THIRD EDITION

State of **Service**

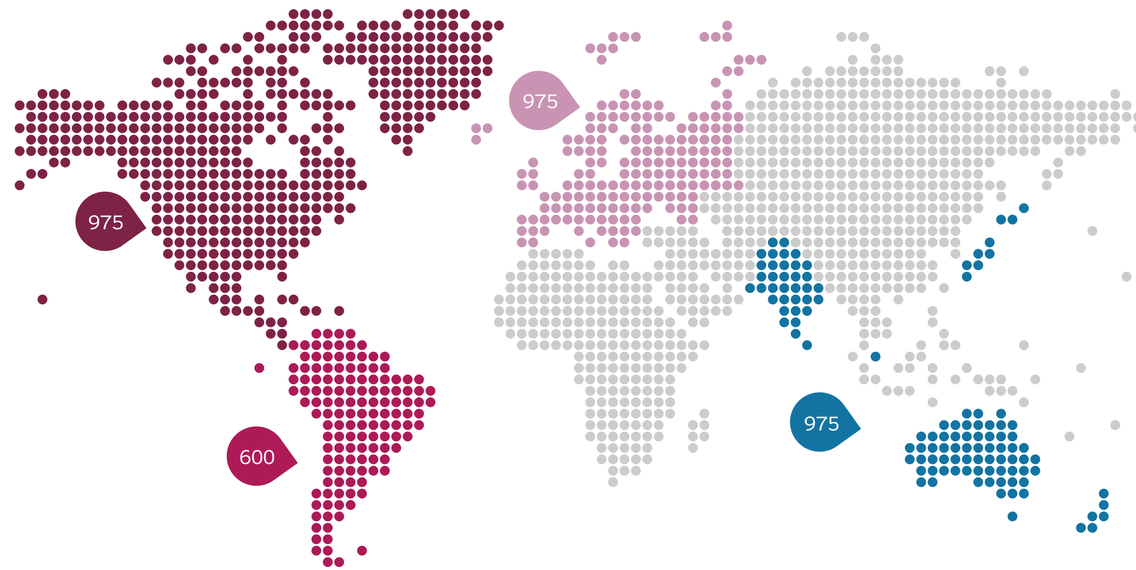
Insights and trends from over 3,500
service leaders and agents worldwide

salesforce research

About This Report

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

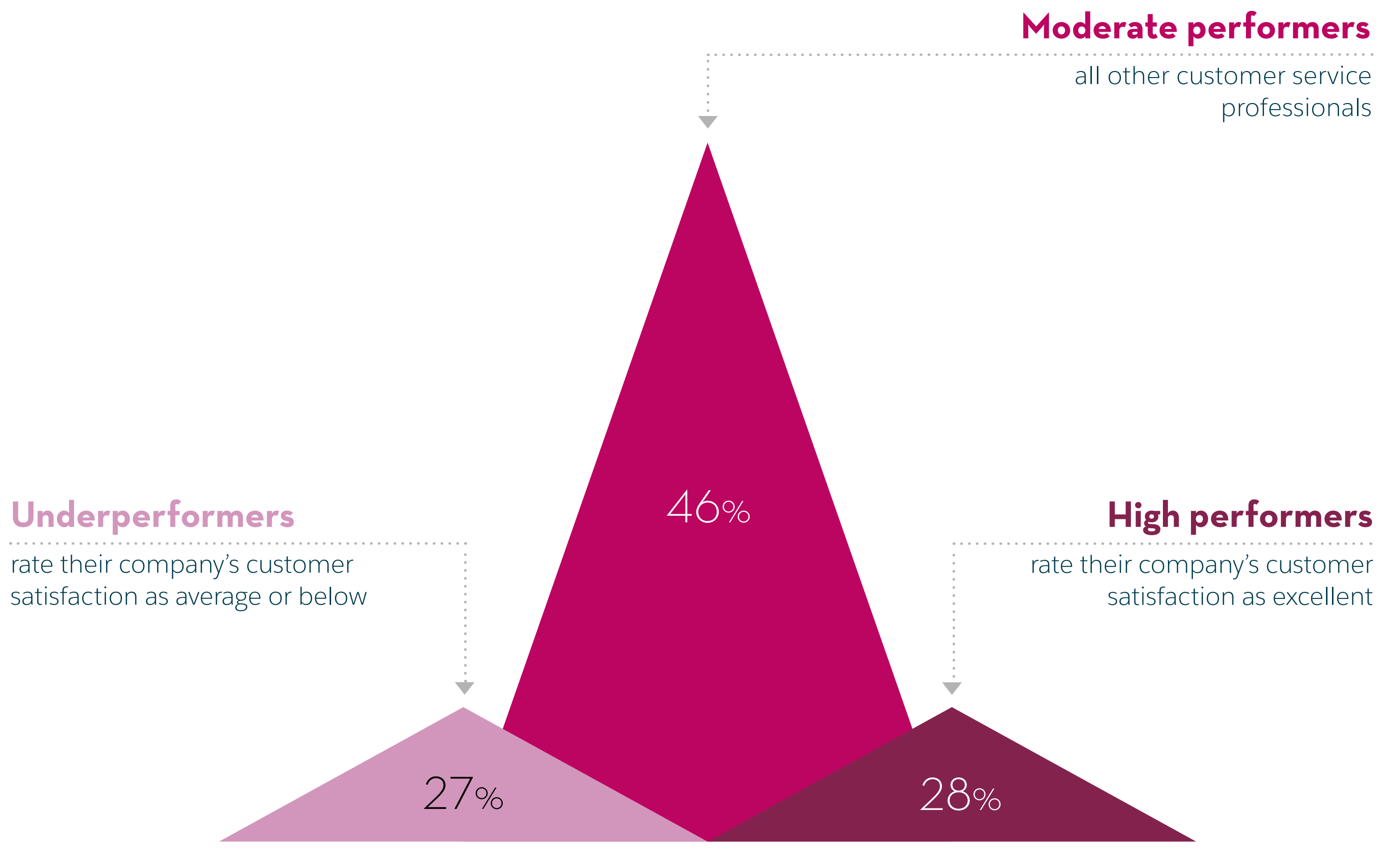
Mobile Workers
Front-line field service workers who interact with customers "in the field" at a customer's home or place of work

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

High-performing customer service teams represent 28% of the survey sample. Customer service professionals surveyed include B2C, B2B, and B2B2C teams.



Contents

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.**

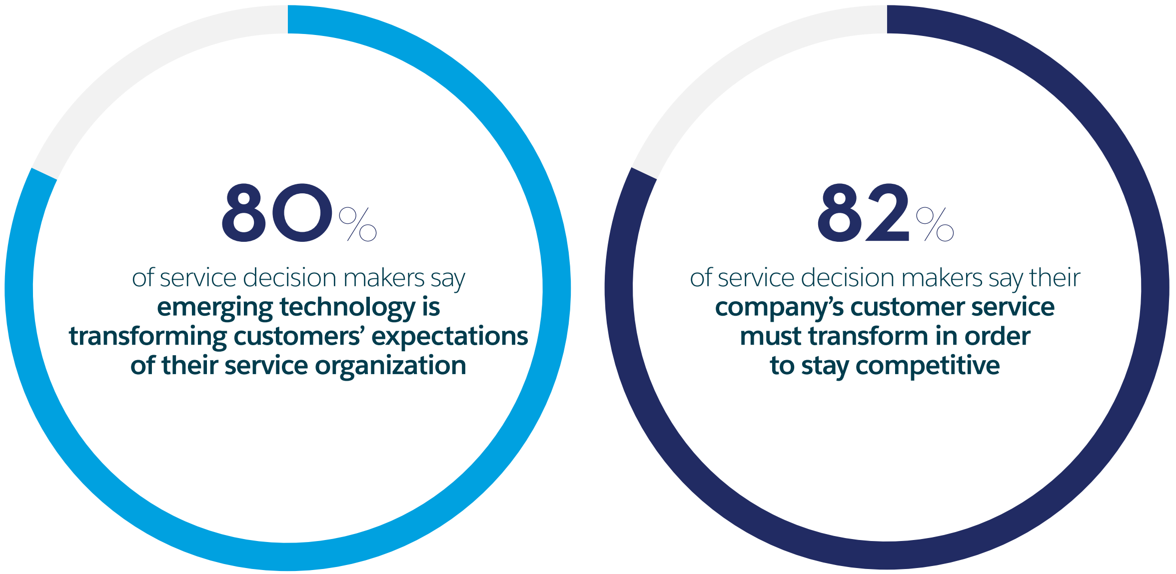
01 The Fourth Industrial Revolution Drives Service Transformation

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.*

Service Transformation is Viewed as a Competitive Must



* "State of the Connected Customer," Salesforce Research, June 2018.

