

salesforce

FOURTH EDITION

STATE *of* SERVICE

Insights from over 7,000 customer service professionals worldwide



A Note from Bill Patterson

EVP and GM, B2B CRM



As I write this note, businesses across all industries and geographies are wrapping up a year of extraordinary change, challenge, and consequence that few of us could have predicted. While no role is left untouched by our global health and economic crises, service organizations have experienced particular upheaval. Case volume from anxious and confused customers skyrocketed, the move to digital channels surged, and teams navigated an extraordinary shift toward remote work for some employees and new safety protocols for others. All the while, few organizations saw a corresponding influx of resources.

While its scale and speed escalated during 2020, customer service transformation was already well underway. Agents had more strategic roles, technologies like artificial intelligence drove new efficiencies, and success metrics emphasized customer satisfaction over closing tickets. High-performing teams, in particular, were well positioned to embrace – and deliver against – their elevated mandates as customer retention took on even greater importance for their businesses.

Our latest “State of Service” report, based on over 7,000 survey responses worldwide, provides an unparalleled view of how the trajectory of customer service has – and hasn't – changed. The report also illustrates the strategies embraced by top teams as they plot their futures. My hope is that you'll find these insights valuable not only for weathering the current storm, but planning for brighter days ahead.

A handwritten signature in black ink that reads "Bill Patterson". The signature is written in a cursive, flowing style.

Bill Patterson

What You'll Find in This Report

For the fourth edition of our “**State of Service**” report, Salesforce Research surveyed global customer service professionals to determine:

- How customer service standards continue to change in the midst of crisis
- Which strategies, tactics, and technologies service organizations are turning to in the new normal
- How service organizations are navigating abrupt changes in their work environment
- The impact and trajectory of field service during a time of social distancing

Data in this report is from a double-blind survey conducted from August 21 through September 26, 2020, that generated 7,095 responses from full-time customer service professionals across 33 countries and six continents. Respondents are third-party panelists (not limited to Salesforce customers). See page 47 for further survey demographics.

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from exact numbers (not rounded numbers).



Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.

Over

7,000

service professionals surveyed worldwide



North America

Asia Pacific

Europe

Middle East

Africa



Who We Surveyed

In this report, we refer to the following respondent groups.

Decision Makers

Service vice presidents, directors, and team leaders

Agents

Front-line service workers who interact with customers either remotely or in the field, inclusive of mobile workers

Mobile Workers

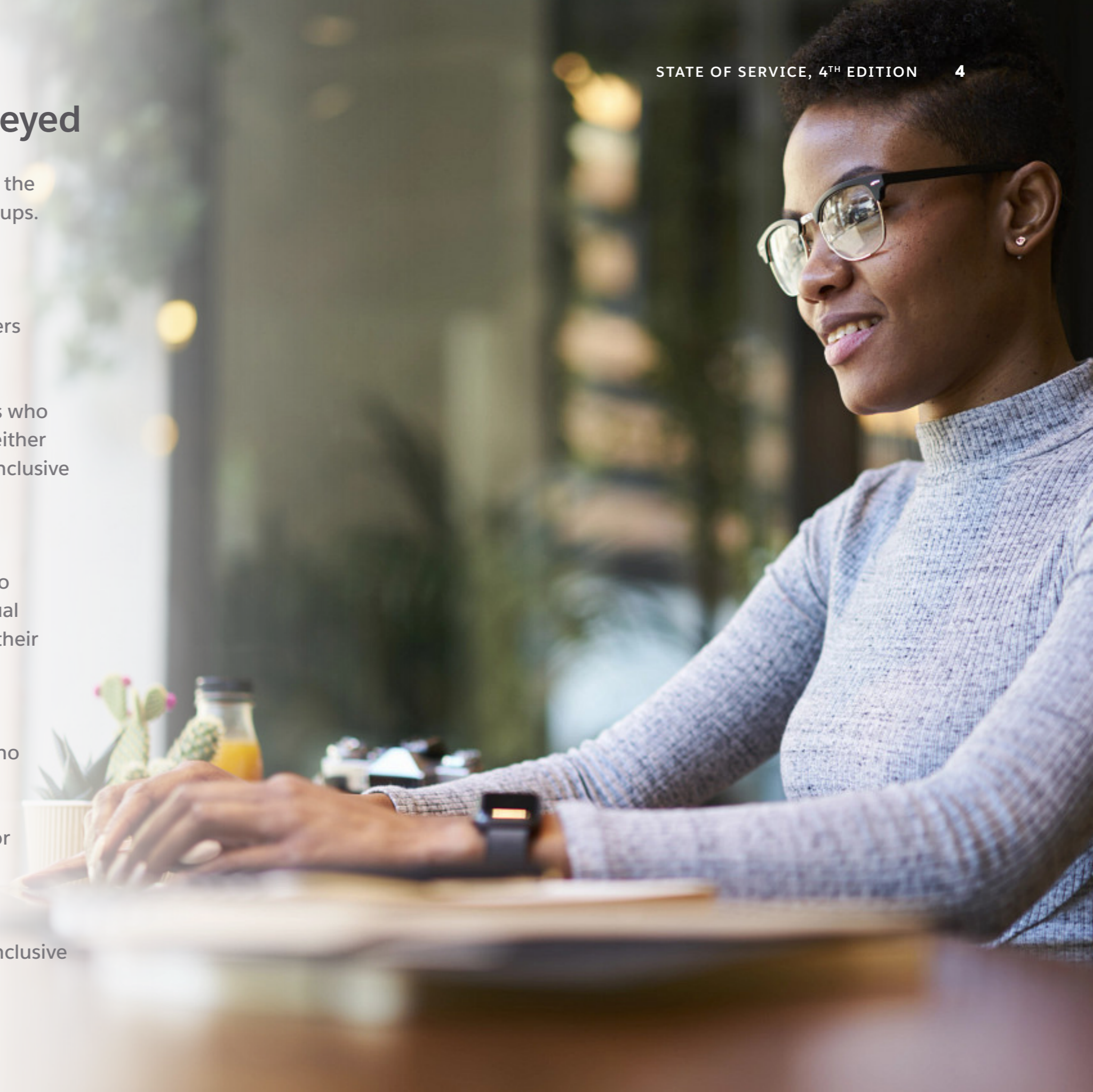
Front-line employees who provide in-person or virtual support to customers at their home or business

