

Guide

How to Create a Customer Service Funnel

Building a state-of-the-art customer service strategy with automation and human touch



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Preface

Everyone is talking about customer service these days. It's such a popular topic and there's so much buzz that suddenly, "everyone's an expert". There's a new tool and a new "omni-channel approach" announced every month. So why should you listen to us?

Looking back, for many of us who have worked "in the trenches" of customer service before, processing ticket queues and manning the phones, we have sometimes had the feeling that hardly anyone was on our side. In the organizational hierarchy, customer service reps are often the last ones to be allocated funds for projects, training and development—and often the first ones to be affected by any belt tightening measures.

But more recently, a lot of things have changed for the better. We're witnessing the evolution of customer service from an "afterthought" to an indispensable strategic tool.

Countless companies have realized that customer service teams are hidden everyday heroes. If someone in production or shipping makes a mistake, who will take the heat and rescue the customer relationship? When the company Christmas party is in full swing, which team will still be working? Executives are also waking up to the fact that customer service representatives play a key strategic role when it comes to generating revenue and increasing customer lifetime value (CLV).

We wrote this guide because we want to create a framework for service managers that will genuinely help customer service teams in the long term and, of course, their customers. Many service teams continue to struggle with the same issues we used to face as a service agent—and many businesses are still trying to improve their customer service by adding more and more technologies and channels into the mix. We believe all these problems can be solved by taking a more strategic approach to customer service.

We've developed a "customer service funnel" framework that is based on hundreds of discussions with business executives and service leaders. They have all struggled with very similar problems: unsatisfied and frustrated customers, increasing costs and complexity, service activities and channels in silos, underperforming self-service channels, and general misalignment between activities and goals.

It's high time the customer service department got the strategic support it deserves—and this framework will show you exactly how to do it. When you incorporate the customer service department into your company's overall strategy, everybody wins.

Key Takeaways



When you make customer service part of your business strategy, you can turn your service experience into a major selling point that will differentiate you from the competition.



An excellent service experience will not only solve your customers' problems faster—it can also increase customer satisfaction, reduce churn, increase customer loyalty and sales.



All channels are not created equal: If applied wrong, omnichannel service tends to lower efficiency and increase contact volumes. Take back control with a service funnel strategy.



Managing your contact channels effectively is far more important than having as many channels as possible.



A service funnel is a clear strategy that determines how different types of customer contacts are handled and how they are escalated within the service department.



Creating a funnel involves:

- a) defining the criteria for evaluating contacts
- b) identifying and categorizing the most common contact reasons
- c) deciding how those categories are treated as they flow through the funnel

1

Introduction

Traditionally, customer service was seen as a functional cog within a company's machinery. This view has been steadily changing over the past years. Far from mere "cost centers", customer service departments are becoming the new drivers of revenue: both through upselling and cross-selling, but also by building customer relationships, strengthening brand loyalty, and increasing customer satisfaction scores.

Another major change in the business landscape has been the shift towards "experiences". The customer experience has become a focal point across industries, with every sector defining what "experience" means to them as a part of their customer journey.

Even though "experience" sounds a bit vague, there is *real business value to be gained through focusing on experiences*. It has been long known that *business and selling* is all about *emotions*, but it seems like this lesson has only been effectively put into practice in recent years. There isn't a company out there that doesn't consider a positive customer experience to be part of their business strategy.

In reality, however, lots of companies struggle to create these positive experiences. The underlying reason is often misalignment between departments and teams, or the lack of an accurate overview of the interactions with their customers. Consumers view companies as individual brands: discrete entities which they interact with, *not a series of touch points*. They certainly don't think about sales, fulfilment and customer service as separate teams with different responsibilities—and it can be detrimental for business executives to regard their customer experience in this way.

1.1

Making Customer Service Part of Your Business Strategy

As overall *brand loyalty has been decreasing*, competition in virtually every industry has drastically increased. The world has become “a global village”, or a global marketplace, where consumers have endless choices and switching costs are low. *A growing number of consumers have become “serial switchers”*, continually changing between different products, suppliers and brands. As *digitalisation continues to lower operating costs in many industries*, companies *desperately compete for customers’ attention*—and money—particularly in saturated markets.

To manage these new phenomena and fight the continuous churn, companies have had to find new ways of improving their customer experience and outpacing the competition.

In addition, many companies are finding it increasingly hard to differentiate themselves solely on the basis of their product(s). As a result, businesses are starting to focus more heavily on their *customer service departments*. Great support is no longer just an essential part of the customer journey and experience, it *has become a major selling point across industries*.