01 The Fourth Industrial Revolution Drives Service Transformation

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

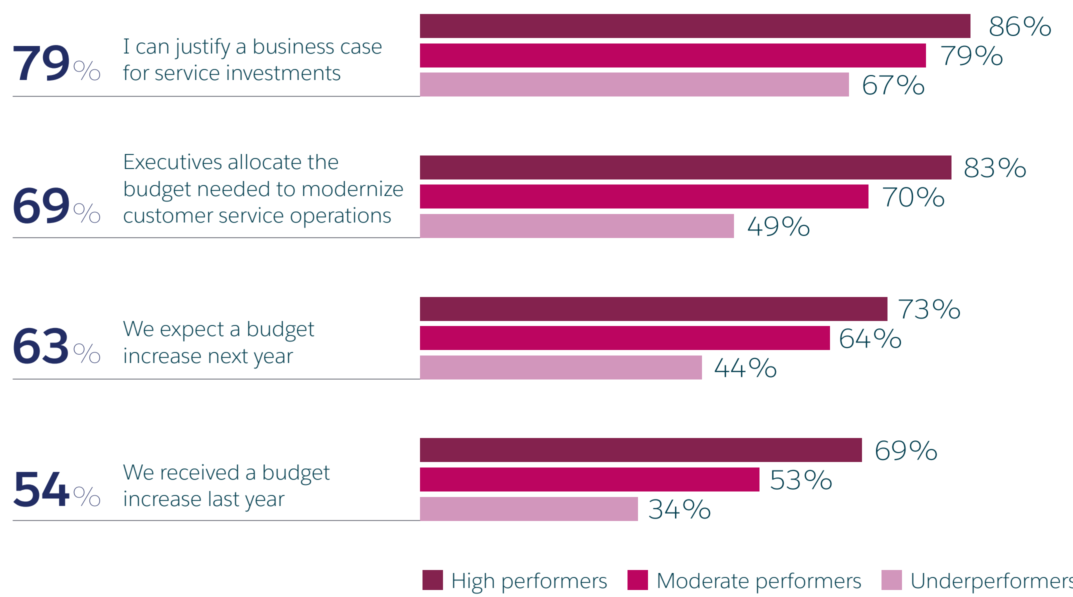
Looking ahead, executives increasingly understand that customer service transformation requires an investment of time, talent, and, resources. Nearly seven in 10 decision makers say executives allocate the budget needed to modernize customer service operations. What's more, the majority of service teams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

High Performers vs. Underperformers

2.0x more likely to have received budget increases last year.

Businesses Are Investing in Service Transformation

Service Decision Makers Who Agree with the Following Statements



Data represents service decision maker responses.

01 The Fourth Industrial Revolution Drives Service Transformation

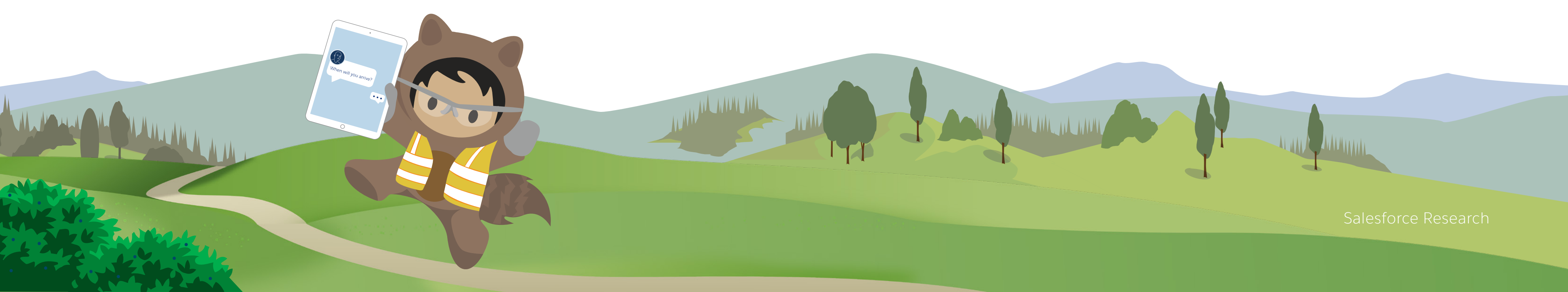
Customer service transformation is shaking up priorities. First and foremost, service decision makers seek to bring their most valuable resource – their employees – up to task by arming them with the skills they need. This is an ongoing, rather than one-and-done, initiative. This top objective is followed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

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

* 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.



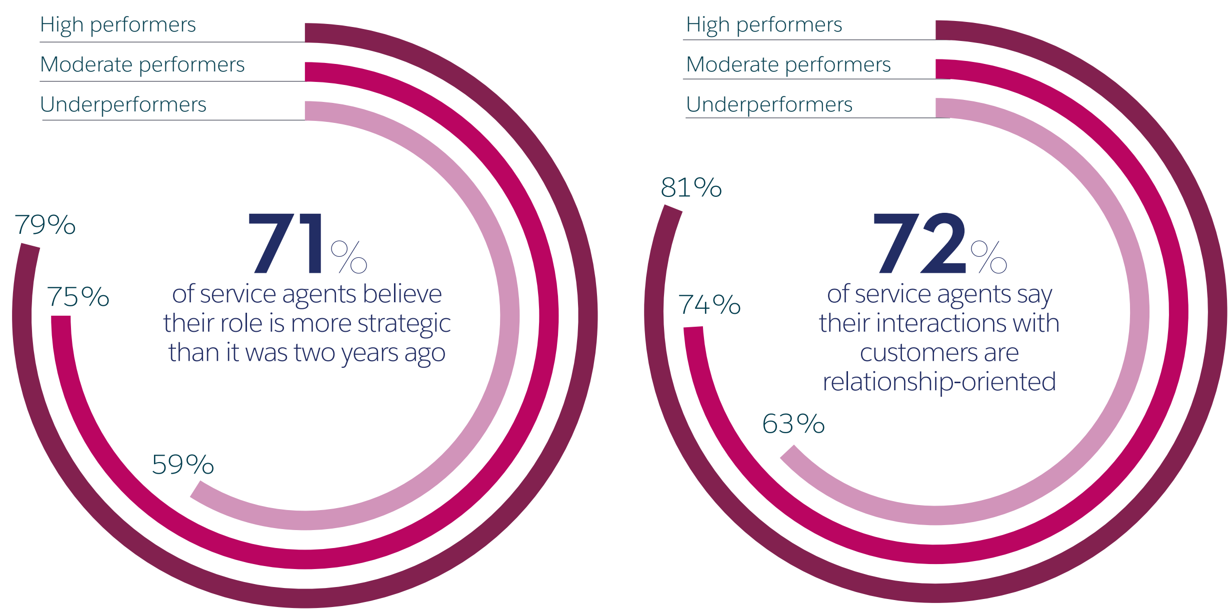
02 Agents Take a Step Up

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



02 Agents Take a Step Up

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.

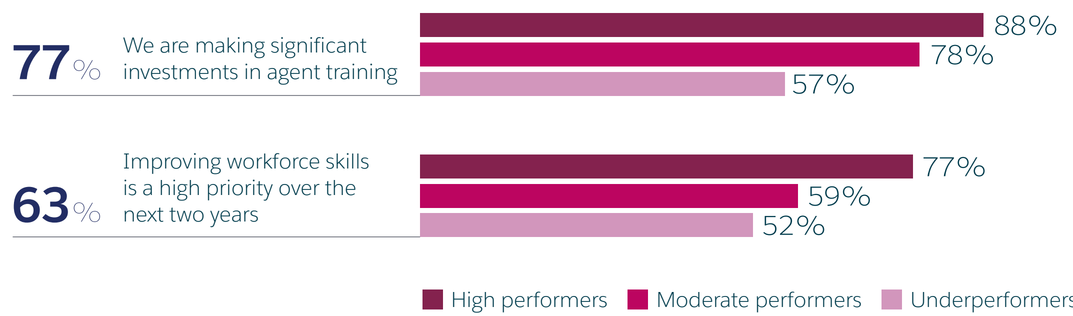
63% of agents at high-performing organizations spend most of their time solving complex issues, versus 43% at underperforming organizations.

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.