Dispatchers

Back-office employees who support field operations, including scheduling and dispatching employees for field service

Service Professionals

All survey respondents, inclusive of all groups above



What You'll Find in This Report

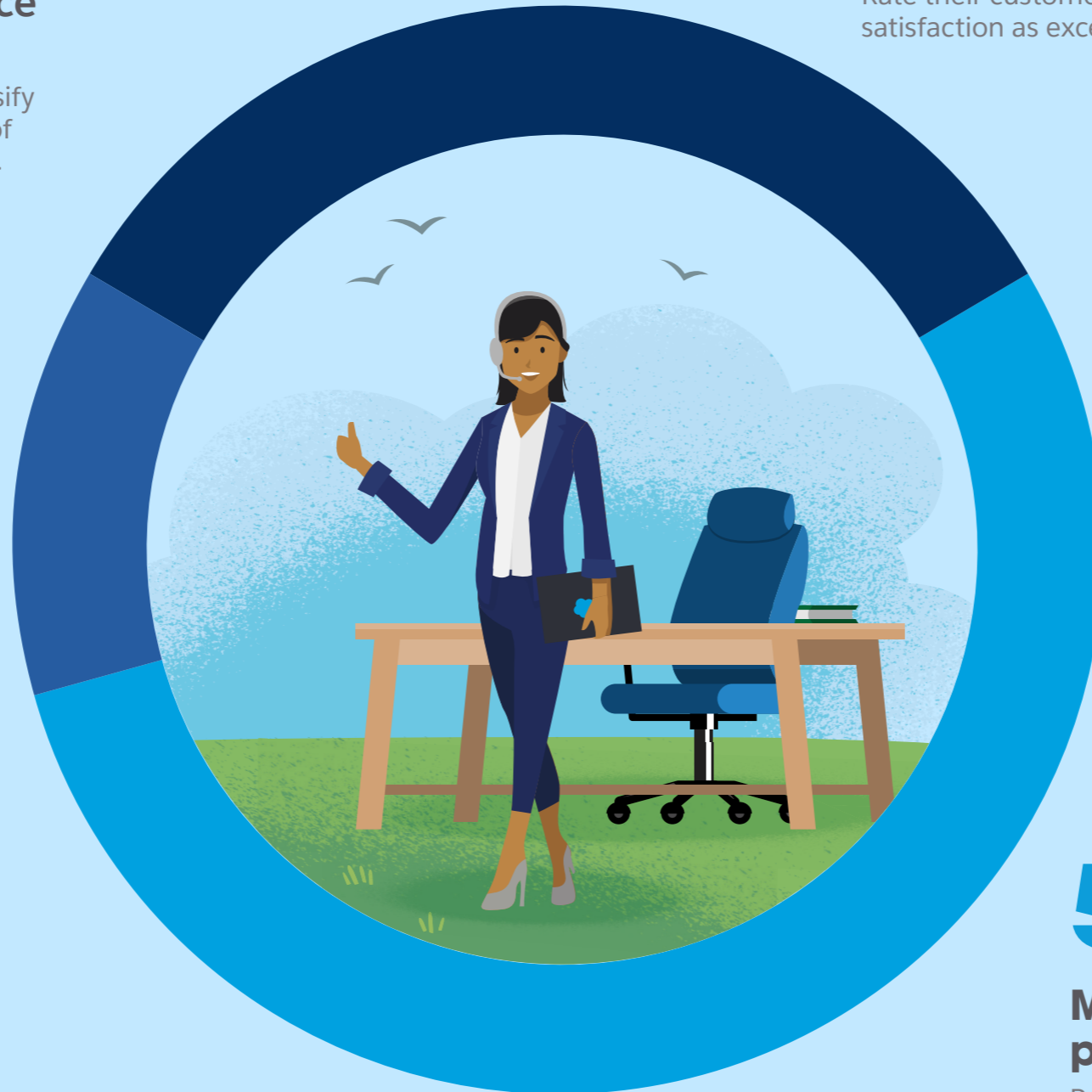
Distribution of Service Performance Levels

Throughout this report, we classify respondents across three tiers of sales organization performance.

13%

Underperformers

Rate their customer satisfaction as fair or poor



33%

High performers

Rate their customer satisfaction as excellent

54%

Moderate performers

Rate their customer satisfaction as good

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Executive Summary

In the face of unexpected and extraordinary change impacting every facet of business and society, service transformations have kicked into overdrive. A swift shift to digital-first customer engagement and remote work, among other factors, has prompted teams to reconsider the future of their people, process, and technology.

01

Teams Navigate New Standards of Engagement

As customer expectations shift, a new digital-first playbook is emerging. **Eighty-one percent of decision makers say they're accelerating digital initiatives.**

02

Agent Agility is Key as Demand Surges

Resources are largely flat as case volume surges, prompting teams to rethink their tactics and tools. **Seventy-four percent of decision makers say they're more reliant on data than before the pandemic.**

03

Service Extends to Sales, Marketing, and Beyond

Service teams are increasingly integrating their metrics, objectives, and technology with sales, marketing, and ecommerce colleagues. **Seventy-nine percent of service professionals say it's impossible to provide great service without full customer context.**

04

Workforce Management Takes a New Shape

With social distancing necessary for the foreseeable future, service teams are building the future of work in real time. **Only 42% of service professionals believe they'll work outside the home in 2021.**

05

Career Paths Come into Focus

Playing an increasingly visible and strategic business role, service agents are increasingly enthusiastic about their futures. **Sixty-seven percent of agents see a clear career path – up from 59% in 2018.**

06

Field Service Evolution Drives Revenue

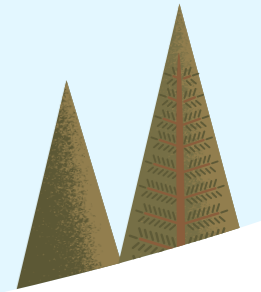
Customers remain enthusiastic about service that comes to them, leaving field service investments largely intact. **Seventy-five percent of decision makers say field service is key to their overall strategy.**