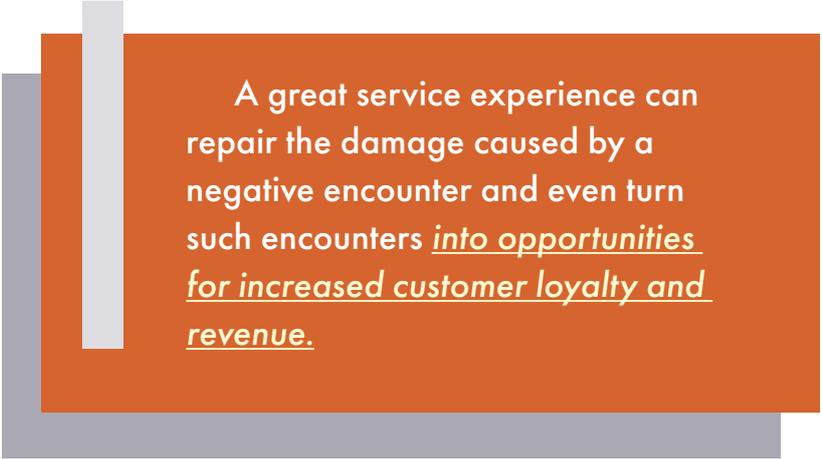
Customer service has become the strategic tool du jour, because it has a significant impact on a variety of key business metrics such as churn, revenue and customer lifetime value—to name just a few.

1.2

“Service Experience” Is a Growing Trend

Customer experience has been a hot topic across industries for years now—and for good reason. It has been proven to contribute massively to the bottom line and overall customer satisfaction. According to a [2015 Forrester study](#), “clients who had a good experience invested 4.5 times more than those who said they had a poor experience”. [A study published by SAP in 2018](#) also found that the key to satisfied customers is as simple as “creating a positive experience” for them. These positive experiences have typically been shaped by great website design, user-friendly interfaces, simple shopping carts and check-out procedures, discounts and so on. In other words, measures that are largely determined by the sales and marketing teams.

While the overall customer experience is a large, company-wide initiative with dozens of stakeholders, defining the service experience is increasingly the responsibility of the customer service managers. And it’s a powerful tool: the service experience alone [can define the Customer Lifetime Value \(CLV\) and set the tone for the overall customer relationship](#).



A great service experience can repair the damage caused by a negative encounter and even turn such encounters into opportunities for increased customer loyalty and revenue.

For a long time, most customer experience efforts focused on pre-sales activities and were undertaken by the sales and marketing departments, i.e. the parts of the company *traditionally associated with the generation of revenue*. But in the last few years, this has changed. Brands are now making sure the customer experience doesn't fall flat after a purchase has been made. How? By creating elaborate customer service strategies that deliver stellar service experiences and support their overall business goals.

In the following chapters, we will take a deep dive into today's customer service experience, outline the challenges and shortcomings of a traditional omnichannel strategy approach with no clear prioritization, and discuss how service managers should apply customer service strategies moving forward.

Setting the Scene:

Customer Service Today

2

One Brand, Many Silos

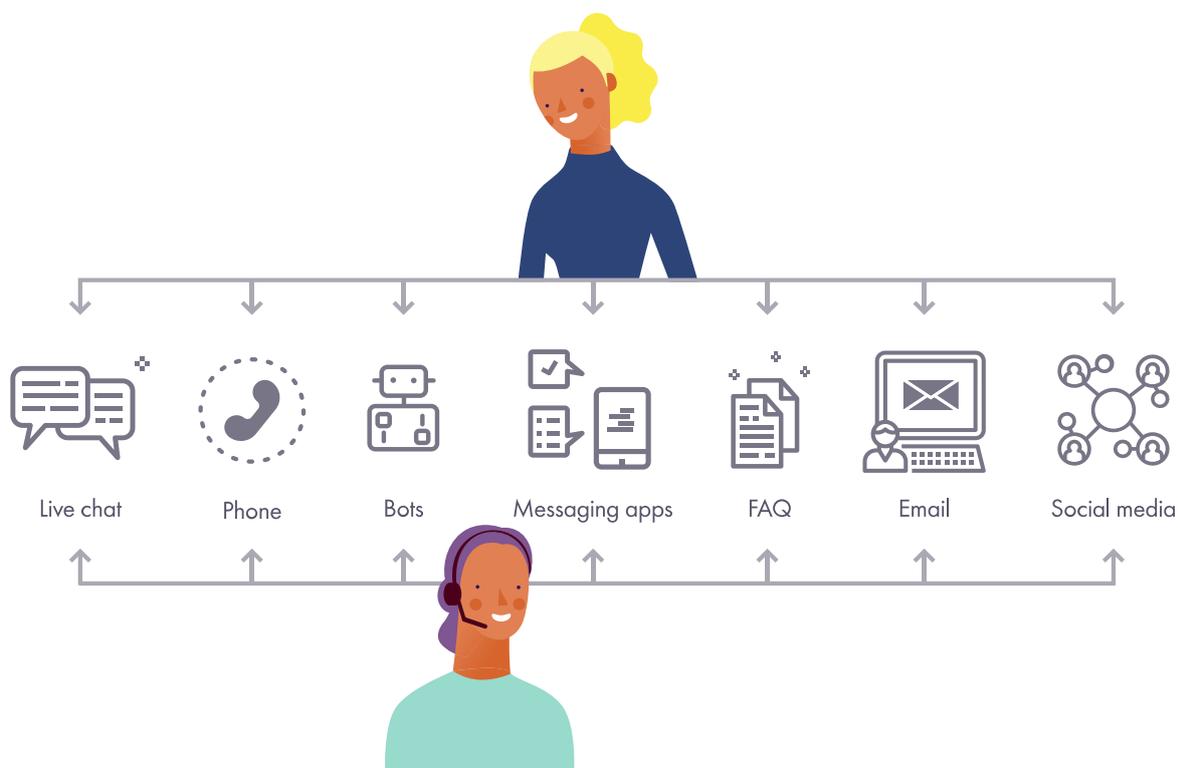
In an attempt to deliver a more coherent customer journey, many brands have taken an omnichannel approach to their sales, marketing and service strategies. The results have been mixed. In some cases, these strategies have caused *customers to feel more neglected than ever*. This has been particularly evident in relation to customer service and after-sales interactions. Misalignment between departments and poor execution has led to customers experiencing a mismatch between the often amazing effort put into marketing and sales and the comparatively weak effort put into customer service.

