



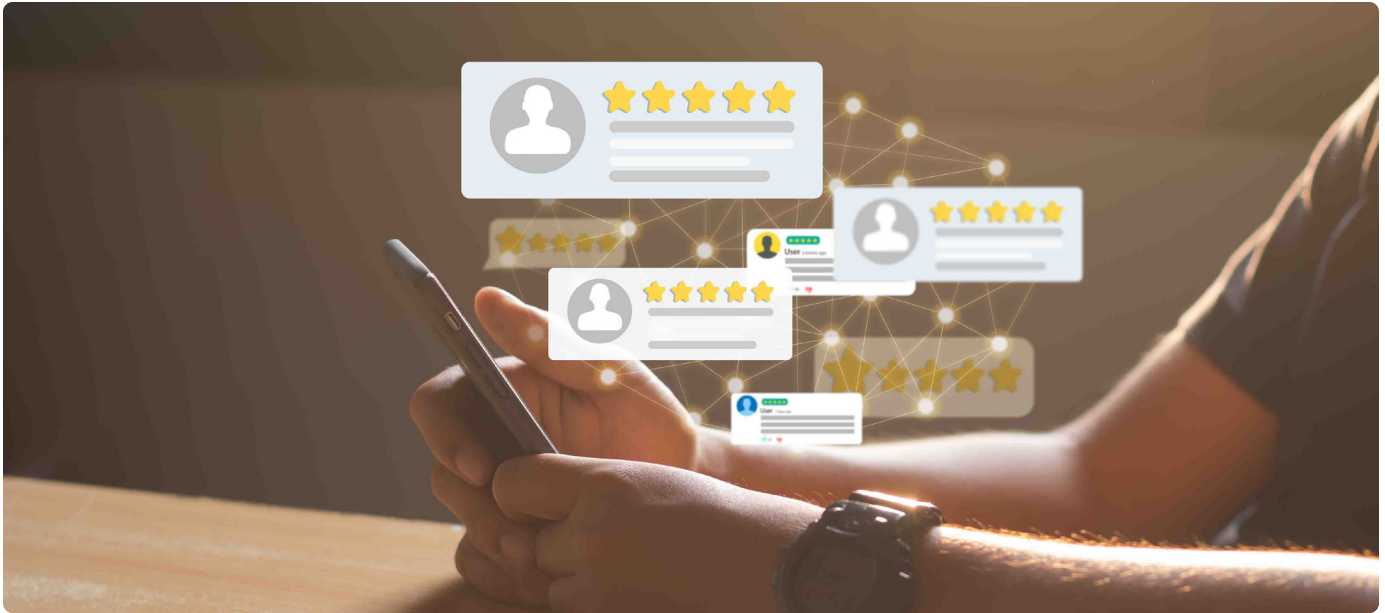
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The Complete Guide to Using Gartner's Four Pillars to Elevate Your Customer Service Strategy

WHITEPAPER

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Introduction

Good customer service is often thought of as simply responding to questions promptly and accurately, which is a good place to start. But when it comes to providing excellent customer service, there's more to it than that.

Gartner, the world's leading research and advisory company, breaks customer service down into four pillars: Getting Connected, Process Orchestration, Knowledge & Insights, and Resource Management.

These pillars together form the components of excellent customer service and provide a framework for organizations to focus on and evaluate when planning customer service initiatives. Below, we will dive deeper into each of these four pillars, by discussing what they are, how to implement them, and the benefits of incorporating the pillars into your customer service strategy.

01 Getting Connected

The first of Gartner's four pillars, Getting Connected, is "the ability to seamlessly connect the customer across voice and digital channels" ([Gartner](#)). This first pillar is considered the core capability of a Contact Center as a Service (CCaaS) solution ([Gartner](#)). Customer service cannot exist without some way for a customer to connect to the organization. In today's world, customers expect multiple ways of getting connected. With the rise of digital engagement, connecting to customers via voice alone is no longer enough.