INTRODUCTION | Crises Shift Service Transformation Into High Gear

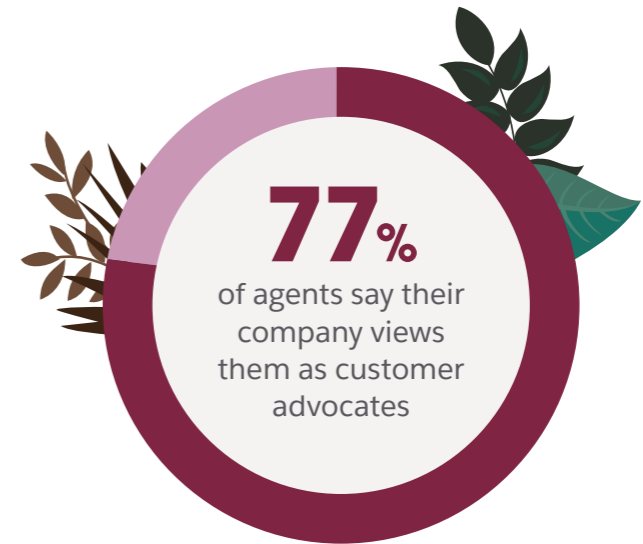
The strategic role of customer service continues to rise as power shifts from businesses to customers who demand increasingly tailored engagement. In the midst of dual health and economic crises that demand care and guidance, customers have put even greater stock in

quality service and support. The role of an agent goes far beyond closing tickets; agents are now a prominent face of the brand.



Customer-Centricity Reigns as Needs and Expectations Shift

Customers Who Agree With the Following Statements*



* "State of the Connected Customer," October 2020.

INTRODUCTION | Crises Shift Service Transformation Into High Gear

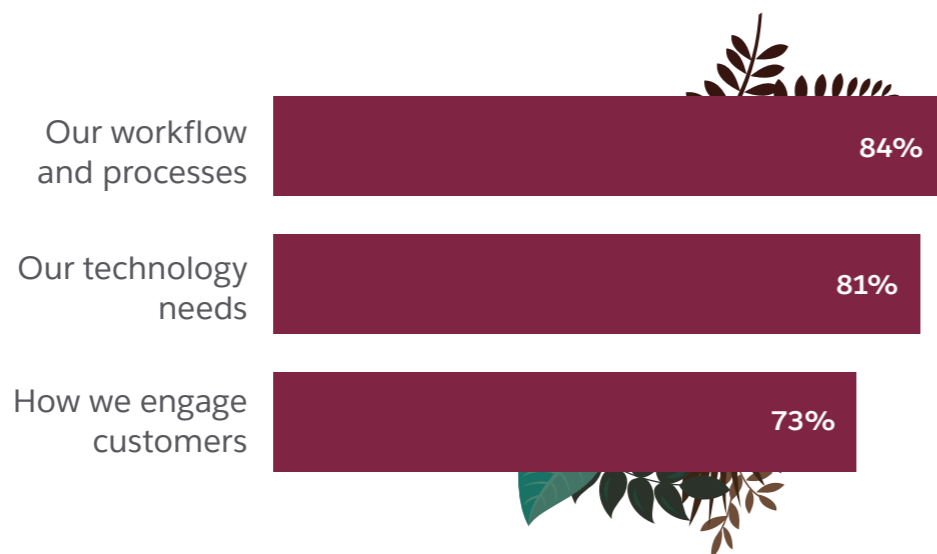
As established in the third edition of our “State of Service” report, the rising importance of customer service to overall business goals was clear long before the events of 2020. This trend continues, but the service playbook has been upended.

Facing a sharply different environment defined by shifting business models, distributed workforces, and a host of new and evolving customer needs, service teams are facing radically new standards of engagement. The implications for how teams work – not to mention the technology they need – are hard to overstate.



Service Playbooks Are Being Rewritten

Service Professionals Who Say the Pandemic Has Changed the Following



78% of decision makers say they've invested in new technology as a result of the pandemic.

See page 37 for additional data segmentations.



01

Teams Navigate New Standards of Engagement

Empathy has always been a key skill for providing great customer service. When everyone’s experience is both uncharted and unique, empathy is even more essential. **Seventy-one percent of consumers say that businesses that show empathy during the pandemic have earned their loyalty.***

