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The Three Customer Service Megatrends In 2020: Fuse AI And Agents To Drive Better Experiences

Vision: The Contact Centers For Customer Service Playbook

by Kate Leggett
January 14, 2020 | Updated: March 19, 2020

Why Read This Report

Automation and AI continue their march into customer service operations, and enterprises reap the rewards. Operations become more efficient, and enterprises deliver differentiated experiences, uncover new revenue streams, and reinvent business models. Automation and AI also transform the workforce: Agents work faster and smarter and are more satisfied. This report reveals the top three customer service trends that customer service leaders must pay attention to in 2020.

Key Takeaways

Automation And AI Serve As The Foundations For Customer Service
These technologies autonomously interact with customers and take over repetitive agent tasks. Organizations must meld them into every aspect of customer service operations. They must assess the breadth of available AI and automation technologies and their real impact on operations.

Your Organization Needs Superagents, And They Need AI
Automation and AI take over reproducible work, and agents focus on exceptions and escalations. There are fewer moments of human connection. AI must help superagents better understand and support customers and guide them to optimal outcomes. Organizations must invest in communicating the value of — and charting career paths for — agents supported by AI.

Customer Service Organizations Must Rethink Culture
Upskilled and empowered superagents demand autonomy and purpose. Organizations must rethink their staffing practices, measures of success, and cultures to best support the new workforce.

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by Kate Leggett
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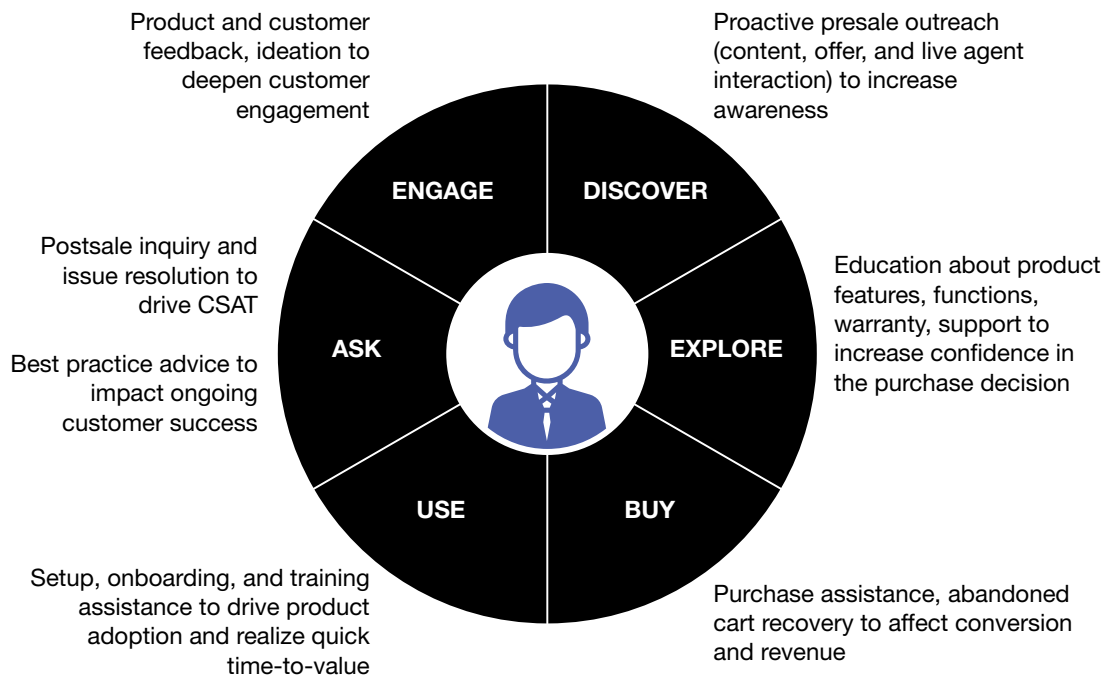+1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com

Poor Customer Service Costs Businesses Tens Of Billions In Revenue

Connected customers compare your customer service experiences not just with your competitors but also with the best experiences that they've had with consumer brands. They broadcast poor experiences in the moment, over a growing set of digital and social channels, leading to abandoned purchases, lost sales, and brand erosion.[1] However, great service motivates them to return to a retailer that they've purchased from before.[2] Companies are cognizant of the economics of good pre- and postpurchase support (see Figure 1). Purchase influencers report that increasing the quality of their online customer experiences is their top customer experience priority this year (see Figure 2).