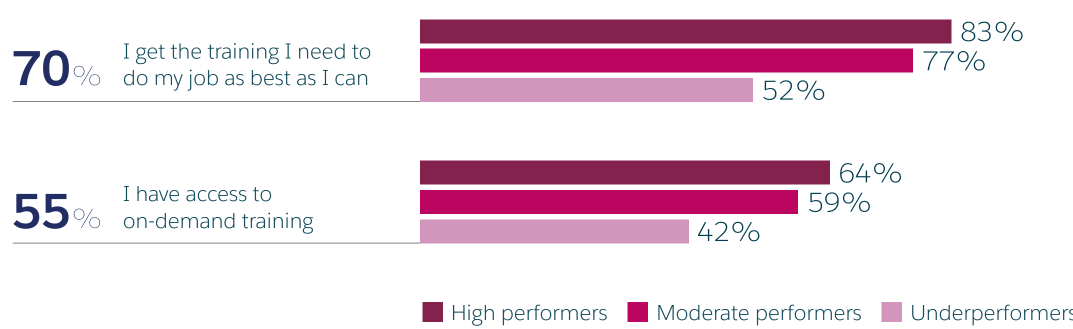
These investments are paying off. At the same time agents take on more challenging work, 70% of them say they get the training they need to do their jobs well, and over half (55%) even have access to on-demand training that allows them to learn when and where it works for them.

Investment in Agents Correlates with Service Performance

Service Decision Makers Who Agree with the Following



Service Agents Who Say the Following



02 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.**

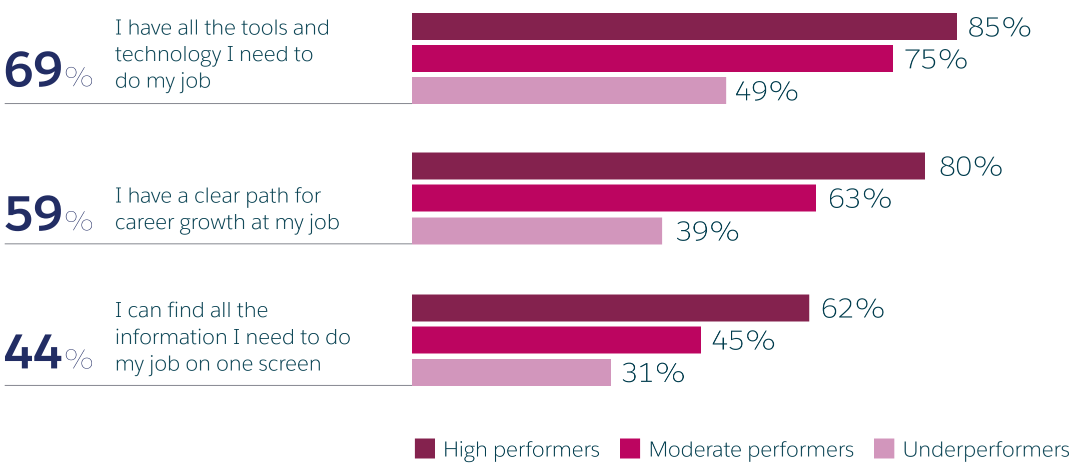
Beyond training and technology, however, is a less tangible aspect of agents' transformation: a sense of purpose. As it turns out, the prospects for continued career development and progression aren't yet evident for some agents, with top organizations providing clearer or more robust opportunities for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

High Performers vs. Underperformers

2.0x more likely for agents to have a clear path for career growth.

Top Teams Give Agents Intuitive Technology and Career Opportunities

Service Agents Who Say the Following



03 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.

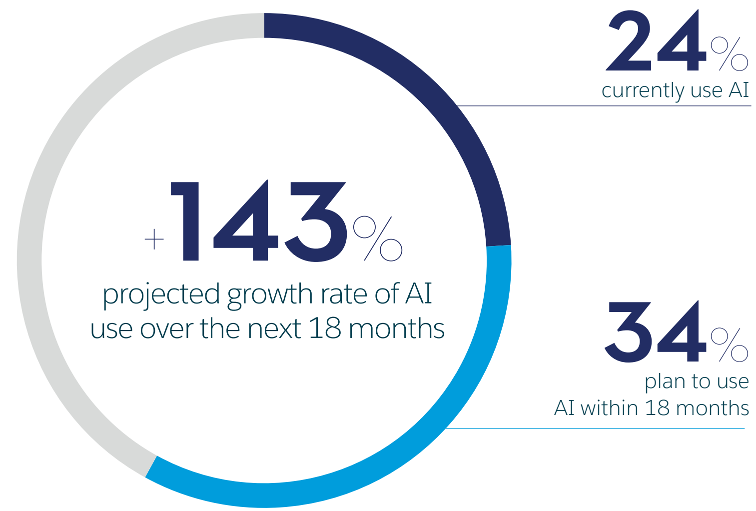
Top teams stand apart from the competition with their early embrace of AI. In fact, **high-performing service organizations are 2.9x more likely than underperformers to use AI**, and are outpacing underperformers when it comes to defining the role it will play moving forward.

High Performers vs. Underperformers

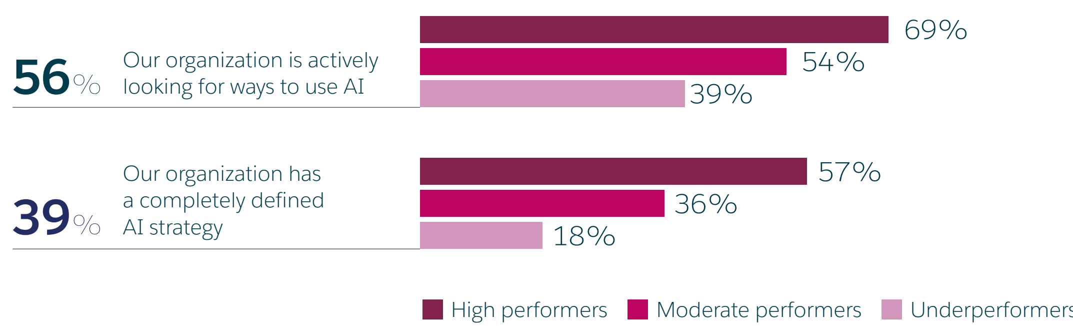
3.2x more likely to have a completely defined AI strategy.

Customer Service Is Poised for an AI Revolution

Use or Planned Use of AI Among Service Organizations



Service Decision Makers Who Say the Following



Unless otherwise noted, data represents service decision maker responses.

03 AI's Impact Takes Shape

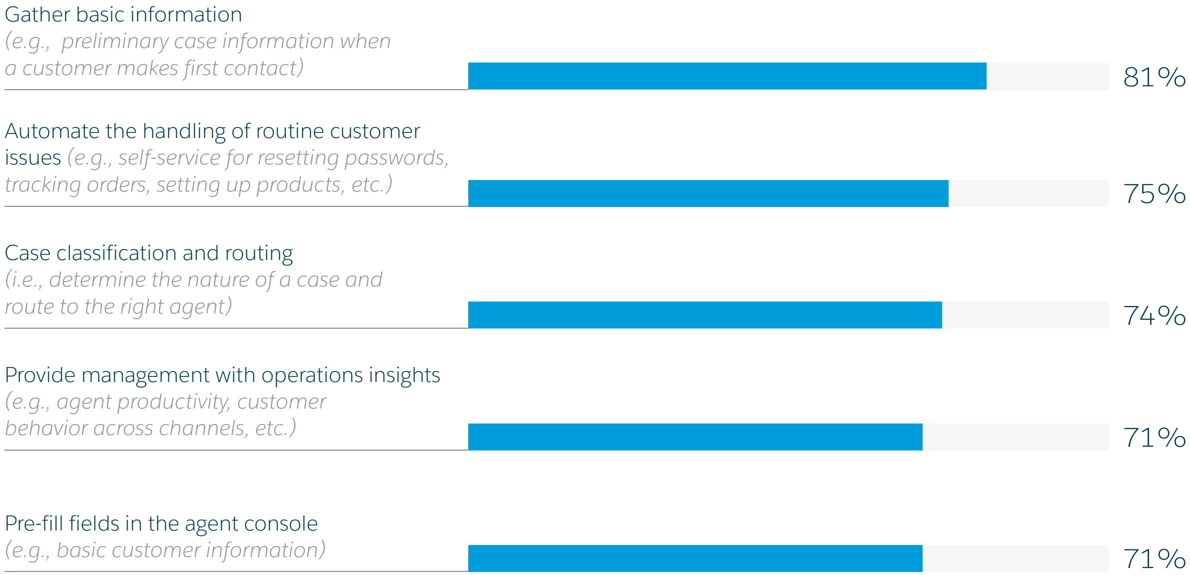
Although AI, as a term, has entered the public vernacular, its applications and implications can seem puzzling or futuristic. Within customer service circles, however, its common use cases are hardly things of science fiction.

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.

Agents' Needs Are at the Heart of Common AI Use Cases

Service Organizations with AI That Use It in the Following Ways



SPOTLIGHT
Chatbots Lend a Hand

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.