The challenges of dispersed and misaligned customer interactions have been part of customer service for decades. Customers have always been passed around from agent to agent. As long as call centers and ticketing systems have existed, customer service departments have tried to aggregate the conversations and interactions to provide a better service experience, faster resolution times and to reduce the number of support tickets.

3

The Pitfalls of Omnichannel Customer Service

“Omnichannel” entered the business lexicon in around 2005 and quickly gained a lot of momentum in customer service. As an approach to customer service strategy, it promised to finally keep everything in sync, ensure a seamless experience across all channels and allow customers to “get in touch” with companies in the way that they found most convenient and comfortable.

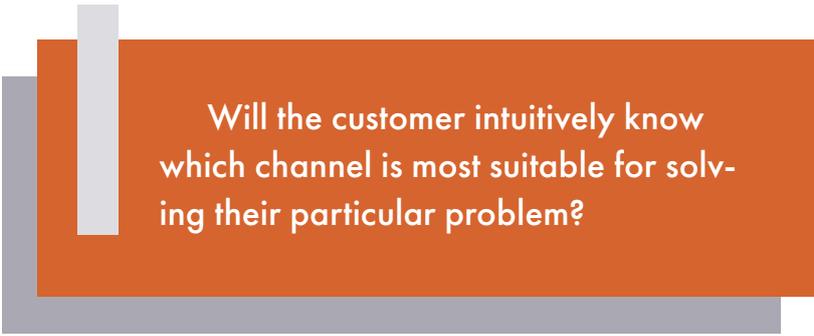


As an idea, omnichannel service feels intuitive, but the reality has not been so rosy. Almost two decades after the approach first gained popularity, the customer service landscape at many companies can still only be described with one word: messy.

There is often a plethora of contact channels, technologies and tools in use—frequently with no clear prioritization. In the worst case scenario, different departments within the company are responsible for different channels, without any kind of integration between them. In 2016, [ContactBabel and Jacada’s US Contact Center Decision-Makers’ Guide](#) found that customer service provided via social media was often handled by marketing or communications teams, self-service channels were managed by the IT department while the contact center took care of inbound calls and emails.