Benefits of Integrating the Getting Connected Pillar Into Your Customer Service Strategy

While you may know that getting connected is essential for customer service, you may not know where to begin. How exactly should you be connecting? Fortunately, there are numerous contact center features and capabilities that can benefit your organization by optimizing this pillar. Below are some capabilities that enhance the way you connect with your customers and how they benefit your organization:

1

Connect wherever your customers want with omnichannel capabilities

Give your customers the flexibility to connect with you wherever they want. A single channel for connecting with customers is no longer enough. Fortunately, many solutions today offer email, [IM](#), [webchat](#), SMS, video, and [social media](#) capabilities in addition to voice.

Beyond offering multiple channels, you will want to ensure that those channels are interconnected to provide a true omnichannel experience. That is, full context should be available, no matter which channels a customer connects with.

For example, an agent answering a call should be able to easily see when and why the same customer reached out previously by IM, so that they have an understanding of the customer's situation and any prior issues they may have experienced.

2

Enhance convenience with a mobile application

There are many different communication channels that can be accessed via a mobile phone. However, if your customer already has a mobile application for your organization on their phone, having to leave the application when they want to reach out interrupts their experience. Integrating your customer support with your [mobile application](#) provides a more seamless and convenient experience by enabling customers to reach you directly via the app.

3

Extend availability with a chatbot

Similar to an IVR, [chatbots](#) provide customers with more options for connecting to an organization. They extend your availability, as they can provide 24/7 service, even if the contact center is closed.

4

Provide flexibility to agents by enabling mobile use

Like customers, agents may also want to engage via mobile, whether for personal preference, mobility, or some other reason. Fortunately, contact centers that enable agents to use either their cell phone number or their [Teams](#) mobile client provide the desired flexibility for agents as well. Ensure connections between customers and agents are possible anywhere, on any device, at any time.

6

Automate notifications when warning thresholds are met

Automatically notify managers when certain thresholds are met in the contact center, such as exceptionally high wait times. These alerts allow managers to immediately see any areas of concern, even if they're not actively monitoring the [dashboard](#). By identifying these issues quickly, managers can resolve them as soon as they happen.

5

Empower customers with self-service IVR

Customer service doesn't always require connecting with an agent. Sometimes a customer may want to change an appointment, update their account or order information, or receive an answer to a frequently asked question (FAQ), without waiting to speak to an agent. [Self-serve IVRs](#) offer customers an alternative (but still important) way to connect. They allow customers to receive service faster, while also saving agents' time for more complex tasks.



7

Eliminate long wait times in queue with callback options

When customers wait for a long time in queue, they might get frustrated and hang up or be in a bad mood by the time they finally reach an agent. By offering a callback option, you can limit the time customers spend waiting in queue. As a result, customers can move on with their day and avoid getting frustrated by long wait times.

8

Reduce call duration with voice biometrics

Customers want to be served as quickly as possible when they contact an organization. Having to spend time answering multiple authentication questions can be frustrating and negatively impact customers' service experiences. Contact centers can avoid this by using voice biometrics to authenticate users.



Using voice biometrics typically reduces call duration by 30-60 seconds, improving speed of service and customer satisfaction levels ([TechTarget](#)).

Truly optimizing the Getting Connected pillar involves more than just taking calls. There are many other important pieces of this pillar, as seen above. Reducing customers' pain points for reaching out to your organization will help you optimize your customer experience.

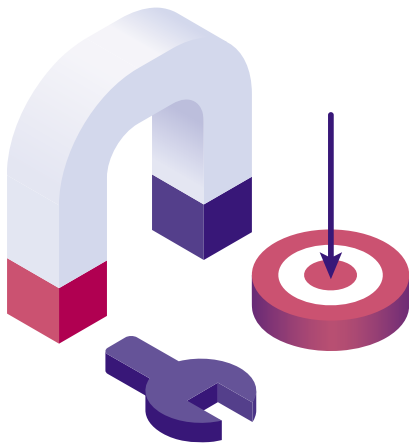
02 Process Orchestration

The second of Gartner's four pillars, Process Orchestration, highlights the importance of delivering proactive customer service, rather than relying on reactive support alone ([Gartner](#)). Traditional, reactive support involves waiting for customers to reach out with inquiries or issues, whereas proactive support involves anticipating and addressing customers' needs before they express them. This provides customers with faster and more personalized experiences.