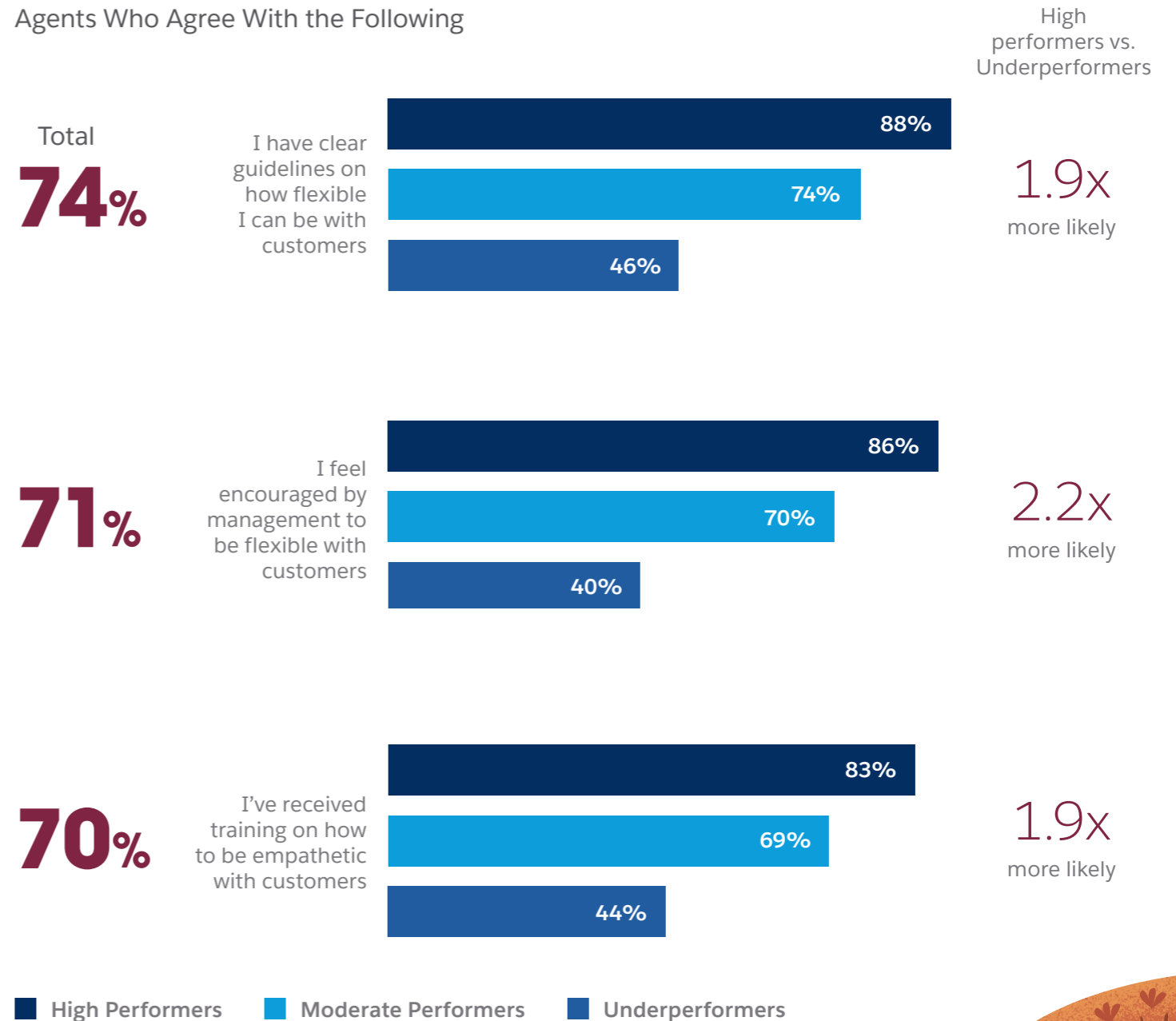
Policies and protocols are key to operating a successful business. However, their rigidity can stand in direct conflict with customer satisfaction, particularly when circumstances are out of the customer’s control. The vast majority of teams have adjusted policies to allow more flexibility, but agents on top teams have far more clarity, encouragement, and training on how to execute.

83% of service professionals say they’ve changed policies to provide more flexibility to customers during the pandemic.

* Salesforce Consumer & Workforce Series, May–August 2020. See page 37 for additional data segmentations.

Empathy and Flexibility Are the Foundations of Great Service in 2020

Agents Who Agree With the Following



01

Teams Navigate New Standards of Engagement

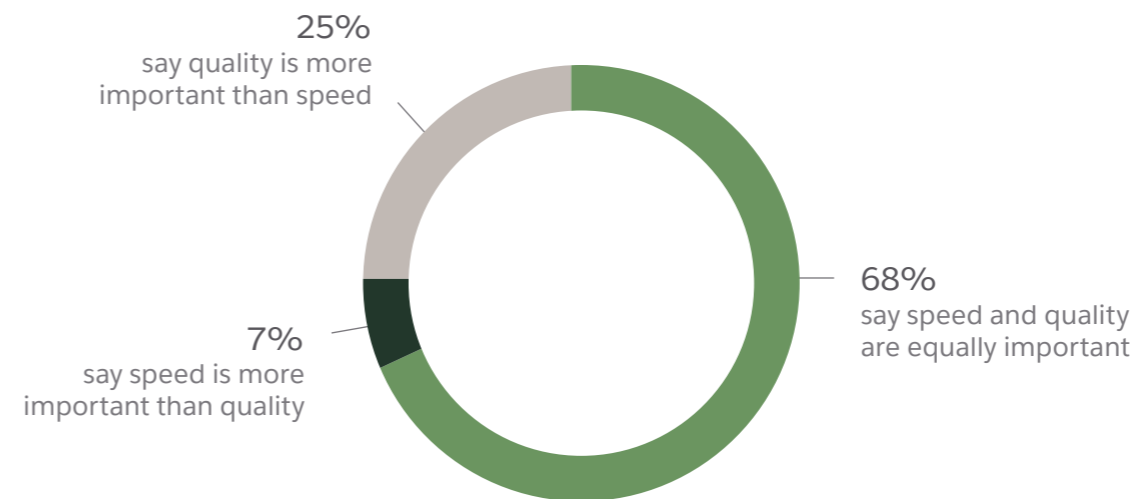
Empathetic service may take more care, but it doesn't necessarily take more time. Customers still expect seamless and quick resolutions. **Eighty-three percent of customers expect to interact with someone immediately when they contact a company, and 82% expect to solve complex problems by talking to one person.***

More than two out of three service professionals view quality as important as speed, yet delivering both is easier said than done. Self-assessments show clear room for improvement when it comes to helping customers quickly and effectively.

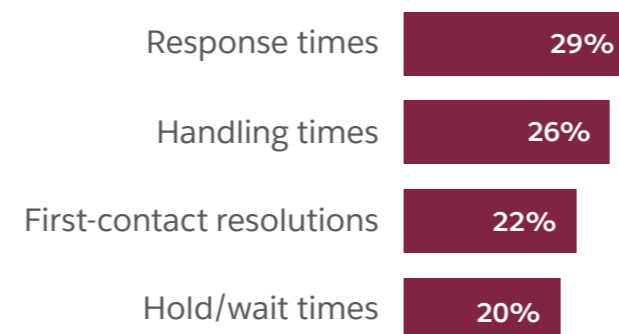
63% of agents say it's difficult to balance speed and quality.

Balancing Speed and Quality Is a Conundrum

How Service Professionals View Quality and Speed



Service Professionals Who Say Their Organization Excels at the Following



* "State of the Connected Customer," Salesforce, October 2020.