Doing so will take a reimagination of your current strategy and the way you measure success — on the customer's terms, not yours. It takes a long-term investment in AI and automation to better support your customers and your agents and the process changes that ensue after investments in these newer technologies. Forrester sees three megatrends for 2020 that customer service leaders must consider as they transform their operations (see Figure 3).

FIGURE 1 Customer Service Activities Span The Customer's Journey

Customer service activities span the customer's journey

Product and customer feedback, ideation to deepen customer engagement

Proactive presale outreach (content, offer, and live agent interaction) to increase awareness

Postsale inquiry and issue resolution to drive CSAT

Education about product features, functions, warranty, support to increase confidence in the purchase decision

Best practice advice to impact ongoing customer success

Setup, onboarding, and training assistance to drive product adoption and realize quick time-to-value

Purchase assistance, abandoned cart recovery to affect conversion and revenue

ENGAGE   DISCOVER   ASK   EXPLORE   USE   BUY

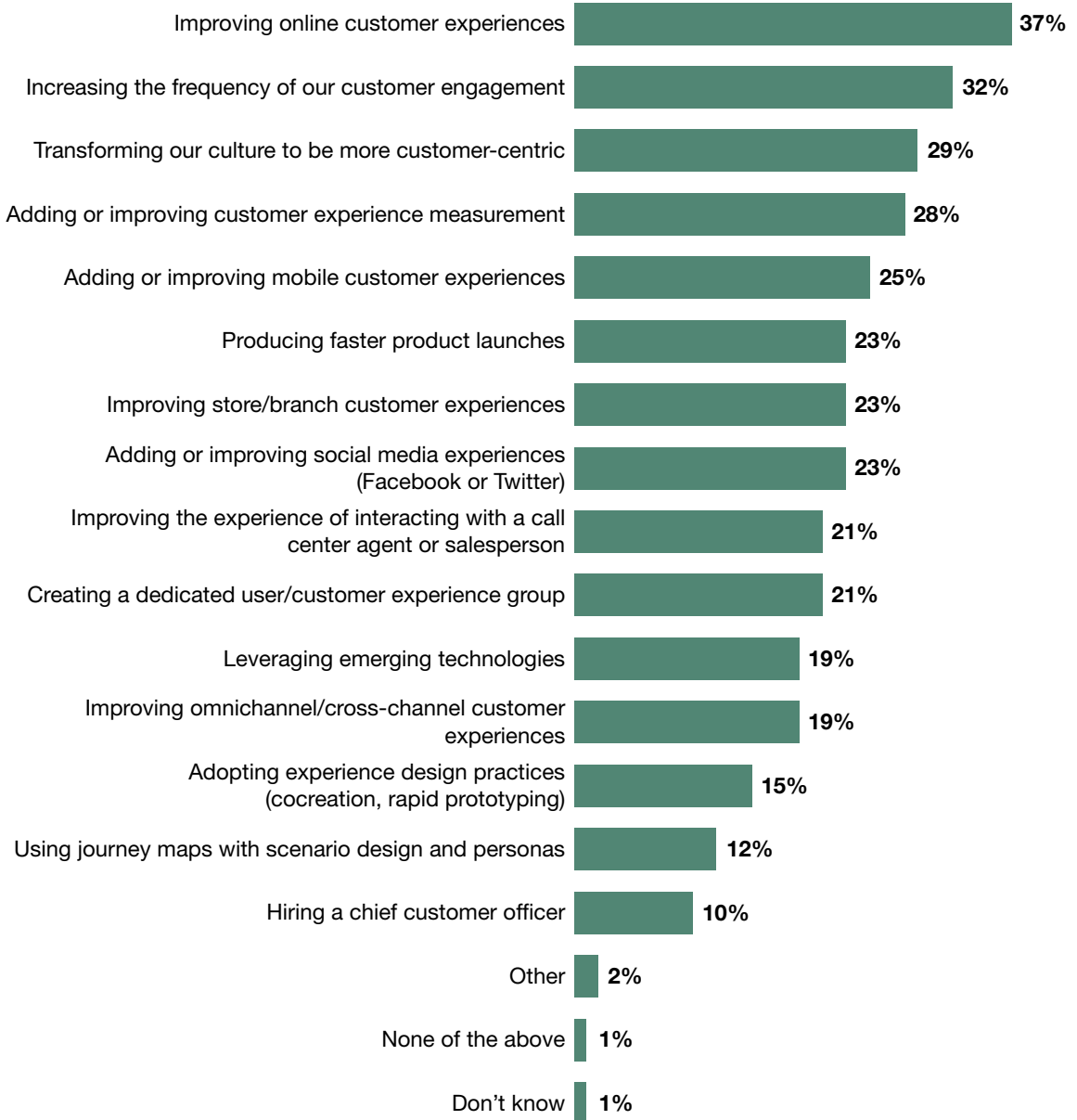FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