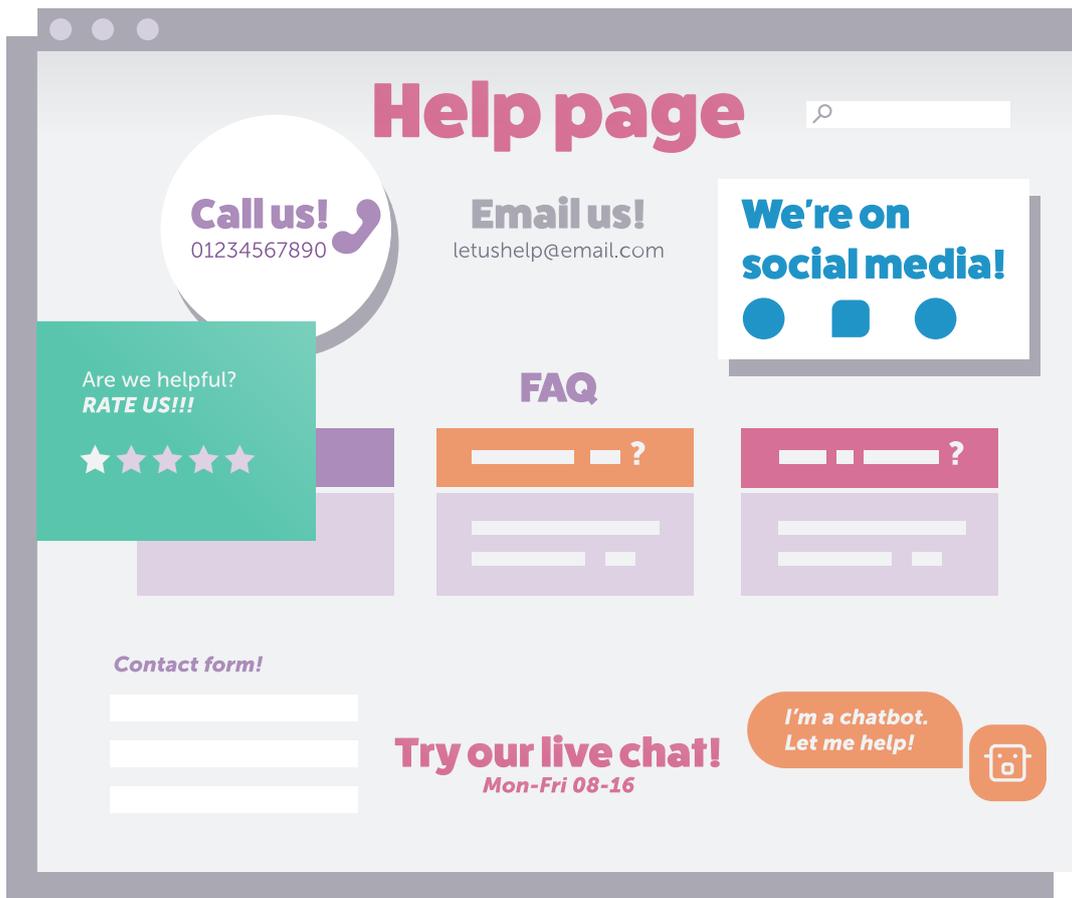
Offering as many contact channels as possible *may actually work against the company*. According to a *Microsoft report*, customers around the world use three to five different customer service channels on average. Adding more channels to the omnichannel experience was supposed to help simplify the service and enable customers to pick whichever channel they preferred to resolve their issues. Instead, according to research, it often has the opposite effect. The addition of extra channels complicates the customer journey, increases the number of contact points and sparks more channel switching activity. *Gartner research* shows a direct correlation between the number of available channels and the number of customer contacts in a single resolution journey.

The core problem underlying omnichannel service strategies is the question of prioritization. When companies offer support across a variety of channels, but do not prioritize those channels in any way, nobody should be surprised when chaos ensues.



Will the customer intuitively know which channel is most suitable for solving their particular problem?

To make matters worse, all the available service channels are often presented to the customer as equals and in the same digital “real estate”—even if each channel actually specializes in providing particular types of assistance.

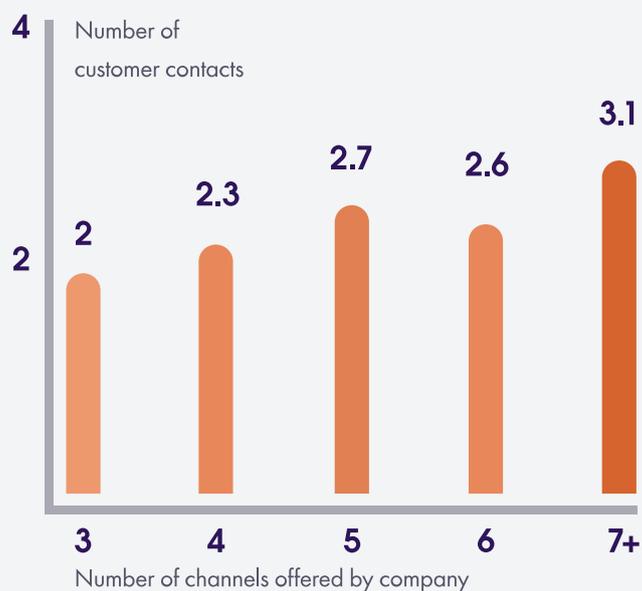


Every service manager is familiar with the following scenario: A customer has a problem and first decides to send an email. After two hours they get impatient and decide to call. While listening to the hold music, they also look up the company on Facebook and send a message using chat. Now there are three contacts on three different channels for one single request.