01

Teams Navigate New Standards of Engagement

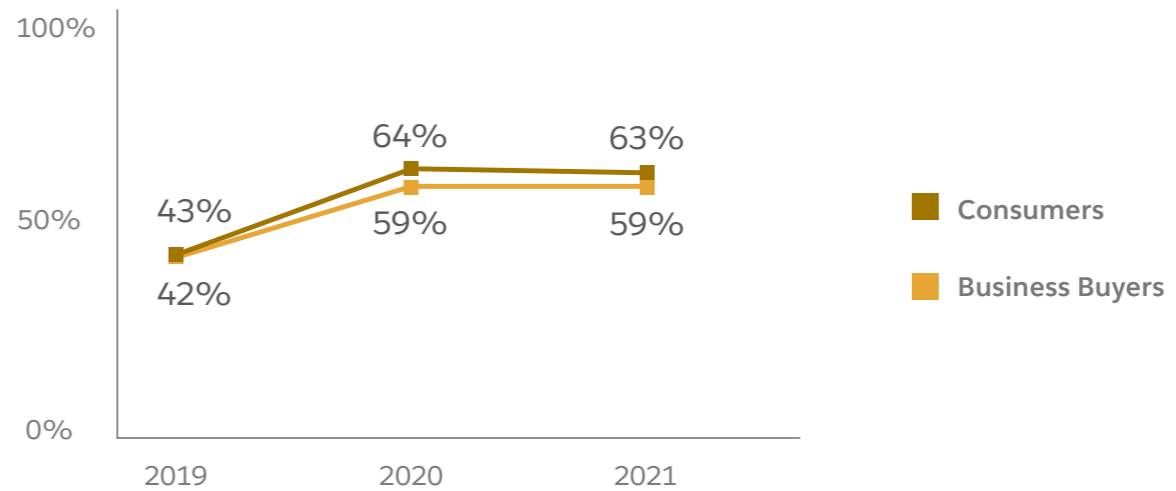
As customers spend more time at home with their devices and less time in stores or places of work, the shift toward digital channels has accelerated. At the same time, the share of organizations offering in-person customer service plummeted, and channels such as online chat, messenger apps, and video support saw double-digit adoption gains. **Eighty-seven percent of service professionals say customers have increased their use of digital channels during the pandemic.**

Customers expect their affinity for digital engagement to last beyond the peak of the pandemic, prompting service organizations to move up their timelines for digital transformation.

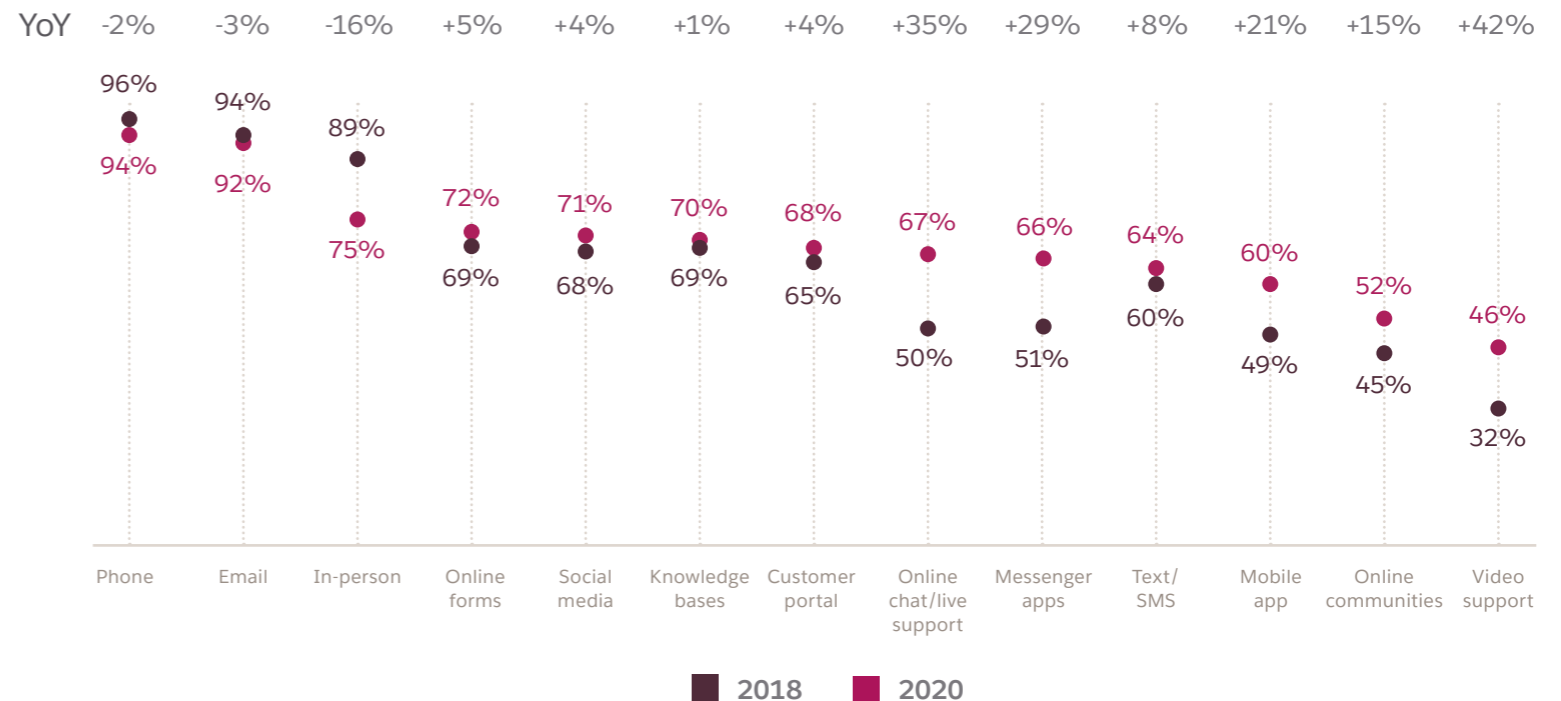
81% of decision makers say they're accelerating digital initiatives.

As Customers Go Digital, So Do Contact Centers

Estimated Share of Interactions With Companies Taking Place Online*



Service Organizations That Report Using the Following Channels**



* "State of the Connected Customer," October 2020.

** Year-over-year growth rate is calculated with the formula (new value-old value)/old value.

See page 40 for additional data segmentations.