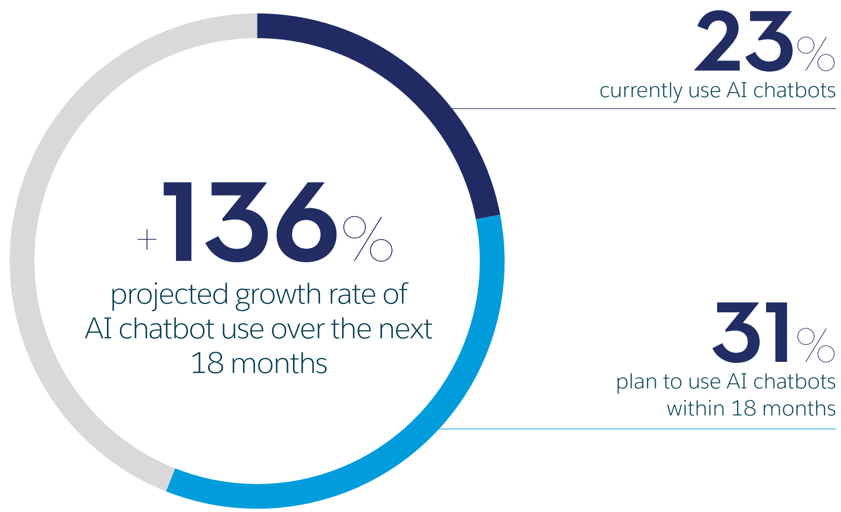
64% of agents *with* AI chatbots are able to spend most of their time solving complex problems, versus 50% of agents *without* AI chatbots.

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

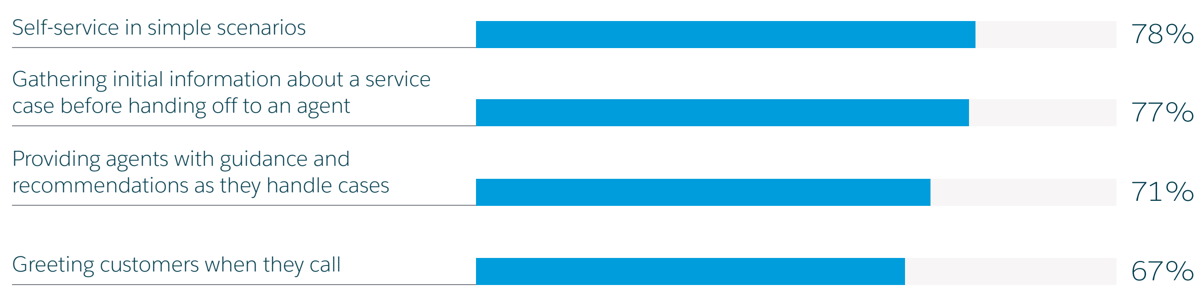
Unless otherwise noted, data represents service decision maker responses.

AI Chatbots Are Set for an Expanded Role in Customer Service

Use or Planned Use of AI Chatbots Among Service Organizations



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



* Data represents responses of service professionals at organizations that use AI chatbots.

03 AI's Impact Takes Shape

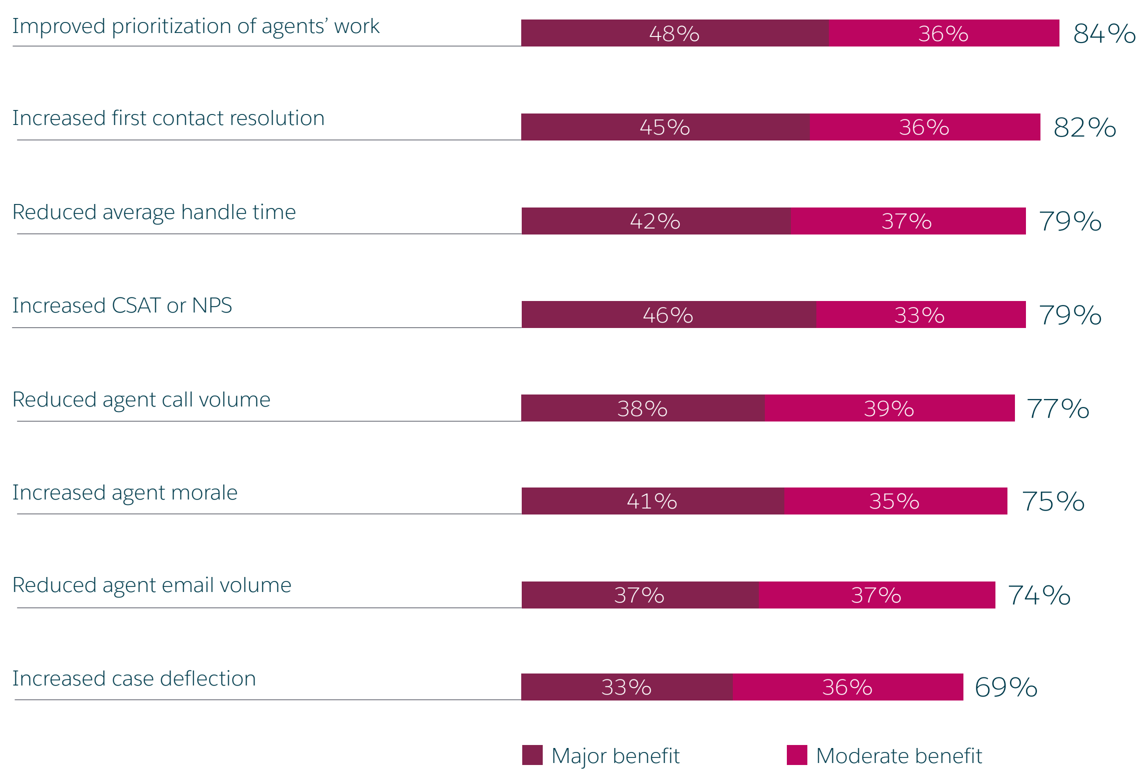
If service organizations are turning to AI to help scale support and elevate the role of agents, their efforts appear to be working. **Eighty-four percent of customer service organizations using AI have seen improved prioritization of agents' work** – the biggest impact cited. Similarly, no fewer than 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.

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

Service Professionals with AI Who Report the Following Benefits



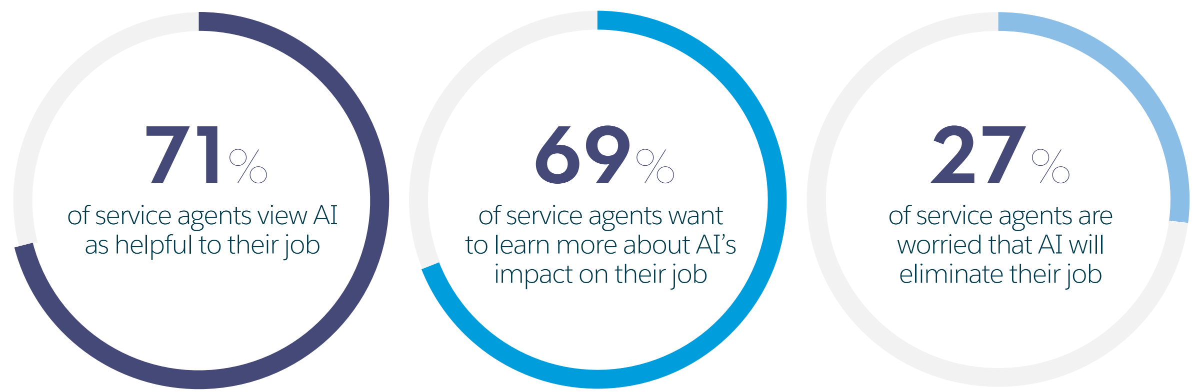
03 AI's Impact Takes Shape

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



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.

