



# Building a Case for Service

Your guide to kickstarting a service transformation





# Contents



## Introduction

The state of service in an economic downturn ..... 03

## Automation is the future of service

The case for service transformation. .... 05

## Top-notch service creates loyal customers

Rudi Khoury, Executive Vice President of Marketing and Digital Transformation at Fisher & Paykel Appliances. . . 07

## Prioritise efficient personalisation

Katrina Trenkner, Program Director, Customer Capability, nib Group ..... 09

## Pair ROI with a long-term vision

Brady Jacobsen, General Manager, Digital and Customer Experience at Vocus ..... 11

## Building the case for service transformation

How to get leadership on board ..... 13

## How much will Service Cloud save your business?

Understand your cost-savings benefit, fast ..... 16



# The state of service in an economic downturn



## Belinda Burgess

Area Vice President,  
Service Cloud, Salesforce

**As service leaders, we know that an investment in service is an investment in your company.**

After all, your service employees are your frontline ambassadors. Your agents, portals and chatbots will have the biggest impact on a customer's perception of your brand. Good service will spur repeat purchases and recommendations, while poor service might actively harm your brand's reputation and dissuade future customers.

Here's how customers feel about service in 2022:

**94%**

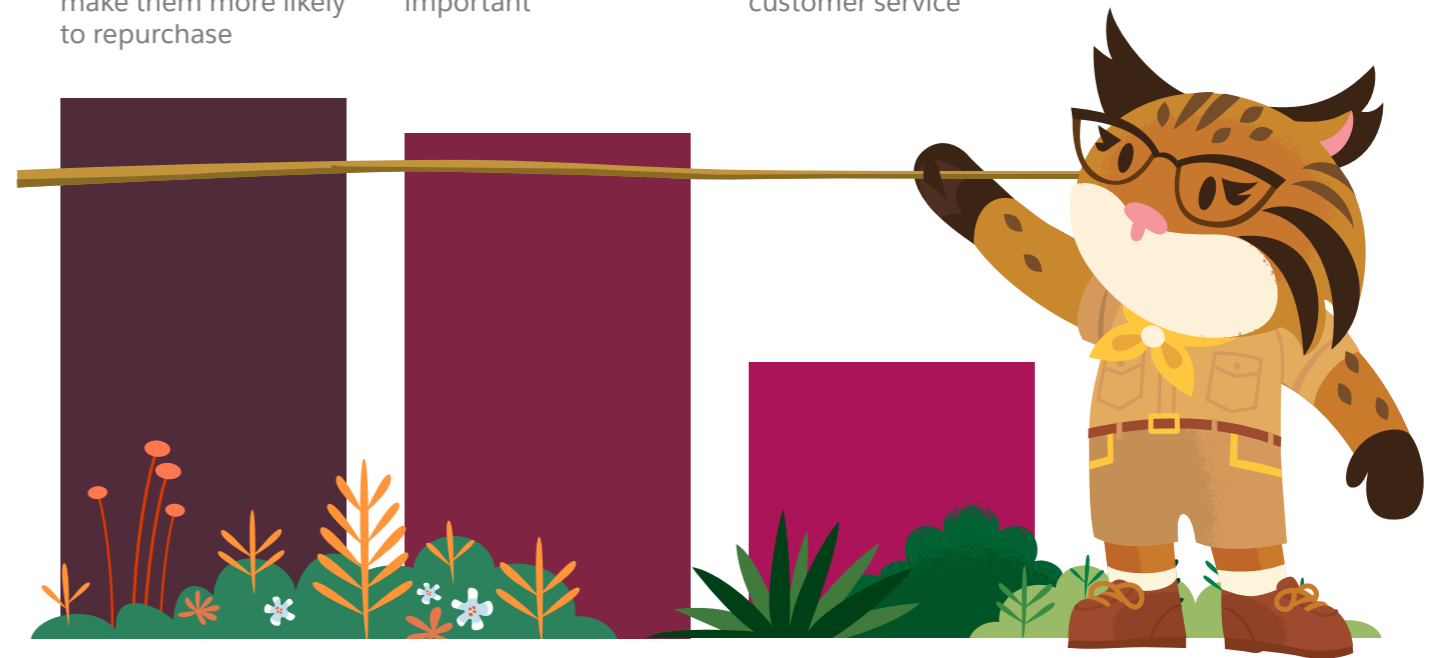
say a positive service experience would make them more likely to repurchase