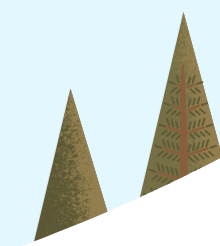


SPOTLIGHT | The Future of Voice

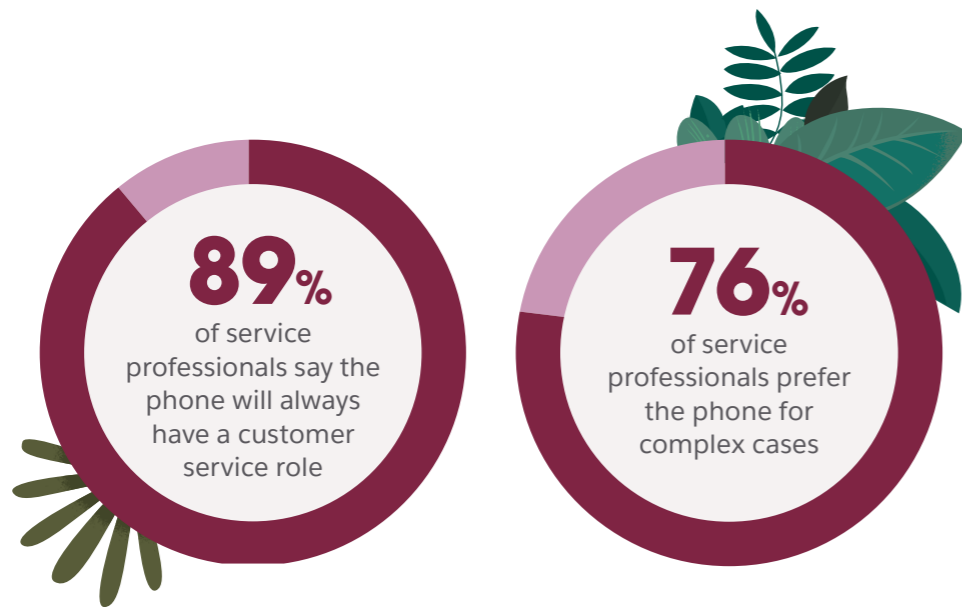
As voice assistants like Siri and Alexa become a common vehicle for simple tasks, their prospective role in customer service is intriguing. **Fifty-seven percent of service professionals believe voice assistants will become a key service channel.**

But another, more familiar way of asking for help – over the phone – remains a preferred channel for many. **Customers rank the phone as their second most-preferred channel (after email).***

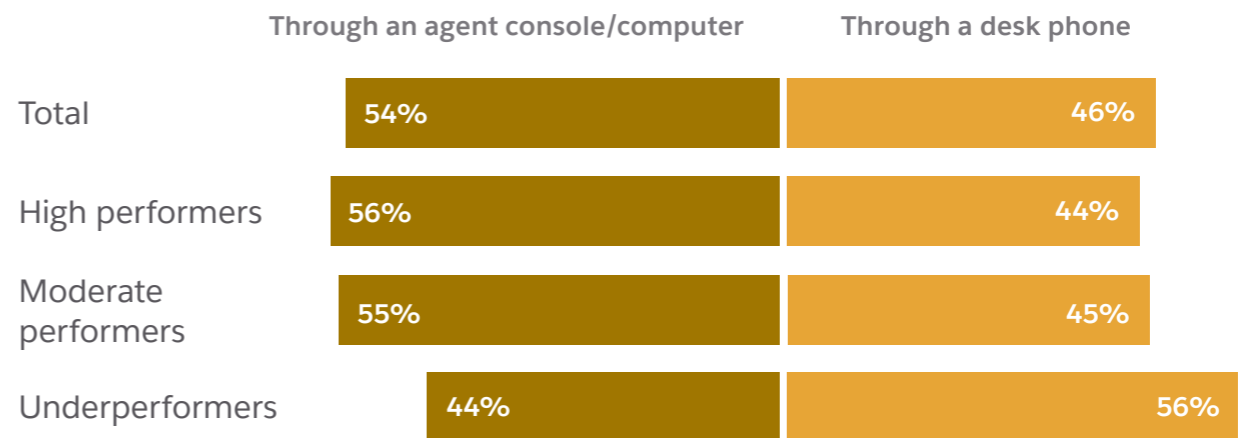
Agents also prefer the phone for complex issues that require two-way conversation, and don't see the phone being replaced any time soon. However, how agents answer and process phone calls is evolving. The majority of service agents – aside from those on underperforming teams – are more likely to handle voice calls through a computer than a desk phone.



The Phone Persists – but Evolves – as a Service Channel



How Agents Handle Customer Calls



* "State of the Connected Customer," October 2020.

Trailblazer Story

Empowering Agents With Voice Maximizes Time and Creates Visibility

With many calls lasting 30–60 seconds, connectRN's customer success team noticed that calls were not accurately captured in their systems, thus skewing results and causing accuracy issues with case resolution numbers or call volume reports.

connectRN tapped a new cloud-based telephone solution to better address its needs. The system captures and understands voice conversations, while efficiently sharing insights and escalations with upper management. Additionally, agents are provided with recommended actions in real time.