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FIGURE 2 Improving Online Customer Experiences Is The Top Customer Experience Business Priority For 2020

"What are the key actions that your firm is taking to achieve your objective of improving the experience of your customers?"

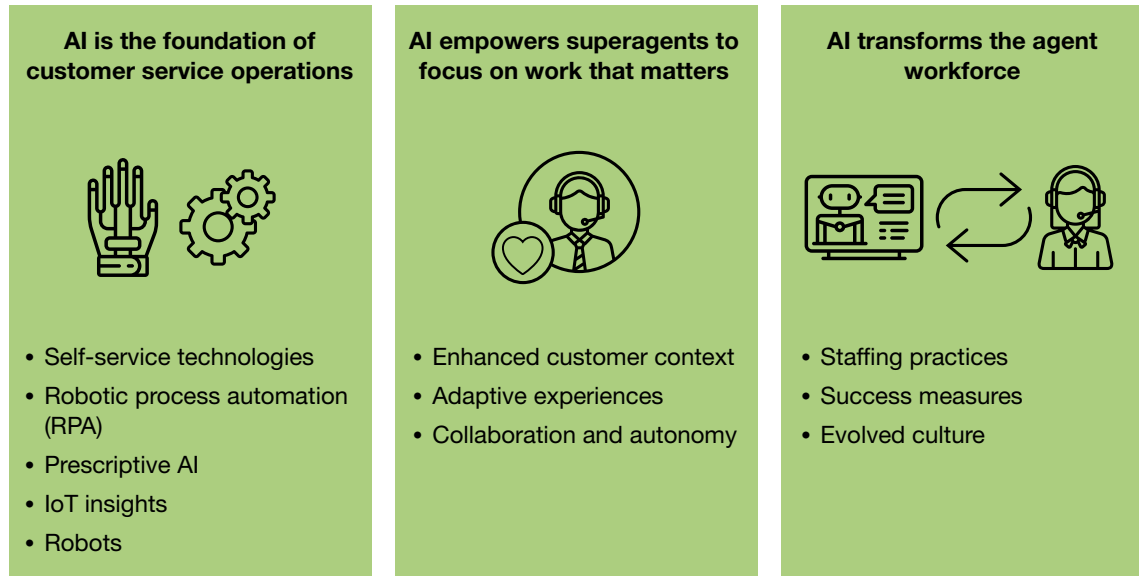| Action	Percentage
Improving online customer experiences	37%
Increasing the frequency of our customer engagement	32%
Transforming our culture to be more customer-centric	29%
Adding or improving customer experience measurement	28%
Adding or improving mobile customer experiences	25%
Producing faster product launches	23%
Improving store/branch customer experiences	23%
Adding or improving social media experiences (Facebook or Twitter)	23%
Improving the experience of interacting with a call center agent or salesperson	21%
Creating a dedicated user/customer experience group	21%
Leveraging emerging technologies	19%
Improving omnichannel/cross-channel customer experiences	19%
Adopting experience design practices (cocreation, rapid prototyping)	15%
Using journey maps with scenario design and personas	12%
Hiring a chief customer officer	10%
Other	2%
None of the above	1%
Don't know	1%

Base: 2,234 purchase influencers (past 12 months/next 12 months) who indicate that improving the experience of their customers is a priority for their company
Source: Forrester Analytics Global Business Technographics® Priorities And Journey Survey, 2019

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FIGURE 3 The Three Customer Service Megatrends For 2020

AI is the foundation of customer service operations	AI empowers superagents to focus on work that matters	AI transforms the agent workforce
• Self-service technologies • Robotic process automation (RPA) • Prescriptive AI • IoT insights • Robots	• Enhanced customer context • Adaptive experiences • Collaboration and autonomy	• Staffing practices • Success measures • Evolved culture

1. Agents Will No Longer Be Essential To Scale Customer Service

Automation and AI are foundational technologies critical to any company that wants to remain competitive. They will take over repetitive agent tasks and autonomously interact with customers, allowing agents to handle complex interactions that require empathy and personalization. They will enable agents to onboard faster, perform at their best every day, and accelerate their career paths. They will empower supervisors to better staff and manage their workforce. And they allow companies to roll out products faster and to manage the ballooning volumes of digital interactions over a growing range of channels without increasing agent headcount.

