</td>
</tr>
<tr>
<td>Voice-activated personal assistants</td>
<td>#13</td>
<td>20%</td>
<td>54%</td>
</tr>
</tbody>
</table>

* Data represents service decision maker responses.
### Service Professionals Who Say the Following About Their Organization

- **73%**
  - We clearly understand which channels our customers prefer
  - 91% High performers
  - 77% Moderate performers
  - 49% Underperformers

- **73%**
  - We actively engage on the channels our customers prefer
  - 89% High performers
  - 78% Moderate performers
  - 47% Underperformers

- **70%**
  - We can deliver consistent customer experiences on all channels
  - 90% High performers
  - 74% Moderate performers
  - 43% Underperformers

- **69%**
  - We do a great job of providing agents with a unified view of customer information
  - 89% High performers
  - 72% Moderate performers
  - 42% Underperformers

- **65%**
  - Agents can easily solve issues with information from back-end systems
  - 83% High performers
  - 68% Moderate performers
  - 41% Underperformers

### Service Professionals Who Do the Following

- **SHARE COMMON GOALS AND METRICS WITH SALES TEAMS**
  - 81% of service professionals
  - 87% of high performers
  - 84% of moderate performers
  - 69% of underperformers

- **SHARE COMMON GOALS AND METRICS WITH COMMERCE TEAMS**
  - 79% of service professionals
  - 86% of high performers
  - 81% of moderate performers
  - 67% of underperformers

- **SHARE COMMON GOALS AND METRICS WITH MARKETING TEAMS**
  - 75% of service professionals
  - 84% of high performers
  - 78% of moderate performers
  - 61% of underperformers
Survey Demographics
## Survey Demographics

### Industry

- Retail ........................................ 11%
- Healthcare and life sciences .......... 11%
- Financial services ........................ 10%
- Technology .................................. 10%
- Travel, transportation, and hospitality .. 8%
- Manufacturing ............................ 8%
- Government ................................ 7%
- Engineering, architecture, construction, real estate .......................... 6%
- Education .................................. 5%
- Consumer goods .......................... 5%
- Media and communications ............ 5%
- Other ........................................ 15%

### Company Size

- Small (21–100 employees) ................. 22%
- Medium (101–3,500 employees) ........... 49%
- Enterprise (3,501+ employees) .......... 29%

### Business Model

- Business-to-business (B2B) ............... 15%
- Business-to-consumer (B2C) .............. 40%
- Business-to-business-to-consumer (B2B2C) ........... 45%

### Country

- United States ................................ 20%
- Brazil ......................................... 9%
- Mexico ........................................ 9%
- Australia / New Zealand .................... 8%
- Canada ........................................ 8%
- France ........................................ 8%
- Germany ...................................... 8%
- India .......................................... 8%
- Japan .......................................... 8%
- United Kingdom / Ireland .................. 8%
- Nordics (Denmark, Finland, Norway, Sweden) .......... 4%
- Singapore ................................... 4%

### Region

- North America ............................. 28%
- Europe ........................................ 28%
- Asia Pacific ................................. 28%
- Latin America .............................. 17%

### Role within Service

- VP, SVP, EVP, or equivalent ............ 7%
- Team leader, supervisor, manager, director, or equivalent ............. 47%
- Office- or store-based service or support agent ............................. 32%
- Mobile-based service or support worker ................................. 14%

### Seniority

- Decision maker ............................ 54%
- Operational level employee ............. 46%

### Generation

- Baby boomers / Traditionalists (born before 1965) ........ 11%
- Gen Xers (born 1965–1980) ............... 35%
- Millennials / Gen Zers (born 1981–1999) .............. 53%