3.1K

Calls received in first 4 months



3x

Increase in call volume



1 month

From purchased to fully live with cloud telephony



01

Teams Navigate New Standards of Engagement

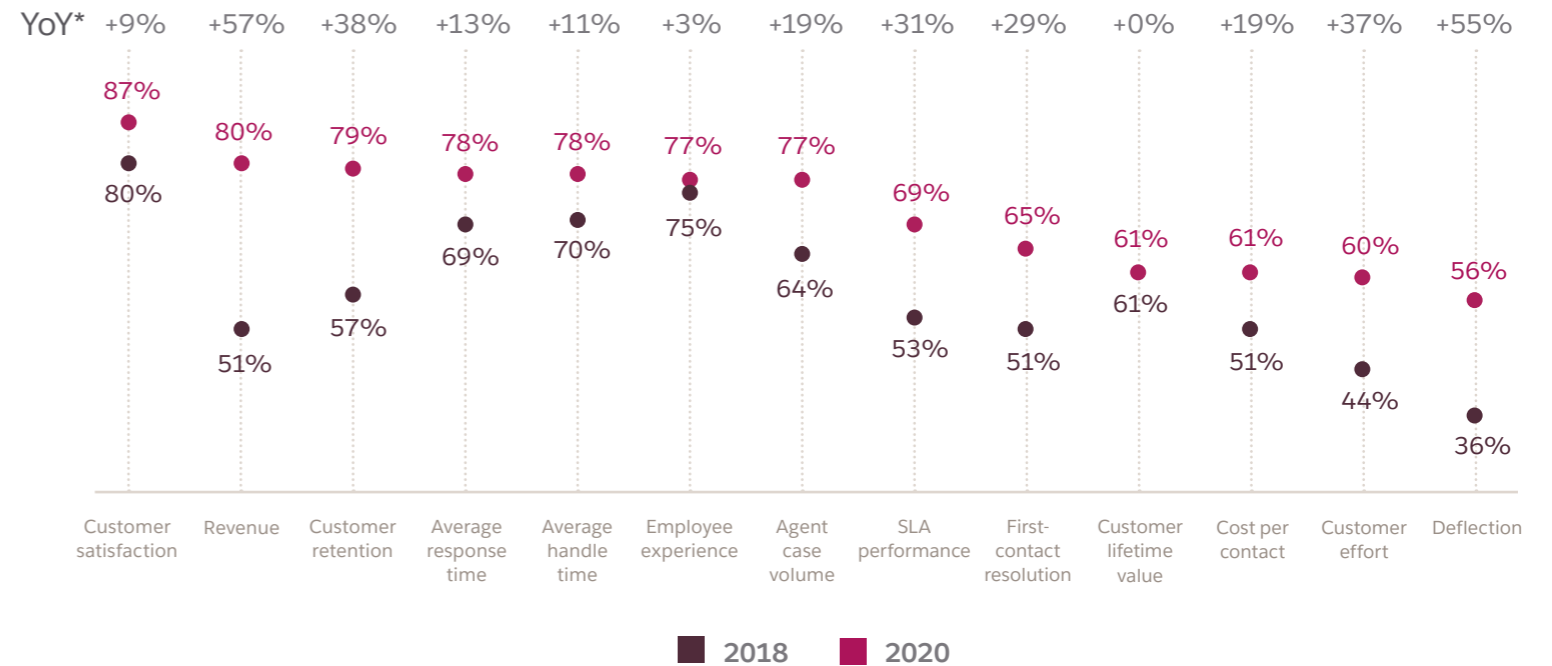
In 2018, we found that customer service teams were adding a variety of KPIs related to customer experience and business value to their tried-and-true operational metrics. That trend continues, with particularly significant rates of increase in teams tracking revenue, case deflection, and customer retention.

71% of service professionals say they've changed or reprioritized metrics due to the pandemic.

Customer satisfaction remains the most essential service metric, but a relatively new success measure – customer effort – is now included among the most indispensable KPIs.

Shifting Success Measures Reflect Customer and Business Objectives

Service Organizations That Track the Following Metrics



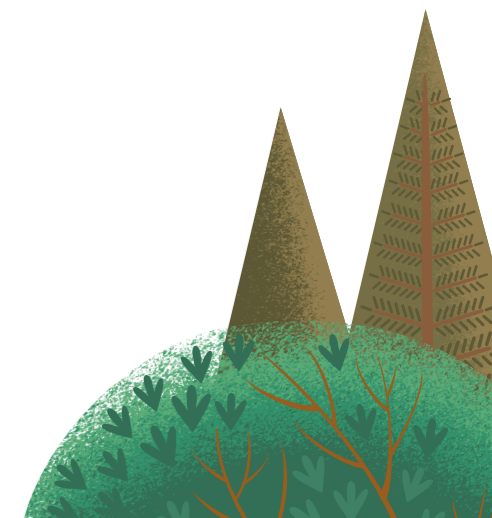
Five Most Important Service Key Performance Indicators**

- 1 Customer satisfaction
- 2 Revenue
- 3 Customer retention
- 4 Customer effort
- 5 SLA performance

* Year-over-year growth rate is calculated with the formula (new value-old value)/old value.

** Base: Respondents who track the corresponding metric.

See page 39 for additional data segmentations.

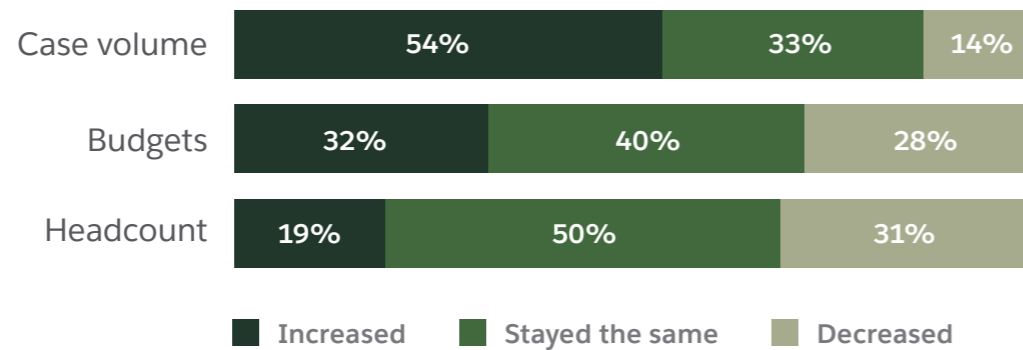


02

Agent Agility is Key as Demand Surges

Resources Are Generally Stagnant as Workloads Rise

Changes to the Following During the Pandemic



Service Professionals Who Describe Customers as the Following During the Pandemic



Agents have considerably expanded flexibility, means of communication, and success measures to improve customer experiences. But the increased demand for customer service isn't being met with increased resources as businesses take a hard look at their budgets amid economic uncertainty. In fact, as the majority of organizations experience a higher number of service and support cases, budgets and headcount are largely flat or down.

75% of service professionals say managing case volume has become more challenging during the pandemic.

Agents aren't just facing an influx of cases. They're facing more complex cases with anxious customers who are harder to satisfy.