**88%**

see service and product as equally important

**48%**

have switched brands for better customer service



In times of economic uncertainty, this potential for value must be balanced with efficiency. In service, the key to success right now is not to scale back your service offerings, but to lean into tools that make your services work harder and keep customers happy and loyal.

But how do you do that? You've come to the right place. This e-book will delve into the "how" behind service transformation.

We'll share:

- 1 The key value drivers for service investment
- 2 How to realise ROI quickly
- 3 How Fisher & Paykel, nib Group, and Vocus have revolutionised their service offering and boosted efficiency and productivity
- 4 Guidance on how to create a boardroom-ready business plan that will help you convince decision makers of the imperative of service transformation

I hope this e-book helps you maximise your capabilities amid economic uncertainty, and keep your customers happy and engaged for years to come.



## Scaling connection using automation

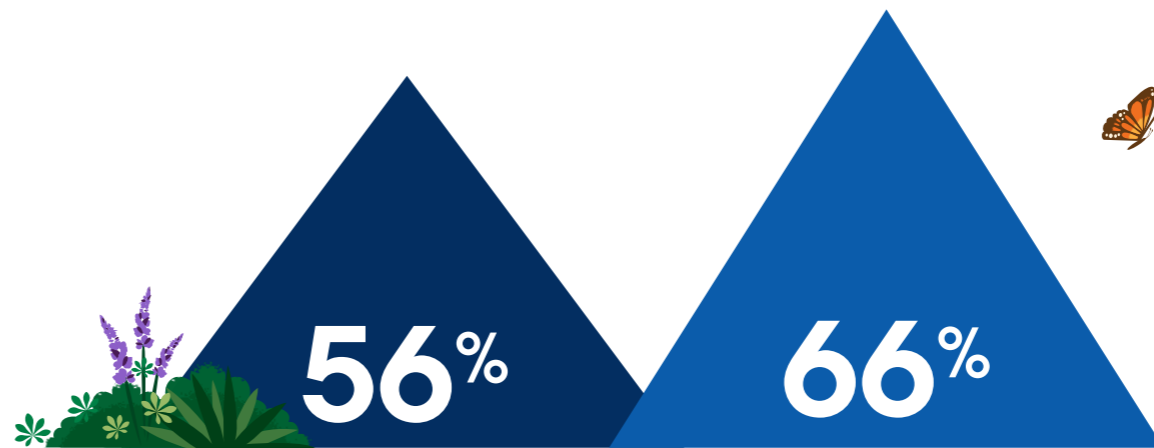
Connection and empathy are at the heart of good service.



In fact,  
**73%**

of customers expect companies to understand their unique needs and expectations.

### Expectations versus reality



of consumers feel like most companies treat them like numbers.

often have to repeat or re-explain information to different representatives.

The good news? Service organisations can harness automation to scale connection and deliver consistent, effective and personalised service experiences, whatever the channel.

Right now, process automation is a staple for nearly four-fifths of service organisations globally. Time saved is the most apparent benefit for automation users, followed closely by connection with other departments and error reduction, among others.