While this example sounds anecdotal, a study [published recently by Gartner](#) confirms that more choice isn't always better. In fact, their research found that the more channels a company operates, the more contacts customers make to the service center for a single case. Although the approach is intended to simplify customer service, more channel offerings actually create complex customer resolution journeys. Customers switch easily and frequently between channels and, in the worst cases, this can more than triple the costs associated with each contact request.

More offerings, more use

Comparisons of channels offered and customer contacts during resolution journey



n= 125 companies

Source: 2014-2019 Gartner Effortless Experience Survey

By applying an omnichannel service strategy with no clear prioritization and customer guidance, companies are actually doing themselves a disservice.

Not only are companies *increasing their own ticket and contact volumes*, they are inadvertently making their response times longer. On top of it all, they're creating a frustrating service experience for their customers by forcing them to navigate the tangled and confusing "channel jungle".

Especially when adding digital channels such as messaging apps and social media to their range of contact possibilities, service teams fail to meet or even manage their customers' expectations of instant service which come with these media types.



Source: Northridge Group Report, State of Customer Experience 2018

Enter the Funnel:

The Future of Customer Service

The Customer Service Funnel

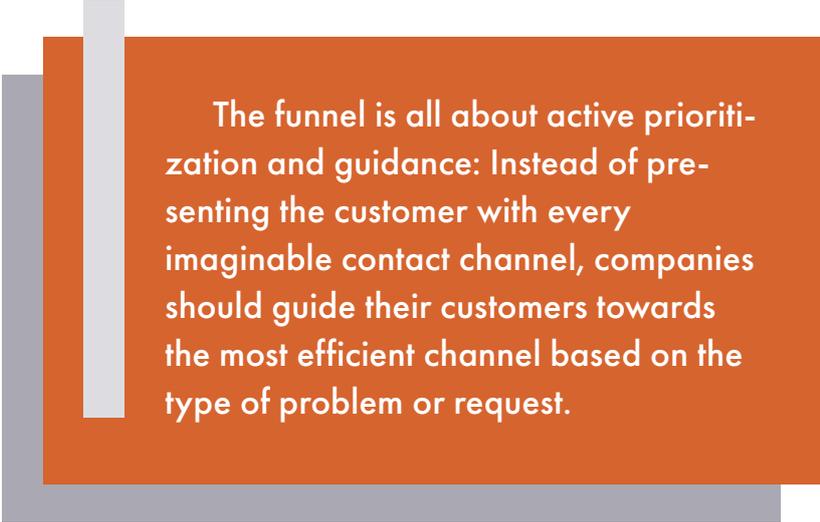
So how do you effectively mitigate the pain, frustration and costs of channel switching?

In our opinion, we've been looking at customer service strategy all wrong. By taking an omnichannel approach, we have focused on the channels themselves, instead of the types of requests that need solving, or indeed the *factors that define a good customer service experience*:

- Speed and efficiency
- Convenience
- Single contact resolution:
no multiple interactions

While there are *lots of studies on this topic*, virtually all of them *identify these same factors*.

The omnichannel mantra dictates that you will only get ahead of your competitors if you are present in every single channel that your customers are likely to use. No one can blame customer service managers for thinking that's the way to go. But being in every channel available is not really a strategy. Rather, it's a tactic that research is proving to be often unnecessary and expensive.



The funnel is all about active prioritization and guidance: Instead of presenting the customer with every imaginable contact channel, companies should guide their customers towards the most efficient channel based on the type of problem or request.

The principle behind the funnel is simple: All customers are first directed to self-service options, such as FAQ pages and chatbots, and from there, the interaction is escalated to the appropriate channel based on predetermined categories.

4

The Customer Service Funnel

Self-Service

Static

Website

FAQ

Help Center

Dynamic

Chat Widget

Messaging Apps

Social Media

Chatbot

Human Touch

Agent

Agent-Assisted Channels

Messaging Apps

Contact Form

Email

Phone

Video Chat



5

How to Create a Strategic Customer Service Funnel for Your Service Department

The point of the funnel is to help service managers be strategic about how different contacts are dealt with and how they are escalated within the service department.

In practice, this will mean directing all customers towards self-service first, then escalating the interaction to other channels further down the funnel as required.

Taking the funnel approach will also help you identify the requests that are best dealt with in the self-service layer (thus reducing the number of incoming tickets), as well as the high-

value requests that need additional attention (and often generate revenue), so that they can be fast-tracked to the most suitable agent.

If applied correctly, the funnel approach will offer every customer a superior service experience. They will receive the right help in the fastest, most convenient and efficient way possible.

In this section, we'll walk you through the first steps of applying a strategic customer service funnel in practice:

- setting the evaluation criteria for incoming requests
- evaluating the most common requests
- assigning them a "flow" within the service funnel

Let's assume that a channel audit has already been completed and that the overall performance and costs associated with the service department are already known. If this is not the case, we recommend performing a channel audit before executing the strategy.