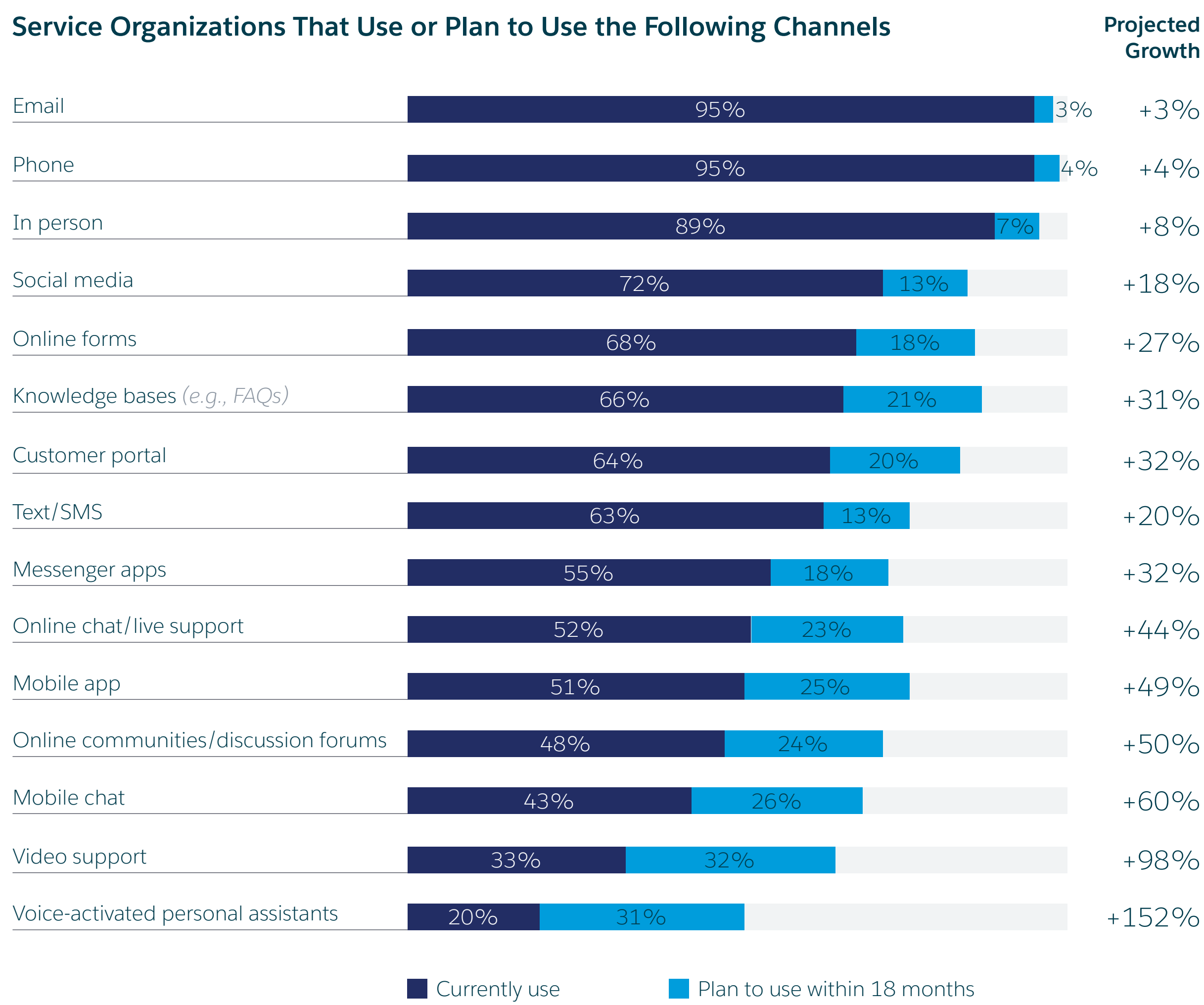
While tried-and-true channels like phone and email have near-universal adoption, customer service is on the cusp of a digital revolution. **Sixty-six percent of service professionals say their organization is seeing increased case volume through digital channels.**

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



Unless otherwise noted, data represents service decision maker responses.
* "State of the Connected Customer," Salesforce Research, June 2018.
See page 52 for performance data.

04 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.

Agents and Leadership View Omni-Channel Capabilities Differently

* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.
See page 53 for performance data.

04 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

* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.
See page 53 for performance data.

04 Customer Engagement Goes Digital and Cross-Functional

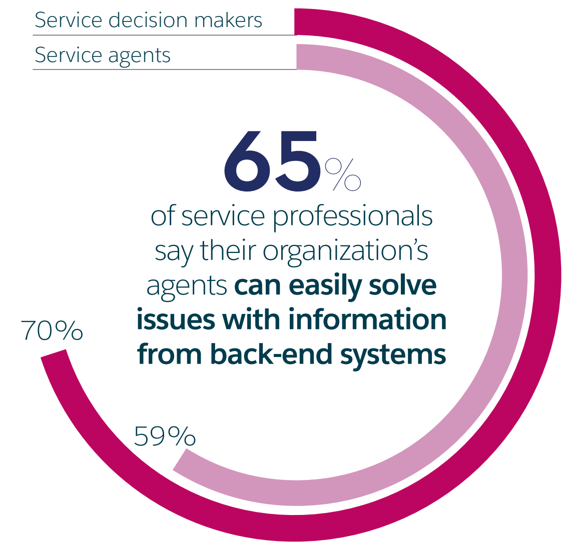
The average digital transaction touches 35 different systems, and the average enterprise uses 1,000 different applications.* While this data proliferation can empower agents to provide highly personalized service across the customer journey, disconnected sources can stand in the way.

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



* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.

05 Mobile Workers Become the Face of Brands

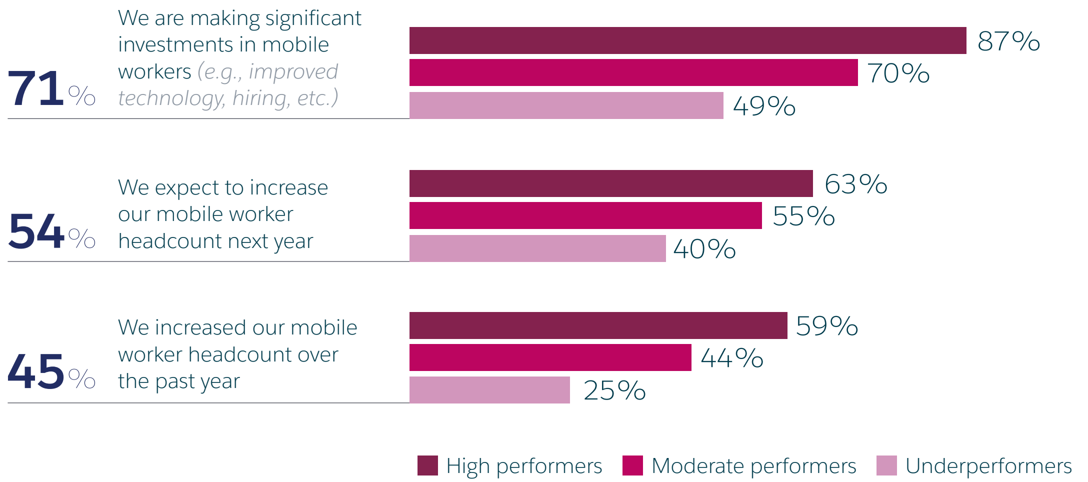
Customers are 2.6x more likely to say service that *comes to them* is important versus unimportant.* It's little surprise, then, that **84% of service decision makers cite improved or expanded mobile service offerings and operations as a priority**.**

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



Unless otherwise noted, data represents responses of service decision makers with mobile workers.
* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.
** 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.

05 Mobile Workers Become the Face of Brands

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.

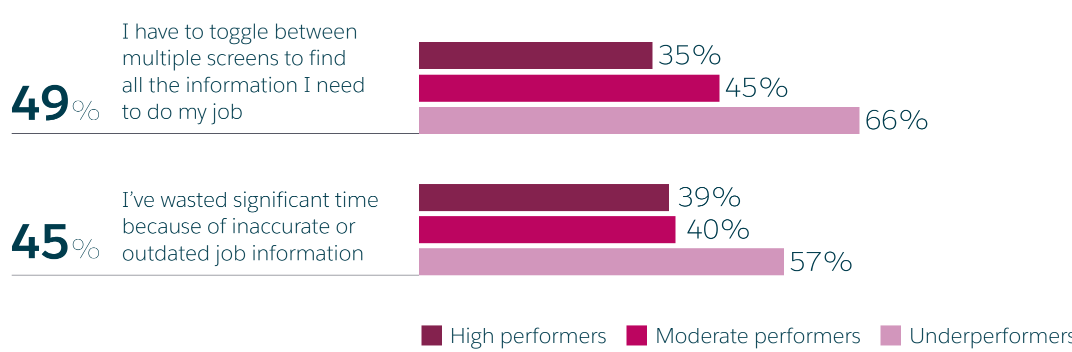
Yet leaders' perceptions of their mobile workforces' technological capabilities may not match the reality. Nearly half (49%) of mobile workers – including 66% of underperformers – toggle through multiple screens to complete their tasks. Nearly half (45%) – including 57% of underperformers – have wasted 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