\*State of Service Report, Fifth Edition



Automation helps service leaders improve customer satisfaction and cut costs.



of service organisations use automation



of service organisations use AI (an increase of 24% from 2020)

\*State of Service Report, Fifth Edition

With Customer 360 companies see:



increase in customer satisfaction

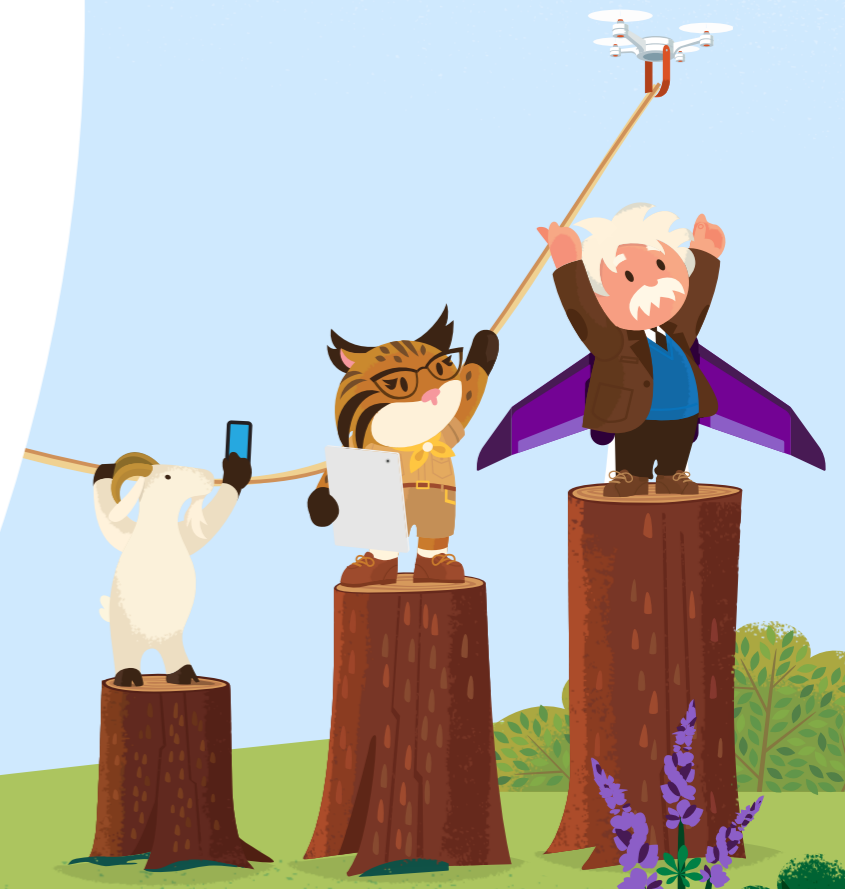


increase in customer retention



decrease in service/support costs

\*2022 Salesforce Success Metrics Global Highlights



## Top-notch service creates loyal customers

By Rudi Khoury, Executive Vice President of Marketing and Digital Transformation at Fisher & Paykel Appliances.

*Fisher & Paykel is an appliance manufacturer with a presence in more than 50 countries. The company boasts a large network of contacts, including builders, designers, retail partners and a legion of dedicated customers. Here, Rudi Khoury discusses how Fisher & Paykel have transformed field service and how to create a business case your execs will listen to.*

### Excellent service is a non-negotiable

Customer success is in our DNA. Fisher & Paykel was built on the premise that customer satisfaction comes first by building products that customers use for years to come.

Doing this well means prizing service at all stages of the purchasing journey – not only before the customer chooses to buy, but also afterwards. Providing top quality support is key to our brand’s reputation and helps us get repeat customers and word-of-mouth recommendations.

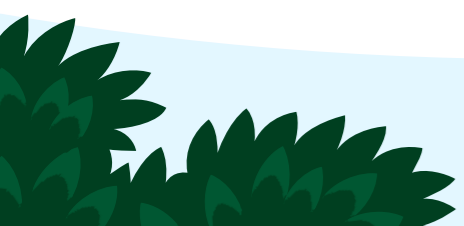
In my view, great service offerings are predicated on having a 360-degree view of a customer and connecting all your departments so everyone is equipped with the knowledge and tools they need to best serve a customer’s needs.