When companies start putting together their customer service strategy, they need to strike a careful balance between controlling the costs of running a service department and meeting the customers' expectations.

All strategic approaches need clear, measurable goals. For a positive service experience, it helps to look at the goals from the customer's perspective and align the goals with the main indicators of good customer service: speed, efficiency, convenience and friendly service. Building the strategy purely from a cost perspective will not lead to the desired result and will soon manifest in lowered CSAT scores and increased churn.

5.1

Define the Evaluation Criteria for Incoming Requests

Depending on the service setup, you probably already have contact-reason tracking data that can be used to support the evaluation. This information is also a prerequisite for applying some of the more sophisticated criteria. However, it's perfectly possible to put together a solid, funnel-based customer service strategy even with rudimentary data.

Here are some simple evaluation criteria you could use:

Type of request:

- Repetitiveness—repetitive vs. not repetitive
- Complexity—Easy vs. Complex
- Urgency—Urgent vs. Not urgent
- Self-service vs. Agent-needed

We've tried to refrain from providing practical examples of the request types, as the specific cases that fall under these categorisations vary wildly between individual companies and between different products/services.

Impact:

- CSAT scores
- Churn / Reorder rate
- Conversion
- CLV

Evaluating the impact of the customer requests will help you to define the prioritization and the appropriate flow of escalation. Service requests commonly associated with a high impact tend to involve payments, delayed and damaged orders and pre-sales questions—but they can be anything (logins, account, bookings, technical bugs), depending on the type of company, product or service.

Next up, you need to look at the **contact reason** tracking and order history to evaluate the likelihood that a customer with a particular type of problem will, for example:

- Leave a bad review
- Churn (cancel their subscription / not order again)
- Not order at all (if not an existing customer)
- Leave a bad review and churn / not order

While this variable is at the more sophisticated end of the spectrum and requires dedicated business intelligence, it can be very valuable. If this data is available, it can—and should—have an impact on aspects such as the evaluation of request urgency. For service contacts that often result in churn, it is essential to take an attentive, empathetic and resolution-focused approach. Customer cases that would otherwise be lost to competitors **can still be turned around**.

5.2

Identify 20 to 50 of the Most Common Customer Requests

After you have defined the evaluation criteria for incoming requests, it's time to work out which types of requests your company receives the most. Identify 20 to 50 of the most frequent contact reasons and categorize them based on the evaluation criteria.

Customer service departments usually don't receive a lot of completely unique requests. Most of the time, the contact reasons can be quite clearly categorised.

Evaluating the top 20 to 50 most common requests in this way will give you an overview of what your customers are asking and will help you strike the right balance between service experience, engaging the service team where needed, and cost.

Request	Repetitiveness	Complexity	Urgency	Impact
Available payment methods	High	Low	High	Moderate
When will an item be back in stock?	Low	Low	Low	Low
I'm encountering a bug - I cannot purchase.	Low	High	High	High
Where is my delivery?	High	Low	Moderate	Moderate
My order is delayed	Moderate	Moderate	High	High
I want to change my booking	High	Moderate	High	High
I need consultation before I buy	Moderate	High	Moderate	High
Where is my refund?	Moderate	Low	Moderate	Low
My order arrived damaged	Low	Moderate	High	High

This example table shows how a variety of customer requests could be evaluated, based on the customer data available, company in question and product or service sold.

5.3

Decide How Different Request Categories Will Be Treated as They Flow Through the Funnel

With all your homework done, you can now start putting the customer service funnel into practice. The most common requests can be assigned a flow within the funnel based on their characteristics.

For B2C/D2C companies, the request categories could for example look something like this:

- 1**
- Moderate to Highly repetitive
 - Low complexity
 - Moderate to Low urgency
 - Low impact

Self-service first

Escalation only via contact form / email

- 2**
- Highly repetitive
 - Low to Moderate complexity
 - Moderate urgency
 - Moderate impact

Self-service first

Escalation primarily via live chat, phone only if unresolved

- 3**
- Low to Moderately repetitive
 - Moderate to high complexity
 - High urgency
 - High impact

Self-service first

Fast track to phone or live chat priority queues depending on customer preference

- 4**
- Low repetitiveness
 - Moderate to high complexity
 - Low urgency
 - Low to moderate impact

Self-service first

Escalation only via contact form or email

With the requests assigned to their respective categories, defining the possible escalation flow in the customer service funnel.

Request	Categories
Available payment methods	Category 1
When will an item be back in stock?	Category 4
I'm encountering a bug - I cannot purchase	Category 3
Where is my delivery?	Category 2
My order is delayed	Category 3
I want to change my booking	Category 3
I need consultation before I buy	Category 3
Where is my refund?	Category 1
My order arrived damaged	Category 3

As these are only examples, they should be seen as such. Depending on your organization's service mix, goals and overall evaluation criteria, there can of course be significantly more or even fewer categories.