To realize the full power of automation and AI, customer service organizations must adopt:

› **Self-service technologies to facilitate agent-assisted interactions.** Interactions should start with understanding the customer's request which then invokes intent-based actions: knowledgebase searches, process steps, or nondeterministic dialogues. An orchestration bot coordinates handoff between different actions, and machine learning improves outcomes.[3] A mobile gaming company deflects 90% of its incoming contacts using self-service.[4] Qapital, a personal finance app, resolves 25,000 issues a month; less than half require agent support.[5]

In 2020, self-service will be the gatekeeper to all channels, automating tasks to increase the speed of resolution, CSAT, conversion, and revenue.[6] Contact centers will continue to invest in — and rationalize — diverse self-service technologies: knowledge management for curated

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content; communities for peer-generated content; cognitive search to extend discovery beyond a knowledge base; chatbots to automate dialogues; and decisioning engines to insert rules and logic to help guide customers to the right outcome.

› **Robotic process automation (RPA) to improve the bottom line.** RPA provides a tactical fix to digitize common agent tasks. Attended RPA bots target the front office. Agents invoke them, in the flow of their work, improving productivity and quality. Unattended RPA bots autonomously execute tasks from a work queue.[7] Agents use both types of RPA. Agent work is aided by attended RPA, which can kick off unattended RPA to complete the process. A large bank saved $600,000 in annual employee time. It also reduced customer wait times.[8]

In 2020, RPA will continue its march into the contact center: 45% of data and analytics decision makers whose firm is adopting automation already use RPA.[9] This is because the ROI is easy to calculate: An RPA bot for high-volume, low-complexity tasks can replace three or four agents. However, for more complex work, savings are lower. RPA also has hidden benefits: It enables agent upskilling and makes workplaces more attractive.[10] Yet, in many cases, RPA plugs gaps in legacy systems and delays efforts to overhaul systems.[11]

› **Prescriptive AI to make customer service more efficient and effective.** AI streamlines inquiry capture and resolution; optimizes case routing, classification, and schedule management; and extracts useful information to monitor the quality of service delivered. Insights help coach agents and surface product and process trends and customer sentiment that impact customer retention and loyalty, tactics that both Vivint and SiriusXM use.[12]

In 2020, companies will continue to use AI to make operations more efficient and agents more productive. But AI can do much more: It will help monitor customer journeys and proactively engage customers at the right time to drive conversion. AI-fueled onboarding activities such as customer activation and customer health tracking will deepen customer relationships. AI-fueled postpurchase support will schedule maintenance appointments, optimize agent actions to drive best outcomes, push fixes to connected devices, restock parts based on need, or intelligently optimize field resources to provide on-demand service.

IoT And Physical Robots Deliver Unique Experiences But Are Not Needed By All

Customer service leaders look to better understand their customers and the products they use. They experiment with emerging technologies to gain these insights and to free frontline workers from repetitive, low-value work so they can concentrate on tasks of greater value to the company. Two technologies of interest are:

› **Internet-of-things (IoT) insights to enhance and extend business models.** Companies with products in the physical world must monitor their status — otherwise, they rely on customer complaints when equipment breaks. Many companies use IoT for intelligent customer service,

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which includes preemptive diagnosis and issue resolution.[13] For example, connected iRobots self-register and order new parts when they fail.[14] Marriott International hotels proactively adjust room experiences based on customer preferences.[15]

In 2020, IoT will continue to add value as companies digitally transform. QR codes connect assets to customers and deliver insights about their use and performance. Proactive monitoring also allows companies to transform business models from being products based to subscription based. Michelin offers tire services by the kilometer to European trucking companies.[16] To make the business model of IoT work, companies must invest in IoT platforms connected to contact center solutions and act on the triggers they receive.[17]

› **Customer service robots to deliver real value in expanding niches.** Physical robots perform repetitive tasks ranging from helping field workers and retailers deliver better experiences to taking over dangerous and undesirable customer service functions. For example, Best Buy's customer-facing robot is a yellow arm that fulfills orders for more than 15,000 products. Hotel robots deliver amenities, luggage, and act as concierge services.[18]