### A people-focused process

Before implementing any change to your service operations, take a step back and examine your existing processes. As Fisher & Paykel is a global company, it was important that we first understood how each workflow played out in our different companies and regions, so we could work out how to streamline them across the board. It’s important to involve your employees in these conversations; they’ll have the best insights on how to improve your processes.



**We’ve seen huge efficiency from implementing a field management tool, with jobs completed skyrocketing by 20–30%”**



Take field service – easily our most expensive and time-consuming operation. By automating the process, there are no more vague wait times or unresponsive field agents. We’ve integrated our field management tools with our service stack so we can give each customer that end-to-end experience. We have self-service online tools for booking, rescheduling and locating a technician or delivery driver.

Now a customer can book an appointment and know that a technician with the right set of skills will arrive at a specific time. And on the back end, we’ve seen huge efficiency from implementing a field management tool, with the number of jobs completed skyrocketing by 20–30%.

### Our approach to business cases

A solid business case for service should balance numbers with strategy. Before you start writing, reflect on what you’re trying to achieve.

Here are some questions you can ask:

- 1 What are you trying to do better?
- 2 What can you afford?
- 3 What will the trade-off be?
- 4 How will you measure its success?

One thing I’ll caution is that you’ll need to view it as a balancing act. If you’re choosing to invest in one area of the business, odds are you’ll need to divest elsewhere. The important thing is that you don’t overinvest in one area while other areas of the business struggle.



Rudi Khoury's advice on building a solid business case:



**Take a qualitative and quantitative approach. Pair the cold hard numbers with strategy and a vision for your customer service.”**





## Prioritise efficient personalisation

By Katrina Trenkner, Program Director,  
Customer Capability, nib Group

*nib Group has employees in seven offices across five countries who work across multiple brands. With this comes an inherent need to standardise our processes and technologies, with the ultimate aim of uplifting every member's experience with us.*

### Consolidate to simplify

When we began our transformation journey, there were 18 disparate systems across the organisation. When we consolidated into one platform, we saw the benefits of a 360-degree view of the customer immediately. In our first month using Service Cloud, the average handling time was cut by 25% and there was a 20% decrease in release and deployment times.

We've also embraced omni-channel routing, meaning every enquiry is sent to the next available agent, regardless of whether it's an email, phone, or web enquiry. Omni-channel routing has delivered a further 20% reduction in the average time it takes an employee to handle an inquiry.



**In our first month using Service Cloud, the average handling time was cut by 25% and there was a 20% decrease in release and deployment times.”**



### Keep it personal

Service is more than just servicing an enquiry. When an agent provides efficient and personalised service, it becomes a revenue driver. For example, say a customer is pausing their health policy because they're going travelling – that agent could offer a great deal on travel insurance instead.

However, personalisation should not come at the cost of an employee's time. We can prioritise efficiency by giving agents all of a customer's information in one place. Automation is a big focus for nib Group – we don't want agents to do anything we can automate, so we've set our sights on automating menial tasks so agents can focus on great service, not admin.

Automation can also bring unexpected benefits. For example, Service Cloud transcribes all voice calls in real time so agents don't need to take notes. And with many of our customers overseas, we're able to complete the transaction in the local language using real-time translation services.

### Katrina Trenkner's advice on building a solid business case:



**There's a difference between getting executive sign-off and getting business engagement. To ensure business adoption, keep the messages simple and consistent."**

### Change starts with great change management

As you begin your transformation process, really focus on the problems you're trying to solve. Having that clarity will help you down the line when you're communicating changes to your employees. We focused on first-contact resolution, creating value through personalisation, and ensuring that our customers never had to repeat themselves.

As these processes are rolled out, get feedback from your teams on what's working and what can be improved, and how any adjustments will contribute to your key business outcomes.



## Pair ROI with a long-term vision

By Brady Jacobsen, General Manager, Digital and Customer Experience at Vocus

*Vocus Group is a leading provider of specialist fibre and network solutions that connect people, businesses, governments, and communities across Australia. Its business has grown significantly with the acquisition of multiple brands, including Dodo, iPrimus M2, NextGen and Commander.*

### Service is a marketing channel

A great way to justify your investment in service is to position it as a marketing channel. Think about it: if you can combine your service offerings with other multi-channel marketing experiences, an interaction with your service team might just be the tipping point that helps you close a sale, or is an opportunity to direct a customer to a new product they may not have heard about otherwise.