Benefits of Integrating the Process Orchestration Pillar Into Your Customer Service Strategy

For excellent customer service, proactive support is essential. Below are some ways in which you can enhance your process orchestration, and ultimately improve customer service, using contact center features and capabilities:



1

Save time by auto-inserting activity records with a CRM integration

Proactive service requires agents to know their customers and understand their needs. This level of understanding requires efficient, consistent record-keeping on previous interactions. To improve record-keeping, agents can save time from manually entering data by using a [CRM integration](#) that can automatically create and auto-populate associated activity records as soon as a customer reaches out. These automated records ensure that complete records exist for every interaction. Previous interaction information is crucial to offering an enhanced customer experience as it equips agents with relevant information about each customer.



2

Provide personalized customer experiences with screen pops

Anticipate why a customer might be calling in and prevent them from repeating information by screen popping their contact page from your [CRM system](#). Customer information is retrieved from the CRM and sent to the agent based on past interactions. This means that agents are instantly provided with the context they need to fully understand a customer's situation, even before they've said anything.

3

Provide proactive reminders with automated notifications

Prevent customers from missing upcoming appointments with proactive [outbound notifications](#). Automatically send out reminders and messages through texts, calls, or emails instead of sending them out manually. This not only supports proactive customer service but saves agents time from having to manually reach out to customers.

4

Provide instant responses with self-service IVR

Reduce wait times by deploying an [IVR](#) as the first line of response for both voice and digital channels. Customers can receive answers to frequently asked questions, receive updates on tickets, or make changes to their accounts. Proactively supplying answers to customers' FAQs through an IVR allows them to receive information without having to speak to an agent. This reduces the need for assisted human engagement, freeing contact center agents for more complex issues.

5

Eliminate misdials with click-to-call

Outbound communication is an important part of proactive service. Unfortunately, misdials can often be a part of outbound communication that stands in the way of providing accurate proactive service. A [CRM integration](#) allows agents to use a click-to-call feature to ensure they are contacting the right person. Click-to-call prevents misdials and saves time compared to manual dialing, ensuring that proactive service is quick, accurate, and convenient for the agent.

6

Extend support availability with bots

Bots can improve the ease of use of your self-service IVR by adding natural language processing. Rather than selecting an option from a menu, customers can speak or type what they are looking for. This can reduce the number of IVR menus they need to go through and provide quick answers to their inquiries. Voice bots and [chatbots](#) eliminate the need for human agents to answer repetitive and basic inquiries, giving them more time for complex questions.

7

Proactively reach out to customers with campaign tools

Campaigns for contact centers can help organizations increase revenue, improve customer loyalty, and more, by providing efficient ways for agents to reach out to customers. With automated outbound dialing and comprehensive reporting, these tools can help to maximize campaign productivity, optimizing organizations' proactive service.

Process Orchestration encourages organizations to implement proactive customer service. Customers expect instant, relevant, and accessible support from organizations. As these expectations continue to grow, Process Orchestration becomes a critical component of your organization's customer service. To maintain successful customer service at your organization, implement proactive customer service capabilities.



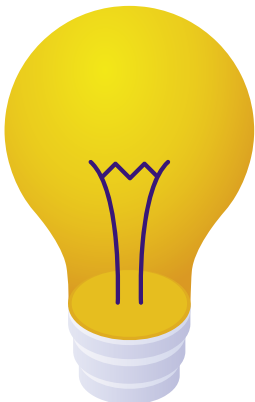
03 Knowledge and Insights

Gartner's third pillar of customer service, Knowledge and Insights, involves "the management and real-time availability of contextually relevant information to assist in interactions" ([Gartner](#)). In order for organizations to successfully nurture customer relationships, they must engage in insightful, relevant, and timely communications across multiple channels over numerous devices ([Gartner](#)). Additionally, relevant insights should guide overall customer service strategies in the long run.