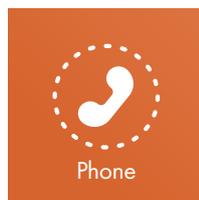
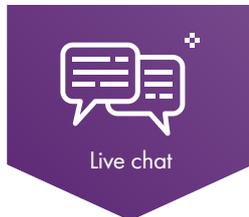
It's worth noting that the categories presented here would mostly apply to mid-market B2C/D2C companies in industries such as tech and retail (e.g. consumer apps, services or e-commerce companies). The evaluation criteria and particularly the categorization would be very different for companies focusing on B2B, or those with premium customers or key accounts. This being said, companies operating in B2SMB markets would most likely still benefit from a "self-service first" approach.

6

The Road Ahead

6.1

Modern Consumers Expect a Seamless Service Experience



The reason why the customer service funnel strategy is so effective is because in a world of plugins, add-ons and integrations, customers expect interactions that evolve and escalate. Nobody wants to explain their request multiple times. Ideally, these evolving interactions should take place within the same widget and interface. For example, a case could start with a self-service chatbot and escalate to live chat and then a phone call, without the customer having to navigate to a new page or look up any phone numbers.

What matters most to customers is having a conversational and convenient service experience with the fewest possible barriers to resolution. **As mentioned in the previous chapters, an omnichannel support with no funneled strategy has mainly failed in this regard.** Forcing customers to start over and repeat themselves with each new chat, email or call results in a bad service experience and is expensive for the company.

In the customer service funnel, the customer is seamlessly guided from one channel to the next in a controlled manner.

In the modern business landscape, service strategies should focus on providing a smooth, holistic service experience and not on maximizing the number of available channels. What customers want is speed, convenience and ease of use—the medium through which their request is resolved is ultimately irrelevant.

In fact, *according to a study published by Usabilla in 2019*, 54 percent of respondents said they would always choose a chatbot over a human customer service representative if it saved them 10 minutes. *According to a study in 2018 by Business Insider Intelligence*, “45% of consumers don’t care if they interact with a live agent or a chatbot, as long as the solution is quick and effective”.

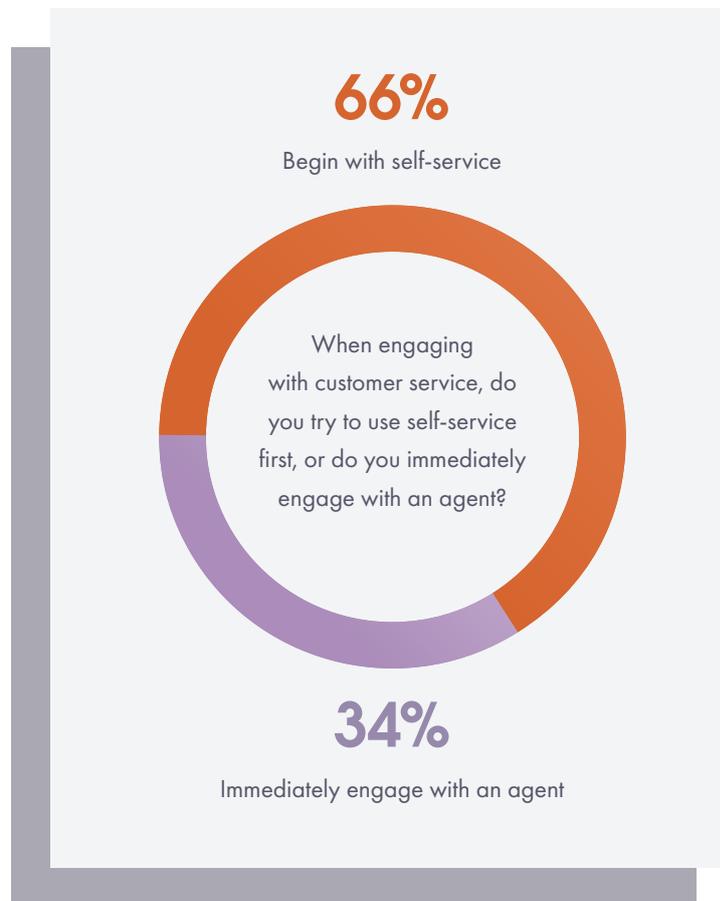


Source: *Business Insider Intelligence, 2018*

6.2

Self-Service Saves Time and Resources that Can Be Better Spent Elsewhere

The funnel approach initially directs more customers towards self-service, which is, according to [Microsoft's "State of Global Customer Service 2018"](#) report, what customers want anyway.