That said, the only way your service agents can provide these amazing service interactions is by first having a single view of the customer and knowing their previous interactions so they can accurately suggest useful products or services.

### The art and science of the business case

There's an adage I often think about when working on a business case – to do it well, you need to account for the head, the heart and the guts:

- 1 The head refers to the data
- 2 The heart refers to the vision
- 3 And the guts is the call to action, the secret sauce that will drive your stakeholders and user community to embrace the change

To justify the case for transformation to your execs, try to stitch together these elements. A business case is as much a vision for the future as it is a recognition of value and ROI.



**A business case is as much a vision for the future as it is a recognition of value and ROI.”**

To do this, outline the financial and non-financial benefits of service transformation. On the financial side, you can look at revenue attribution and customer experience uplift, rather than a straight cost-out. On the non-financial side, you could cover improving productivity through automation or the opportunity to simplify your IT stack and sunset legacy systems that are no longer driving your business forward.

During the implementation phase, it's key you hone the vision. You want to get all employees excited about the transformation by showing them how the technology platform will make their lives easier and help them reach their performance and professional goals.

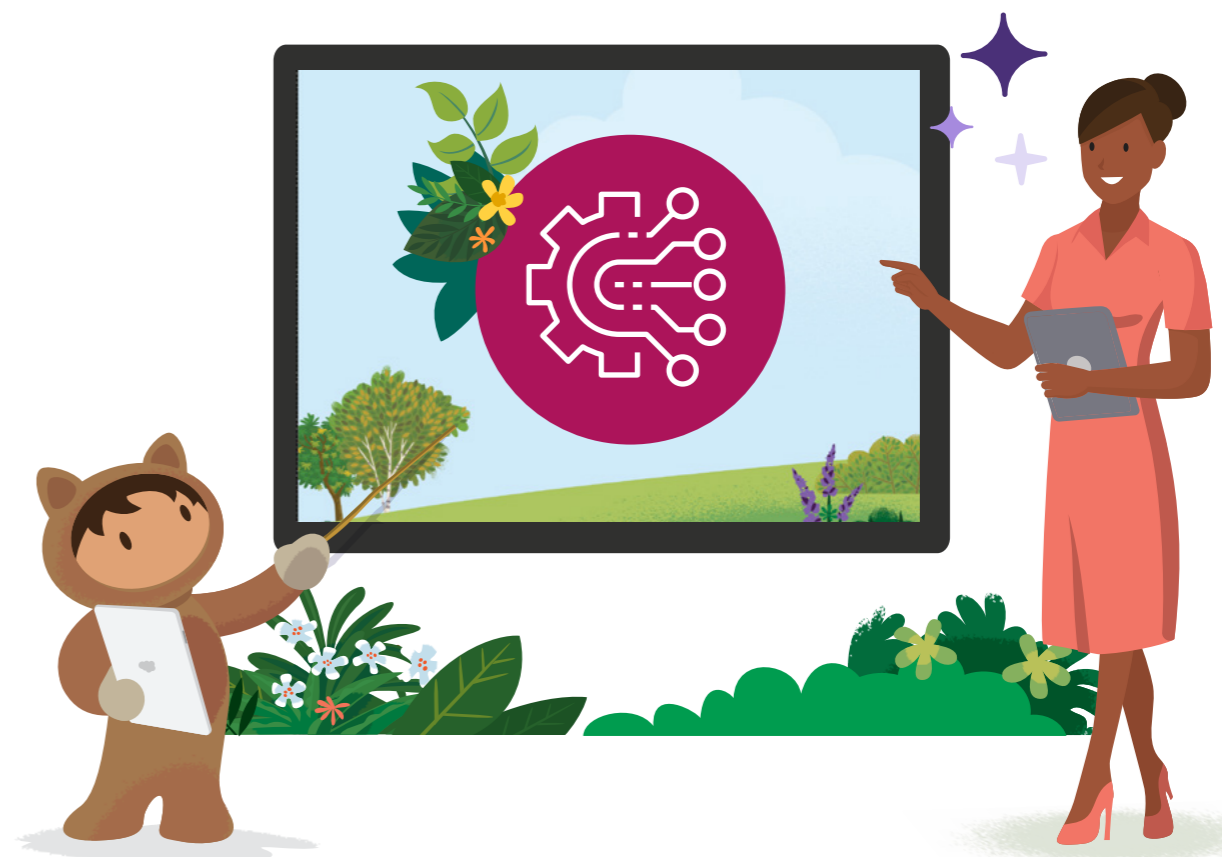
### Success in stages

My recommendation is to take a minimum viable product (MVP) approach. Implementing in stages means you can get value early while making progressive changes that highlight the flexibility of the platform. This will help to build trust with your team as well, as they'll be able to have a say on how to improve the platform and the processes behind it.