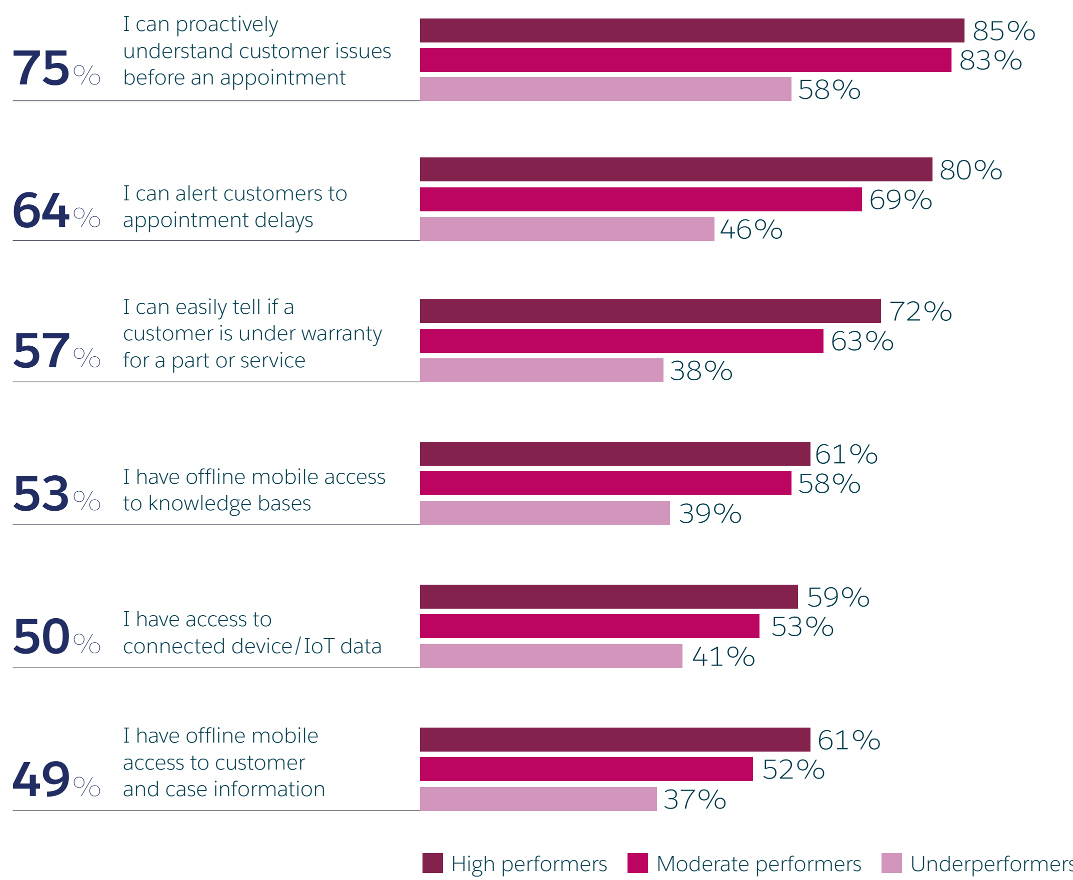
05 Mobile Workers Become the Face of Brands

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



Last Look

Service Metrics Expand and Get More Specific

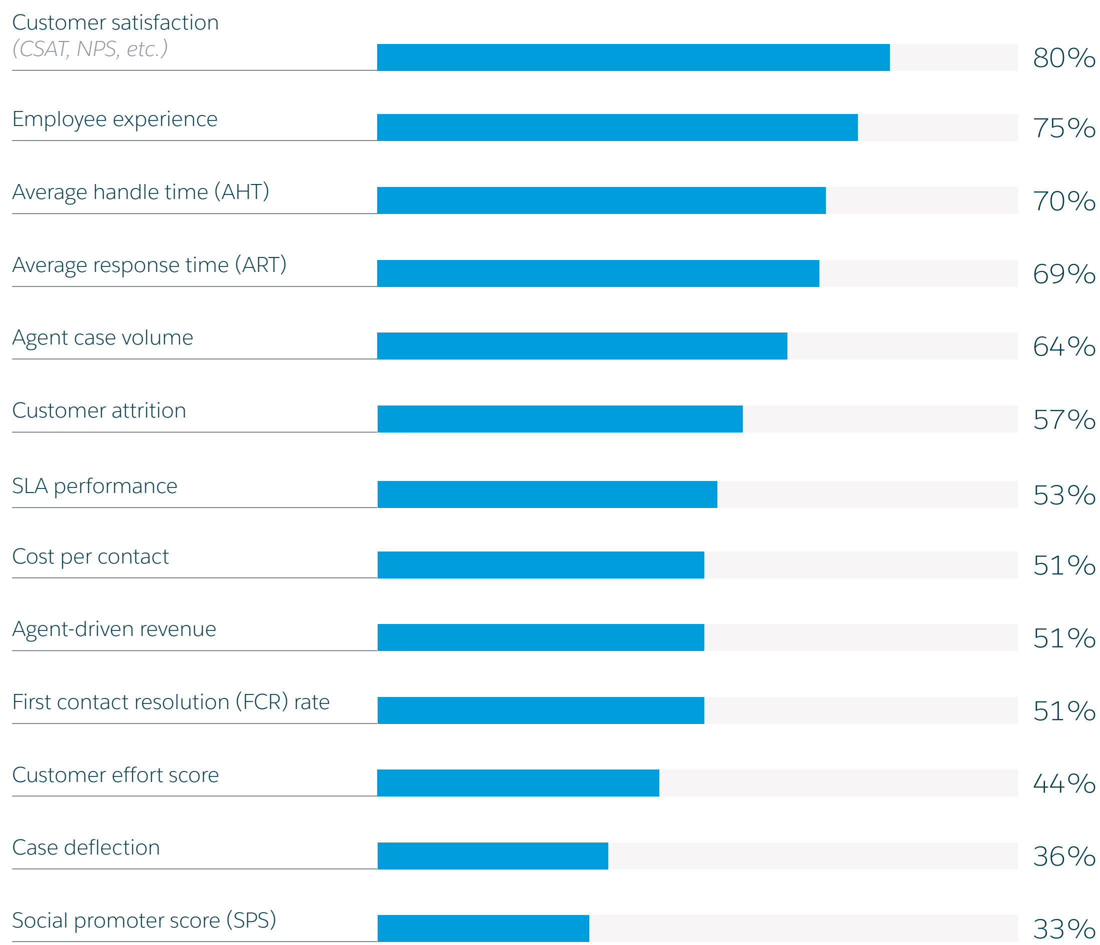
Before service expanded beyond the call center, it was seen as a necessary evil by the boardroom, and metrics focused on keeping costs low. With their pivot to a source of revenue and driver of loyalty, customer service teams must now consider expanded definitions of success. While tried-and-true KPIs 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



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

75% 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

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence[†]: 28% currently use, 28% plan to use — 100% projected growth rate

AI chatbots[†]: 21% currently use, 27% plan to use — 130% projected growth rate

Customer Engagement Goes Digital and Cross-Functional

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

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[‡]

[*] 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

3 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

90% 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

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*

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	31%	42%	133%
AI chatbots†	30%	41%	137%

Customer Engagement Goes Digital and Cross-Functional

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

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

Sales	83%
Commerce	76%
Marketing	73%

Mobile Workers Become the Face of Brands

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‡

* 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

73% 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

Agents Take a Step Up

73% of service decision makers are making significant investments in agent training

50% of service decision makers say improving workforce skills is a high priority*

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

AI's Impact Takes Shape

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	15%	23%	153%
AI chatbots†	10%	18%	175%

Customer Engagement Goes Digital and Cross-Functional

52% of service professionals say their organization is seeing increased case volume through digital channels

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 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
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

85% of service decision makers say emerging technology is transforming customers' expectations of their service organization

69% of service decision makers say their company's customer service must transform in order to stay competitive

Agents Take a Step Up

68% of service decision makers are making significant investments in agent training

53% of service decision makers say improving workforce skills is a high priority*

68% of service agents say they have all the tools and technology they need to do their job

64% of service agents say they can find all the information they need to do their job on one screen

57% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 14% | 33% — 229% projected growth rate

AI chatbots† — 17% | 31% — 180% projected growth rate

Customer Engagement Goes Digital and Cross-Functional

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

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 service decision maker responses.
‡ 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

3 Improving service technologies

Tie for first/second top service priorities.