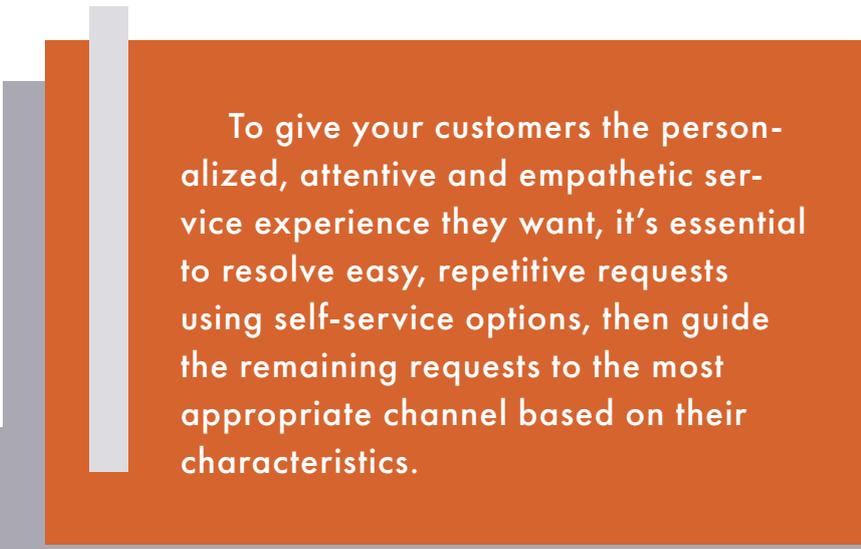


Source: [Microsoft, State of Global Customer Service 2018](#)

This means fewer requests will actually require the involvement of a service agent. Requests categorized as highly repetitive or low in complexity can usually be resolved through FAQ pages and chatbots, so those categories rarely result in tickets requiring more in-depth engagement.

By the same token, urgent or high impact cases can be easily identified and fast-tracked. This evaluation system gives service agents more time to dedicate to customers who need personalized help, such as those with high-value or time-critical requests. This can also mean more opportunities for cross-selling and up-selling initiatives, as well as more time to nurture customer relationships. Especially in the case of disgruntled customers, having greater capacity to attend to their needs will give companies *the chance to turn those experiences around* and increase customer loyalty.

When the funnel is properly implemented, customers will get the right help, the first time around.



To give your customers the personalized, attentive and empathetic service experience they want, it's essential to resolve easy, repetitive requests using self-service options, then guide the remaining requests to the most appropriate channel based on their characteristics.

Offering a smooth service experience is itself an empathetic act, as it values the customers' time and effort. Making customers spend one to two hours of their life on something that could be solved in one minute through self-service channels is a recipe for increasing churn. Frustrated customers and sales leads will turn to your competitors instead.

7

Conclusion

After almost two decades of omnichannel customer service, this approach is still not applied with the right strategy in most cases. While a great idea in theory, many companies have found that the misaligned strategy leaves a lot to be desired. Instead of simplifying the customer journey and improving the service experience, it has made matters worse.

This guide was motivated by our desire to help companies move past the omnichannel omnishambles. That's why we've chosen to share our insights into the innovative approach that has emerged to take its place: the customer service funnel.

The effectiveness of the customer service funnel is based on a solid understanding of the incoming customer requests. The funnel is built on prioritization and guidance. Instead of presenting the customer with every imaginable contact channel, they will be strategically guided towards the most efficient channel based on the type of problem they have.

This strategic tool is a response to today's empowered consumers who expect a superior service experience and want to have access to companies and their resources around the clock. It's up to service leaders to make sure that customers have the opportunity to quickly and easily help themselves, or seamlessly request further assistance if they need it.

In practice, the customer service funnel involves applying a "dynamic self-service layer" for repetitive and simple requests, where customer contacts are resolved without any agent intervention. But bear in mind that poorly managed self-service can be almost as harmful as removing that option altogether. The layer will only work in the company's favor if it is part of a funnel that includes strategic ways to escalate those requests that cannot be solved through self-service.

Automating all the easy, repetitive requests will free up your service agents to provide the kind of personalized, attentive and empathetic service that customers expect when they have more high-value requests. It's all about enabling meaningful conversations.

In the end, offering great customer service and providing a superior service experience is simple: Make sure your customers get the help they need, the first time around.

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Solvemate enables brands to deliver quality customer service through meaningful conversations. Our customer service automation platform is powered by smart conversational AI that allows companies to create chatbot conversations so service teams can focus their expertise where it matters most. Solvemate's unique contextual conversation engine learns more quickly, integrates more easily and resolves requests faster and more reliably than any other chatbot on the market. Brands benefit from a personalized, real-time self-service experience that increases customer satisfaction, reduces costs, and offers actionable customer service insights. Solvemate is trusted by brands such as On Running, musicMagpie, egym, and JustPark.

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