**Brady Jacobsen's advice on building a solid business case:**



**If your leaders haven't been through a digital transformation, they might not be motivated to understand what necessary good looks like. If you pitch the dream, it'll be too far away for them to understand. Instead, extrapolate on the current waste within existing processes and then highlight the efficiencies they could gain.”**



### How to get leadership on board

To get your service transformation project across the line, you need a foolproof business case. As you begin your service journey, be clear on your ideal end state. Once you know what you're working toward, think about your main value drivers. Here are some questions you could ask:

- 1 Do I want to save money on labour costs?
- 2 Do I want to make my workforce more efficient?
- 3 Do I want to cut down on travel expenses?
- 4 Do I want to make my back office more efficient?

### Digging deeper

Once you've identified the workflows that need tightening, put it into context by evaluating how much these solutions will save your service operations in the long run. Salesforce's Service Cloud Business Value Calculator will give you insights specific to your business, by helping you quantify:

- 1 Savings in resolution time
- 2 Increased self-service
- 3 Reduced agent admin time
- 4 Reduced agent ramp time
- 4 Improvements in customer satisfaction scores



### Who needs to be involved in building a business case?

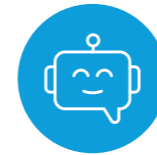
After you've charted the cost savings, you need to convince the people who will make it happen: the decision makers. That's where your comprehensive business case comes in. Bring in expertise from around the business – IT leaders can help you understand the cost of maintaining an existing solution, and finance managers can help you pinpoint cost savings. Your business case will marry these perspectives, chart efficiency and cost savings, and paint a vision for the future.

### What happens next?

Once the business case has been pitched and approved, implementation of the technology can begin. Here are our key tips for an easy rollout.



#### Implementation should be gradual



Help your agents adapt to the new systems and processes. Ask for their feedback on how it can be improved and iterate as you go.

#### Bring your team on the journey



Show employees how the technology platform will make their jobs easier.

#### Invest in change management



Don't impose new systems. Instead, keep agents, employees and other key stakeholders informed and invite feedback.