In 2020, companies will begin to map broader uses for robots that impact lower-skilled employment against a five-year time frame. Companies already report efficiencies when using logistics robots that move equipment and supplies in hospitals, high-rises, and hotels as well as insurance drones that take GPS-tagged images of damages, speeding up claims processing and reducing fraud. Yet, robots are expensive, and broader uses in customer service aren't fully thought out.[19]

2. Agent Desktops Modernize To Handle Complex Issues

As self-service and automation increasingly handles repetitive work, agent interactions become escalation points for more complex issues like claims disputes or product errors that require diagnosis. These inquiries take longer to resolve and require skilled agent resources to solve the issue and temper customer frustration. Emotionally resonant superagents emerge to solve complex issues. They are subject matter experts and are better compensated and may even have revenue goals. These superagents also become brand ambassadors who provide differentiated experiences.

AI-infused agent desktop technologies become more critical to optimize the outcomes of these rare human moments to connect with customers and nurture relationships. This type of agent work is also more rewarding and offers agents a real sense of purpose, which resonates with the growth of Millennials and Gen Z in the workplace. Both behaviors translate to agent and customer retention and, ultimately, revenue. Customer service leaders must make these human moments matter. They must empower agents with:

› **Enhanced customer context for true 1:1 engagement.** AI-powered agent desktops must help agents to understand the customer, their value to their organization, their product usage journey, their current health, and how their health trends over time. Core CRM details must be enhanced

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with customer context — attributes such as journey information, conversational style, buying indicators, life events, and relationship graphs.[20] This drives more personal agent interactions as well as actions that agent desktops recommend to agents.

In 2020, companies will continue to empower agents with more customer knowledge. They will start to expose customer details to all employees working on customer issues such as in an effort to better organize around the customer. They will empower agents to seamlessly move between channels during interactions, preserving context and content to deliver personal, effective experiences. They will also explore customer visualizations and avatars, such as what Gucci and Neiman Marcus use to better understand their customer.[21]

› **Adaptive agent desktops that facilitate agent work.** Customer service organizations must reduce the cognitive load of agent desktops. Current options include scripts; tip balloons present step-by-step instructions and unified agent desktops. Agent-facing bots also automate routine work, clarify intent, surface data, and provide insights at the right time.

In 2020, superagents will become real. Computer vision, for example, will identify assets and analyze meaningful data for troubleshooting. Cognitive solutions will search through data sets to identify best resolutions. Mixed reality will guide field workers through complex work. Only 11% of global information workers say they aren't open to training AI systems.[22] CSAT is also higher when bots and agents work together.[23] Yet as only 19% of global information workers say their company does a good job at articulating the mission of AI in the workplace and only 18% say their company considers how automation will affect the employee experience, firms have a long way to go to career path employees in an AI-first world.[24]

› **Workspaces that facilitate collaboration and knowledge.** Superagents work on more complex issues such as product exceptions or previously unknown product defects. They must often collaborate with back-office workers, engineers, or product experts. They must be upskilled to keep up with new product introductions or emerging issues. Accurate and complete resolution become more important than handle times and speed of answer.

In 2020, agent desktops will embed collaborative zones to facilitate expert resources swarming around an issue. Speech and text analytics will monitor and score customer interactions. Quality scores will drive just-in-time coaching on a specific subject. Companies will also relax efficiency-focused workforce management practices to give agents more autonomy. Case in point is Shopify, which only tracks quality of service metrics.[25] However, this approach must be pragmatically balanced to the need to staff according to incoming work volumes and monitor them to ensure performance and customer satisfaction.

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3. Agent Staffing And Culture Transform As AI Sets In

As customer service organizations adopt AI and automation, the nature of work changes. They erode the need for lower-tier agents and increase the need for superagents. They also create new jobs such as bot masters and conversational designers. These jobs are better compensated than traditional agent work, and workers have longer tenure. This lets companies take time to hire for the culture it wants.

AI and automation also force traditional contact centers to rethink standard operating procedures. For example, contact centers must rethink:

› **Staffing practices to better align with evolving expectations for work.** Millennials (ages 25 to 39) now surpass Gen X (ages 40 to 54) as the largest generation in the workforce, with Gen Z (ages 19 to 24) just entering the workforce.[26] Generational differences are real, and the younger agent talent pool has new expectations for work. They value authenticity, and a work-life balance. They seek collaboration and technology to make them more productive. They want their work to make an impact — on the customer and their company.