Benefits of Integrating the Knowledge and Insights Pillar Into Your Customer Service Strategy

Using available knowledge and insights in your customer service initiatives can greatly benefit your customers and your organization. The types of valuable insights that provide these advantages can come from contact center features directly or from contact center integrations with other tools. The list below explains some of these features and capabilities, and how the knowledge and insights gained from them can benefit your organization:



1

Address issues as they arise with real-time monitoring

Supervisors can improve customer and agent experiences by using real-time monitoring tools to optimize agent management. [Real-time dashboards](#) that let supervisors view the current status of various agents, queues, and teams can help them address issues as they arise.

By monitoring statistics, such as average time in queue and more, supervisors can decide what actions should be taken and when. For example, they can see when to allow breaks or reassign agents to different queues, preventing overloaded queues and reducing customer wait times and agent stress levels. Supervisors can also set up alerts to know when critical thresholds are being approached, even if they're not actively watching the dashboard.



2

Improve strategic decision-making with historical reports

While real-time monitoring is helpful for on-the-fly decisions, [historical reporting](#) is important for long-term strategic decisions. Using contact center reports to view data over a longer period can help predict seasonality, guide decisions on staffing levels, test the effectiveness of new strategies, and more. Reporting tools ultimately help guide strategic decisions to maximize efficiency and optimize all customer service efforts.

3

Help agents reach their maximum potential with evaluations

Supervisors can help agents improve their performance through contact center [evaluation tools](#). By providing feedback and identifying areas for improvement, supervisors using evaluation tools can help agents reach their maximum potential and serve customers better.

4

Enhance training efforts with recordings and transcripts

Provide valuable insights and learning opportunities with [recordings and transcripts](#). Supervisors can use these records for agent evaluations, allowing them to manage performance and see where additional training may be required. Recordings and transcripts can even be used as examples in training scenarios, helping new hires to learn best practices. These various use cases can improve customer service by helping to optimize agent performance.

5

Assist agents and improve service with artificial intelligence

Modern contact centers can use artificial intelligence (AI) to optimize their customer service via knowledge and insights. AI can automatically perform key phrase and sentiment analysis and recommend the next best actions to agents, providing them with learning opportunities and improving customer service. AI can even provide automated call scoring after a call is completed to evaluate agent performance and call outcomes.

6

Unify multiple data sources with a Power BI integration

Provide more ways to view and analyze data by integrating your contact center with Power BI. Users can bridge the information between the contact center, [CRM](#), [WFM](#), and more, enabling them to create custom reports for visualizing data in a user-friendly way.

7

Enable continuous improvement with survey tools

Continuously improve your service to customers by collecting regular [feedback](#) from them that identifies strengths and weaknesses in individual agents and the organization as a whole.

8

Standardize and elevate service with screen pops to knowledge bases

Elevate your service by providing instant access to relevant information. Automatically provide agents with critical information by screen popping information from knowledge bases, based on what the agent or caller is saying. This may include scripts for handling certain types of interactions, product information or policies a customer is asking about, and any other internal shared information that can help an agent better serve the customer.

There are many ways to gather knowledge and insights using your contact center, and even more ways that knowledge and insights can help you to optimize your customer service. Be sure to take advantage of all the tools that your contact center offers to truly make the most of knowledge and insights for customer service.



04 Resource Management

Gartner's last pillar of customer service, Resource Management, is about "developing and maintaining engaged and empowered staff based on the understanding that engaged employees power a stronger customer experience" ([Gartner](#)). It highlights the importance of providing positive agent experiences so that those agents in turn provide positive customer experiences. By supporting employees with the right tools, organizations can enhance the agent experience, which ultimately leads to stronger customer service.