#### Focus on your agreed goals



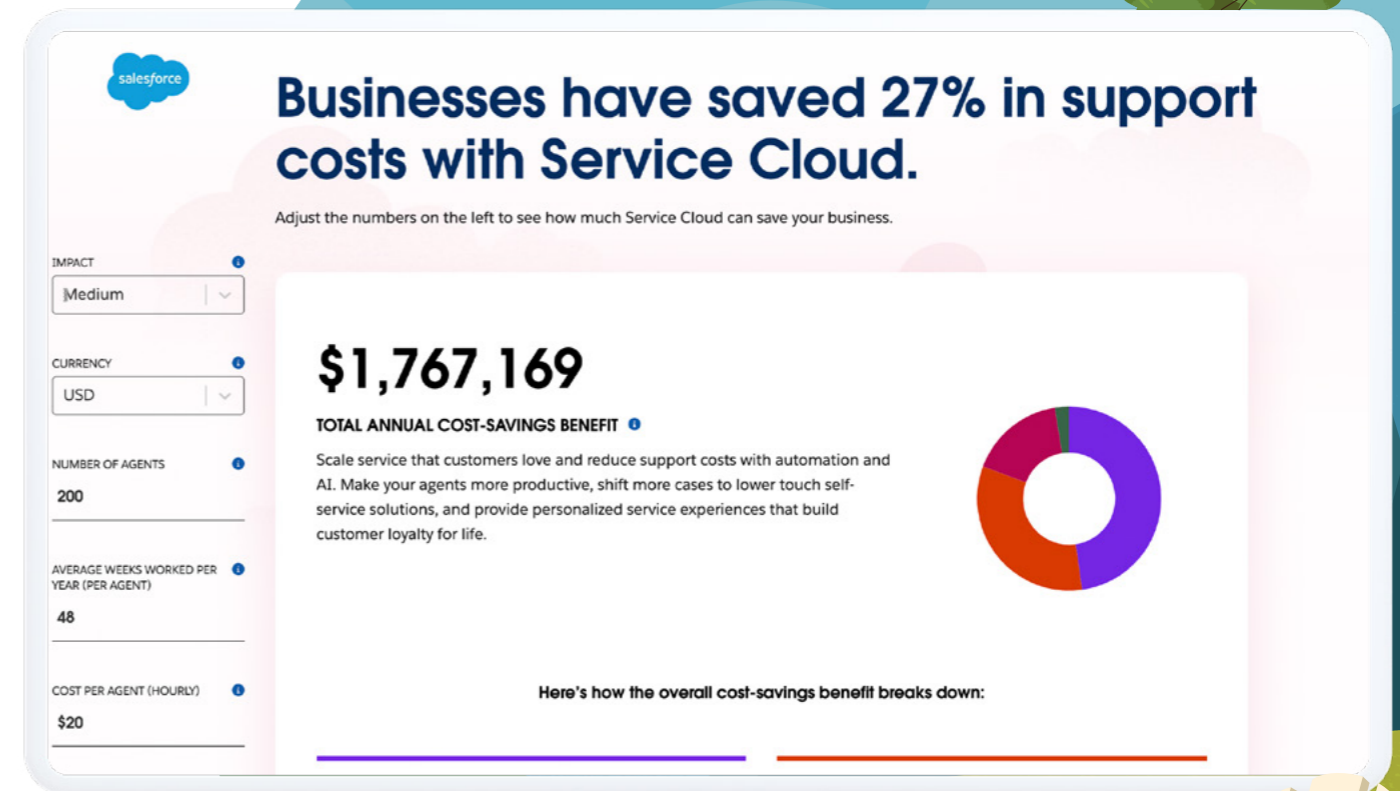
When implementing and optimising, stay focused on your primary objectives and carry them forward.



## The Salesforce Business Value Discovery tool

Building a business case for service is a complex process. You're creating a comprehensive case that assembles all the key information – formulas, proof points, ROI and key value drivers to help you justify the investment. You can't simply arrive at the pitch with a spreadsheet – your business case needs to balance the numbers with the long-term vision.

To help you simplify the process we've introduced a new service called the Salesforce Business Value Discovery (BVD) tool. Using the BVD tool, service leaders can build an accurate and palatable case for service transformation and access the expertise to influence the C-suite.



## Understand your cost-savings benefit, fast

Need help quantifying your KPIs and cost-saving targets? Check out our value calculator to get an estimate of how much value Service Cloud can provide based on your organisation, number of agents, and more.

[Service Cloud Value calculator](#)

Once you've pinpointed just how much Service Cloud will save your business, Salesforce can help you build a comprehensive business case, built with our exclusive Business Value Discovery (BVD) tool.

[Contact Us](#)

1800 667 638 (AU)