  In 2020, contact centers will start to leverage the unique skills that these generations offer. They will seek out digital natives who are adept at context switching between interactions to support digital channels; lifestyle workers who bring unique skills to the workplace and prefer gig economy or work at home work models; or brand advocates who can have authentic conversations with customers as interactions become more consultative. For example, Pier 1 hires agents with design degrees or who are passionate about home decorating.

› **Measuring success to better track customer engagement and retention.** Contact center metrics include a mix of cost, satisfaction, revenue, and compliance measures. As AI and automation penetrate the contact center, they optimize cost and compliance structures, allowing organization to focus on quality of service and revenue activities. For example, after automating customer interactions, Air Asia found that its agents sold ancillary products such as insurance and seat selection eight times more compared to 12 months prior.[27]

  In 2020, customer service organizations will orient toward using customer value metrics. They will track not only customer satisfaction for each agent interaction, but customer engagement with, for example, self-service content, or a peer community. Better engagement correlates to customer loyalty measures that are indicative of customer retention, enrichment, and advocacy. Increasing these measures impacts topline revenue and helps elevate contact centers to a much more strategic role within companies.

› **Reshaping culture to better emotionally support agents.** AI and automation allow organizations to quickly onboard and up-level agents, turning them into highly effective superagents. One benefit is that, over time, these technologies reduce the speed at which companies hire for growth. Managers oversee smaller teams staffed with better skilled, more effective, and more satisfied agents. Managers focus on nurturing their workforces, ultimately reducing churn and making their workplaces more attractive to new hires.

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In 2020, organizations will start to realize the upside of AI as measured by increased agent retention. Yet, they will feel the burden of empathy burnout. Managers will experiment with longer breaks and scheduled offline work. They will also seek technology solutions such as behavioral analytics to match a caller's psychographic profile to the best-skilled agent to serve that personality type; speech analytics to route calls to supervisors when they sense customer frustration; and behavioral guidance to provide live speaking feedback to agents.

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Supplemental Material

Survey Methodology

The Forrester Analytics Global Business Technographics® Priorities And Journey Survey, 2019, was fielded between January and March 2019. This online survey included 21,047 respondents in Australia, Canada, China, France, Germany, India, the UK, and the US from companies with two or more employees.

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Forrester Analytics' Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester's Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

[1] Source: Shep Hyken, "Businesses Lose $75 Billion Due To Poor Customer Service," Forbes, May 17, 2018 (https://www.forbes.com/sites/shephyken/2018/05/17/businesses-lose-75-billion-due-to-poor-customer-service/#30c2e15816f9).

Companies with poor customer service push customers away and motivate them to take their business elsewhere. For example, 62% of US consumers have stopped doing business with a brand due to poor customer service. Source: "State of global customer service report," Microsoft, March 2, 2019 (http://info.microsoft.com/rs/157-GQE-382/images/EN-US-CNTNT-ebook-2018-State-of-Global-Customer-Service.pdf).

See the Forrester report "Elevate Your Customer Experience With End-To-End Customer Service."

[2] When we asked 4,818 US online adults what motivates them to use a retailer that they have purchased products from before, 38% said, "The retailer offers good customer service." Source: Forrester Analytics Consumer Technographics North American Retail And Travel Topic Insights 2 Survey, 2019.

[3] Some self-service experiences are simple question-and-answer scenarios where the customer is searching for a single answer to their question. Others encompass simple processes, such as a merchandise return, which leads the customer through authentication and customer and order lookup to the return. Others require discovery to help clarify customer intent and recommend the right next step, or they lead the customer through a complex troubleshooting sequence where the next step is dependent on the customer's answer.

[4] A mobile gaming company that receives more than 550,000 customer inquiries daily deflects 90% of those inquiries with self-service. Of the remaining inquiries that start a conversation, 70% are handled by automated chatbots, while the remaining 30% are handled by a combination of agents and automated chatbots. Source: Helpshift (https://www.helpshift.com) and Ajit Ghuman, "Chatbots for Customer Service: Why You Need to Rethink Your Strategy," Helpshift blog, May 8, 2019 (https://www.helpshift.com/blog/chatbots-for-customer-service-new-approach/).

[5] Qapital uses a chatbot from ada.support.