Benefits of Integrating the Resource Management Pillar Into Your Customer Service Strategy

Managing resources effectively enables employees to provide enhanced customer service within organizations. The list below explains some of the contact center features and capabilities that exist to improve agent experiences, and, ultimately, customer service.

1

Leverage tools that agents are familiar with to ease their experiences

Reduce agents' need to learn new tools by integrating existing applications, like CRM or ticketing systems, into your contact center. Familiar tools will allow agents to have an easier time navigating a platform to fulfill customer requests successfully.

3

Ease agent workload with self-service tools

Avoid overloading agents with tedious and repetitive tasks by enabling self-service tools like [IVRs](#) and [chatbots](#). Provide customers with self-service options so that agents can save their time for handling more complex tasks.



2

Avoid understaffing by forecasting demand

Prepare for spikes in interactions and prevent understaffing by scheduling the right number of agents at the right time. Advanced Workforce Management ([WFM](#)) solutions adopt a comprehensive approach that automatically creates agent schedules based on skills, requested time off, and anticipated staffing needs. Keeping your contact center adequately staffed at all times can help prevent overloading agents, ultimately helping to [prevent stress and burnout](#).

4

Give agents the autonomy to set their schedule

Advanced [WFM](#) tools that integrate with the contact center involve agents in the scheduling process. Agents can manage their schedules by requesting time off and trading shifts with other agents to better fit their needs. This prevents burnout and gives agents the freedom to take a day off when they need it!

5

Motivate and guide agents with evaluations

Provide agents with helpful feedback on their performance by using a contact center's built-in evaluation tool. This ensures that agents understand where their performance level is at relative to expectations, and that they have appropriate guidance on how to excel in their career.

7

Improve first-contact resolution by routing interactions appropriately with skill-based routing

Using skill-based routing ensures that agents are only put in a position to manage interactions they can handle. Skill-based routing allows managers to set skill levels in different areas for each agent, ensuring that an agent will never be overwhelmed by expectations of handling an interaction beyond their skill level. This also keeps customers from being transferred multiple times and waiting too long for service.

6

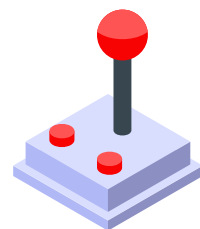
Support agents by screen popping relevant information

Equip agents with relevant customer information and context around requests. This enhances the experiences for agents as it reduces the need to manually search for customers' information. Furthermore, relevant details prepare agents to interact with customers immediately and effectively.

8

Increase agents' engagement and motivation with gamification

Increase agents' engagement by implementing friendly competition. Instead of training agents through presentations, create an interactive online course that includes a scoring system and fun characters. Emphasizing team or individual achievements can boost overall workforce morale.



The Resource Management pillar highlights the significance of maintaining engaged agents at your organization. By supporting your employees, you create and retain high-quality and well-equipped agents. Providing the right contact center tools can improve agents' experience, and, in turn, they can better serve your organization's customers.

Conclusion

It is evident that excellent customer service extends far beyond the surface-level requirement of quick and accurate responses to customers' inquiries. There is so much more behind the scenes that contributes to customer service. Fortunately, there is also an abundance of different features and capabilities, available either directly from a contact center or indirectly through third party integrations, that can help with the different components.

By taking advantage of these features and capabilities, your organization can optimize all four of Gartner's Pillars of Customer Service: Getting Connected, Process Orchestration, Knowledge and Insights, and Resource Management. Optimizing these pillars will, in turn, lead to the kind of excellent customer service that can set an organization apart from its competitors. To learn more about how contact center features and capabilities can improve your customer service, visit us at computer-talk.com.

About Us

ComputerTalk is the developer of ice Contact Center. ice modernizes the call center with business application integrations, AI, and analytics across all communication channels, helping organizations deliver outstanding customer experiences. As a Microsoft Teams native contact center solution, ice allows users to handle all interactions within a single interface. Founded in 1987 and headquartered in Markham, Canada, ComputerTalk powers enterprise-class contact centers for organizations across the globe.



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