Top Service Challenges**

1 Underskilled agents

2 Agent attrition

3 Budgetary constraints

62% of service decision makers say emerging technology is transforming customers' expectations of their service organization

62% of service decision makers say their company's customer service must transform in order to stay competitive

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*

66% of service agents say they have all the tools and technology they need to do their job

45% of service agents say they can find all the information they need to do their job on one screen

65% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 293% projected growth rate — 13% | 38%

AI chatbots† — 206% projected growth rate — 16% | 33%

Customer Engagement Goes Digital and Cross-Functional

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

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

Sales 83%

Commerce 80%

Marketing 76%

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

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

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*

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	46%	42%	90%
AI chatbots†	40%	47%	118%

Customer Engagement Goes Digital and Cross-Functional

88% of service professionals say their organization is seeing increased case volume through digital channels

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% say the experience a customer has with a mobile worker is a reflection of their brand‡

92% 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‡

* 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
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

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

Agents 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*

45% of service agents say they have all the tools and technology they need to do their job

26% of service agents say they can find all the information they need to do their job on one screen

41% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	33%	32%	98%
AI chatbots†	38%	23%	61%

Customer Engagement Goes Digital and Cross-Functional

48% of service professionals say their organization is seeing increased case volume through digital channels

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‡

* 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

93% of service decision makers say emerging technology is transforming customers' expectations of their service organization

95% of service decision makers say their company's customer service must transform in order to stay competitive

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*

82% of service agents say they have all the tools and technology they need to do their job

72% of service agents say they can find all the information they need to do their job on one screen

88% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	17%	50%	300%
AI chatbots†	21%	45%	211%

Customer Engagement Goes Digital and Cross-Functional

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

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

- Sales 91%
- Commerce 88%
- Marketing 80%

Mobile Workers Become the Face of Brands

94% 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‡

53% have increased mobile worker headcount over the past year‡

66% 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

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

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

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 36% currently use, 29% plan to use — 80% projected growth rate

AI chatbots† — 36% currently use, 25% plan to use — 69% projected growth rate

Customer Engagement Goes Digital and Cross-Functional

73% of service professionals say their organization is seeing increased case volume through digital channels

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

94% 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‡

53% have increased mobile worker headcount over the past year‡

66% 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
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

89% of service decision makers say emerging technology is transforming customers' expectations of their service organization

91% of service decision makers say their company's customer service must transform in order to stay competitive

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*

89% of service agents say they have all the tools and technology they need to do their job

58% of service agents say they can find all the information they need to do their job on one screen

66% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 267% projected growth rate — 19% | 49%

AI chatbots† — 125% projected growth rate — 29% | 36%

Customer Engagement Goes Digital and Cross-Functional

73% of service professionals say their organization is seeing increased case volume through digital channels

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

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

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*

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — **177%** projected growth rate — 15% | 27%

AI chatbots† — **165%** projected growth rate — 14% | 23%

Customer Engagement Goes Digital and Cross-Functional

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

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

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‡

28% have increased mobile worker headcount over the past year‡

41% 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 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

71% of service decision makers say emerging technology is transforming customers' expectations of their service organization

80% of service decision makers say their company's customer service must transform in order to stay competitive

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*

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 14% | 23% — **174%** projected growth rate

AI chatbots† — 7% | 19% — **252%** projected growth rate

Customer Engagement Goes Digital and Cross-Functional

59% of service professionals say their organization is seeing increased case volume through digital channels

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

- Sales: **80%**
- Commerce: **80%**
- Marketing: **75%**

Mobile Workers Become the Face of Brands

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‡

36% have increased mobile worker headcount over the past year‡

39% 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*

* 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

Tie for third/fourth top service challenges.

82% of service decision makers say emerging technology is transforming customers' expectations of their service organization

85% of service decision makers say their company's customer service must transform in order to stay competitive

Agents Take a Step Up

79% of service decision makers are making significant investments in agent training

59% of service decision makers say improving workforce skills is a high priority*

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

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	22%	40%	183%
AI chatbots†	22%	41%	187%

Customer Engagement Goes Digital and Cross-Functional

71% of service professionals say their organization is seeing increased case volume through digital channels

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‡

51% 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

90% of service decision makers say emerging technology is transforming customers' expectations of their service organization

87% of service decision makers say their company's customer service must transform in order to stay competitive

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — **78%** projected growth rate — 41% currently use; 32% plan to use within 18 months

AI chatbots† — **116%** projected growth rate — 32% currently use; 37% plan to use within 18 months

Customer Engagement Goes Digital and Cross-Functional

72% of service professionals say their organization is seeing increased case volume through digital channels

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

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

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

83% of service decision makers say emerging technology is transforming customers' expectations of their service organization

79% of service decision makers say their company's customer service must transform in order to stay competitive

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*

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 13% | 29% — 217% projected growth rate

AI chatbots† — 9% | 18% — 200% projected growth rate

Customer Engagement Goes Digital and Cross-Functional

62% of service professionals say their organization is seeing increased case volume through digital channels

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

Sales 77%

Commerce 81%

Marketing 71%

Mobile Workers Become the Face of Brands

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‡

* 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
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
3 Ineffective or inefficient processes

Tie for first/second top service challenges.

76% 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

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*

65% of service agents say they have all the tools and technology they need to do their job

42% of service agents say they can find all the information they need to do their job on one screen

62% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	18%	30%	163%
AI chatbots†	15%	24%	167%

Customer Engagement Goes Digital and Cross-Functional

59% of service professionals say their organization is seeing increased case volume through digital channels

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

89% say the experience a customer has with a mobile worker is a reflection of their brand‡

72% say they provide mobile workers with the technology and resources they need to do their jobs well‡

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

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

Agents Take a Step Up

78% of service decision makers are making significant investments in agent training

61% of service decision makers say improving workforce skills is a high priority*

85% of service agents say they have all the tools and technology they need to do their job

54% of service agents say they can find all the information they need to do their job on one screen

59% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	22%	38%	173%
AI chatbots†	24%	33%	137%

Customer Engagement Goes Digital and Cross-Functional

70% of service professionals say their organization is seeing increased case volume through digital channels

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

Sales	81%
Commerce	81%
Marketing	79%

Mobile Workers Become the Face of Brands

90% say the experience a customer has with a mobile worker is a reflection of their brand‡

83% say they provide mobile workers with the technology and resources they need to do their jobs well‡

40% 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

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

Tie for third/fourth top service challenges.

81% of service decision makers say emerging technology is transforming customers' expectations of their service organization

88% of service decision makers say their company's customer service must transform in order to stay competitive

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*

72% 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

48% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 142% projected growth rate — 29% | 40%

AI chatbots† — 63% projected growth rate — 42% | 26%

Customer Engagement Goes Digital and Cross-Functional

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

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

Sales 82%

Commerce 80%

Marketing 74%

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.

Industry Profiles

Retail (375 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. Underskilled agents

80% 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

Agents Take a Step Up

78% of service decision makers are making significant investments in agent training

60% of service decision makers say improving workforce skills is a high priority*

63% of service agents say they have all the tools and technology they need to do their job

48% of service agents say they can find all the information they need to do their job on one screen

59% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

	Currently use	Plan to use within 18 months	Projected growth rate
Artificial intelligence†	26%	28%	105%
AI chatbots†	28%	25%	89%

Customer Engagement Goes Digital and Cross-Functional

64% of service professionals say their organization is seeing increased case volume through digital channels

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

90% 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‡

41% 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
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

89% of service decision makers say emerging technology is transforming customers' expectations of their service organization

79% of service decision makers say their company's customer service must transform in order to stay competitive

Agents Take a Step Up

83% of service decision makers are making significant investments in agent training

70% of service decision makers say improving workforce skills is a high priority*

75% of service agents say they have all the tools and technology they need to do their job

47% of service agents say they can find all the information they need to do their job on one screen

69% of service agents say they have a clear path for career growth at their job

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 39% / 42% — **106%** projected growth rate

AI chatbots† — 35% / 39% — **113%** projected growth rate

Customer Engagement Goes Digital and Cross-Functional

73% of service professionals say their organization is seeing increased case volume through digital channels

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% say the experience a customer has with a mobile worker is a reflection of their brand‡

86% say they provide mobile workers with the technology and resources they need to do their jobs well‡

57% have increased mobile worker headcount over the past year‡

72% 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

Tie for second/third top service priorities.

Top Service Challenges**

1 Keeping up with changing customer expectations

2 Budgetary constraints

3 Underskilled agents

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

Agents Take a Step Up

71% of service decision makers are making significant investments in agent training

73% 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

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

AI's Impact Takes Shape

Currently use | Plan to use within 18 months

Artificial intelligence† — 187% projected growth rate — 16% | 31%

AI chatbots† — 241% projected growth rate — 12% | 29%

Customer Engagement Goes Digital and Cross-Functional

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

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

Sales 83%

Commerce 80%

Marketing 74%

Mobile Workers Become the Face of Brands

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‡

* 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

Appendix
Industry and Country: Disparity Data Gaps

Share of High Performers and Underperformers

	BY INDUSTRY		BY COUNTRY	
	Lowest	Highest	Lowest	Highest
High Performers	15% Government	34% Travel, transportation, and hospitality	18% Germany	52% India
Underperformers	18% Consumer goods	48% Government	7% India	41% Japan

Adoption of Tools and Technologies*

	BY INDUSTRY		BY COUNTRY	
	Lowest	Highest	Lowest	Highest
Artificial intelligence (AI)	13% Education	41% Financial services	13% Germany	46% India
AI chatbots	9% Government	42% Media and communications	7% United States	40% India
Voice-activated personal assistants	13% Government	30% Financial services	9% Canada	37% Brazil

Organizations Actively Looking for Ways to Use AI*

	Lowest	Highest
BY INDUSTRY	37% Government	77% Technology
BY COUNTRY	29% United States	88% India