[6] Source: "2019 Global Customer Experience Benchmarking Report," Dimension Data (https://www.dimensiondata.com/en/insights/customer-experience-benchmarking-report-2019).

[7] Forrester defines attended RPA as: automation that interacts in real time with humans who initiate and control robot tasks; often embeds functions within apps; and associates with front-office, agent-led activities. Forrester defines unattended RPA as: automation that replaces a complete human function in a lights-out, batch-oriented manner; creates a virtual workforce; and, generally, associates with back-office activities. For more information, see the Forrester report "Attended-Mode RPA: The Differences You Need To Know."

[8] See the Forrester report "Attended-Mode RPA: The Differences You Need To Know."

[9] Source: Forrester Analytics Global Business Technographics Data And Analytics Survey, 2019.

[10] See the Forrester report "Use RPA To Deliver Better Customer Service Experiences."

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[11] See the Forrester report "RPA Operating Models Should Be Light And Federated."

[12] Source: "SiriusXM Customer Success Story," CallMiner Learning Portal (https://learn.callminer.com/case-studies/sirius-xm) and "Zeroing in on Ideal Coaching Moments with Speech Analytics featuring Vivint," CallMiner Learning Portal (https://learn.callminer.com/case-studies/webinar-2018-06-zeroing-in-on-ideal-coaching-moments).

[13] For more information, see the Forrester report "Internet-Of-Things Heat Maps For Operational Excellence, 2019."

[14] Source: "Improve Customer Satisfaction and Retention; Maximize Efficiency," Oracle (http://www.oracle.com/us/products/applications/customer-successes-ebook-1956610.pdf).

[15] Source: "Schneider Electric Innovation Summit Paris 2018," Schneider Electric, 2018 (https://download.schneider-electric.com/files?p_enDocType=Brochure&p_File_Name=Schneider+Electric+CNBC+Catalyst+Paris+report.pdf&p_Doc_Ref=CNBC_report).

[16] Source: Anya Khalamayzer, "7 companies advancing the circular economy by selling products as a service," GreenBiz, February 15, 2018 (https://www.greenbiz.com/article/7-companies-offering-circular-economy-service).

[17] The IoT trend features a common idea of network-connected digital sensors and actuators but lacks any core common technology or a universal killer app. AD&D professionals are faced with a wide range of technologies they can use to deploy specific end-to-end use cases plus many industry-specific technologies. See the Forrester report "Brief: Bringing Interoperability To The Internet Of Things" and see the Forrester report "TechRadar™: Internet Of Things, Q1 2016."

[18] For more information, see the Forrester report "The Rise Of Customer Service Robots."

[19] Source: "Pepper," SoftBank Robotics (https://www.softbankrobotics.com/emea/en/pepper).

[20] Examples of relationship graphs include household relationships; organizational hierarchies; and influencer relationships.

[21] Source: "Customer Success Stories," Powerfront (https://www.powerfront.com/case-studies/en-us/).

[22] When we asked whether they were open to the task of training software systems that they use at work, 11% disagreed, 33% of global information workers agreed, and 56% were neutral. Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2019.

[23] Issues that agents and bots worked on together resulted in the highest CSAT at 4.40 (out of 5) when averaged across 6 months. This is 7% higher than the average CSAT across all messaging issues, and 1% higher average CSAT than tickets that did not invoke a bot. Source: "State of Customer Service Automation 2019," Helpshift, 2019 (https://go.helpshift.com/rs/113-UDX-599/images/Report_State_of_CS_Automation.pdf).

[24] Only 19% of global information workers say that their company does a good job at articulating the mission of AI in the workplace; just 18% say that their company has shown concern for how implementation of automation technologies may affect their overall employee experience. Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2019.

[25] Marcie Murray, director of support at Shopify, said that her organization focuses exclusively on quality. "It's the only metric that is directly attributable to a particular agent. We want to measure how the agent showed up for the call and whether they took a consultative approach in helping the customer out." See the Forrester report "The Future Of Work: You Must Change How You Hire Customer Service Agents."

[26] For more information, see the Forrester report "Improving CX Through Business Discipline Drives Growth."

For more information, see the Forrester report "Millennial B2B Buyers Come Of Age."

[27] Source: Ayisy Yusof, "AirAsia unveils AVA for seamless passenger travelling experience," New Straits Times, August 26, 2019 (https://www.nst.com.my/business/2019/08/516160/airasia-unveils-ava-seamless-passenger-travelling-experience).

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