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

Organizations Seeing More Cases Through Digital Channels

BY INDUSTRY

Lowest	Highest
59% Healthcare and life sciences	73% Technology

BY COUNTRY

Lowest	Highest
48% Japan	88% India

Average Number of Channels Used*

BY INDUSTRY

Lowest	Highest
8 Engineering, architecture, construction, real estate	10 Technology

BY COUNTRY

Lowest	Highest
8 Canada	10 India

Agents Who Can Find All Information They Need to Do Their Job on One Screen**

BY INDUSTRY

Lowest	Highest
32% Financial services	59% Consumer goods

BY COUNTRY

Lowest	Highest
26% Japan	77% India

Organizations with an Internal Mobile Workforce

BY INDUSTRY

Lowest	Highest
64% Media and communications	82% Engineering, architecture, construction, real estate

BY COUNTRY

Lowest	Highest
60% India	80% France

Organizations with Self-Service as a Major Part of Service Strategy*

BY INDUSTRY

Lowest	Highest
59% Healthcare and life sciences	81% Technology

BY COUNTRY

Lowest	Highest
57% Canada	86% Brazil

Agents with Easy Access to All the Information Needed to Do Their Job**

BY INDUSTRY

Lowest	Highest
63% Education	78% Consumer goods

BY COUNTRY

Lowest	Highest
53% Japan	86% Mexico

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

Industry

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

Business Model

	High Performers	Moderate Performers	Underperformers
Business-to-business (B2B)	20%	45%	35%
Business-to-consumer (B2C)	29%	45%	26%
Business-to-business-to-consumer (B2B2C)	29%	46%	25%

Company Size

	High Performers	Moderate Performers	Underperformers
Small (21–100 employees)	32%	46%	23%
Medium (101–3,500 employees)	27%	47%	26%
Enterprise (3,501+ employees)	25%	44%	31%

Region

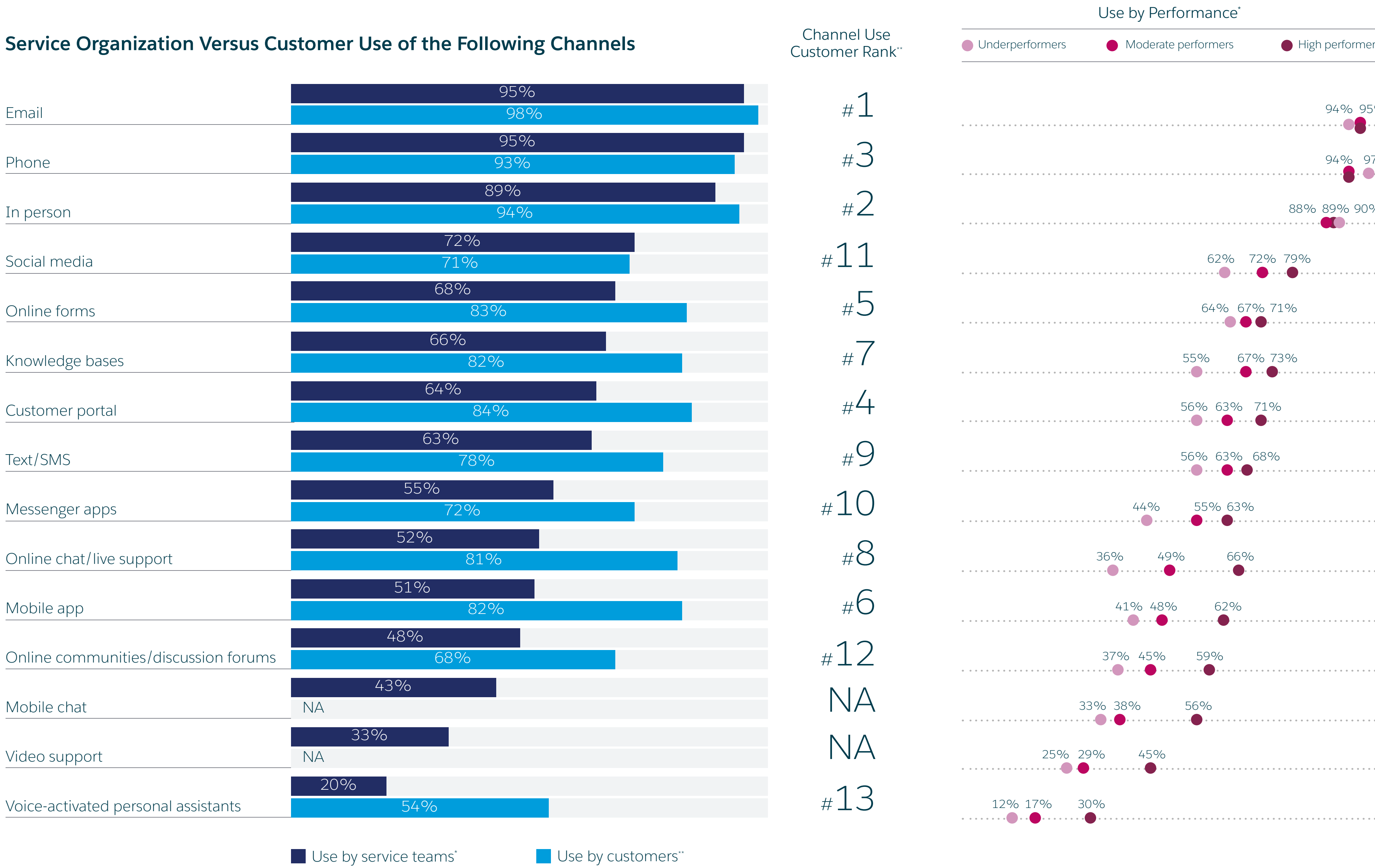
	High Performers	Moderate Performers	Underperformers
North America	27%	44%	29%
Europe	22%	49%	29%
Asia Pacific	32%	43%	25%
Latin America	30%	47%	23%

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

Appendix

Adoption of Channels by Service Teams Compared to Customers

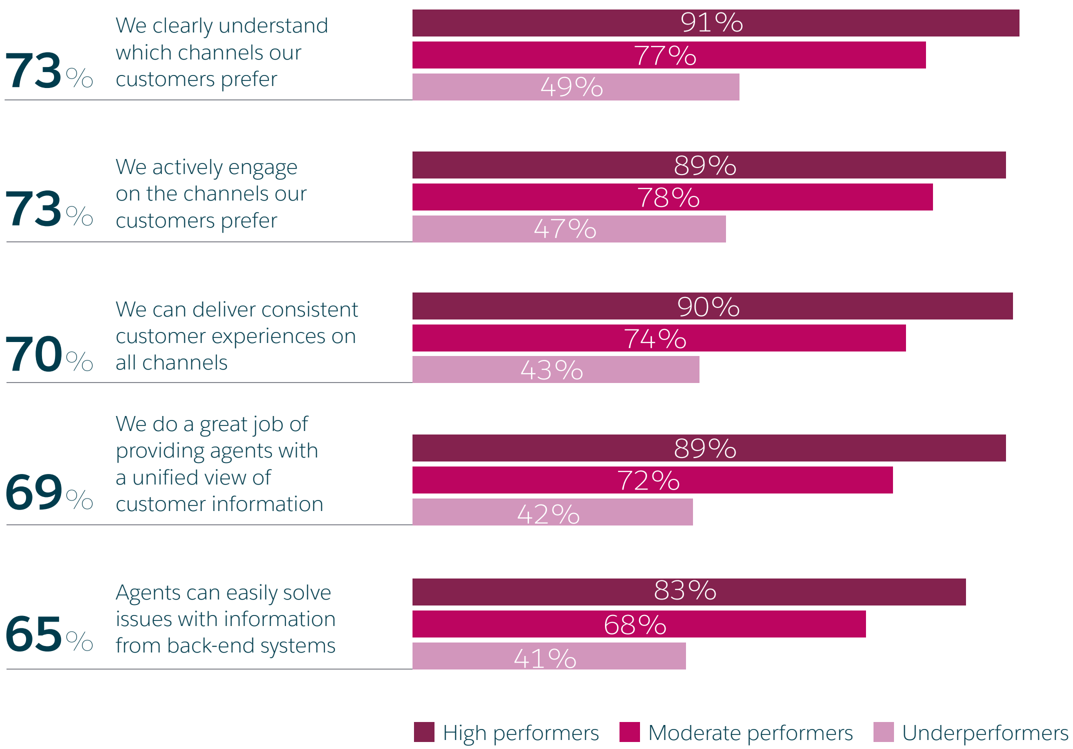
Service Organization Versus Customer Use of the Following Channels



* Data represents service decision maker responses.
** "State of the Connected Customer," Salesforce Research, June 2018.

Appendix
Customer Engagement Goes Digital and Cross-Functional

Service Professionals Who Say the Following About Their Organization



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%

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