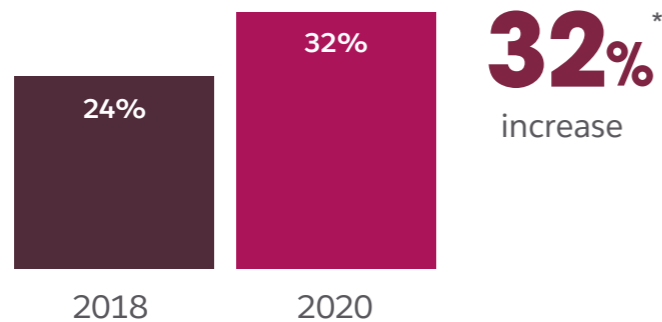
See page 38 for additional segmentations.

02

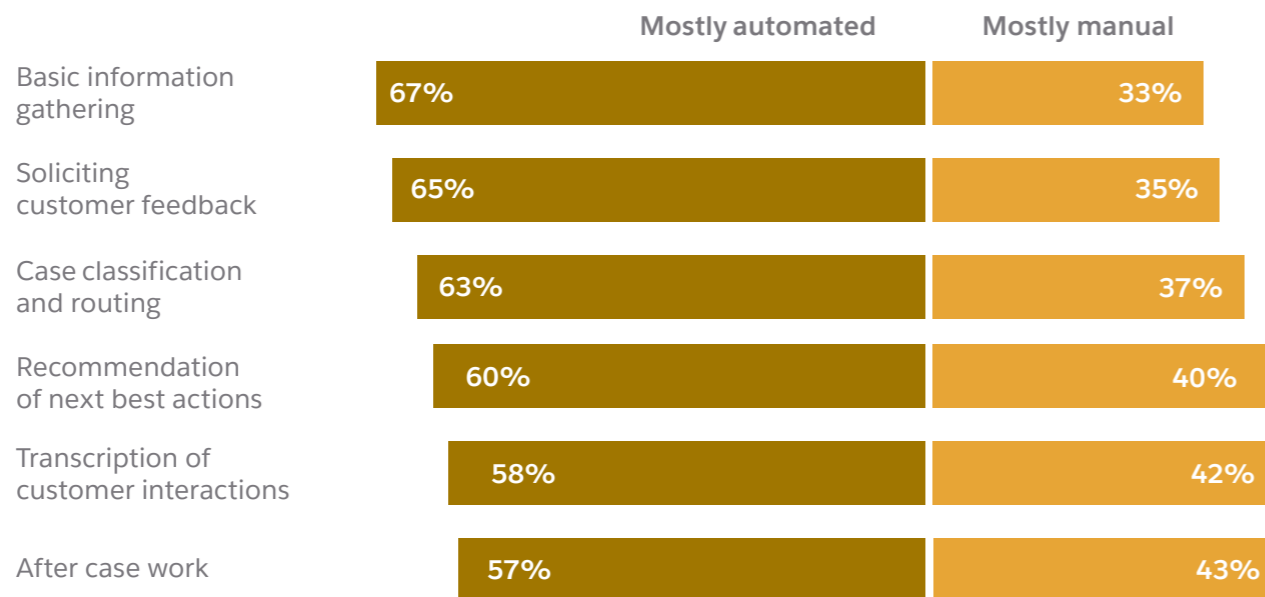
Agent Agility is Key as Demand Surges

Teams Turn to Automation and AI to Boost Productivity

Decision Makers Who Say Their Organizations Use AI



Service Professionals Who Describe the Following Activities as Mostly Automated or Manual



* Year-over-year growth rate is calculated with the formula (new value-old value)/old value. See page 42 for additional segmentations.

Automation may help teams find relief from the increased demands of customer service amid crises. Repetitive tasks such as collecting basic information and logging activities can have a dual effect of frustrating customers while suppressing agent productivity. Today, the majority of service professionals describe procedures such as gathering basic information and customer feedback as mostly automated.

Artificial intelligence (AI) is often the “how” of automation, working behind the scenes to raise insights and recommendations, populate information, or trigger processes. Since 2018, the share of service decision makers reporting AI use has risen by approximately one-third.

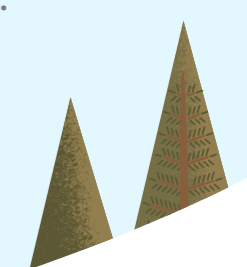
77% of agents say automating routine tasks allows them to focus on more complex work – up from 69% in 2018.



SPOTLIGHT | Self-Service and Chatbots Lend a (Virtual) Hand

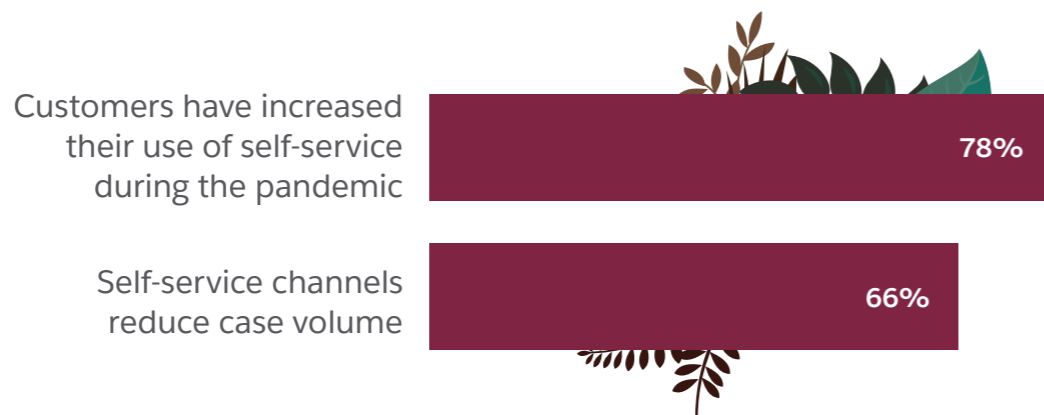
Another popular tactic for relieving agents of high-volume, low-complexity cases is deflecting them in the first place. **Nearly four in five service professionals say they've noticed an uptick in self-service during the pandemic, and nearly two-thirds credit it with easing case volume.**

Knowledge base articles and community forums might first come to mind when thinking of self-service, but they are increasingly joined by a more sophisticated tool: chatbots. Service organizations have increased their adoption of chatbots – which are often powered by AI – by nearly two-thirds since 2018.

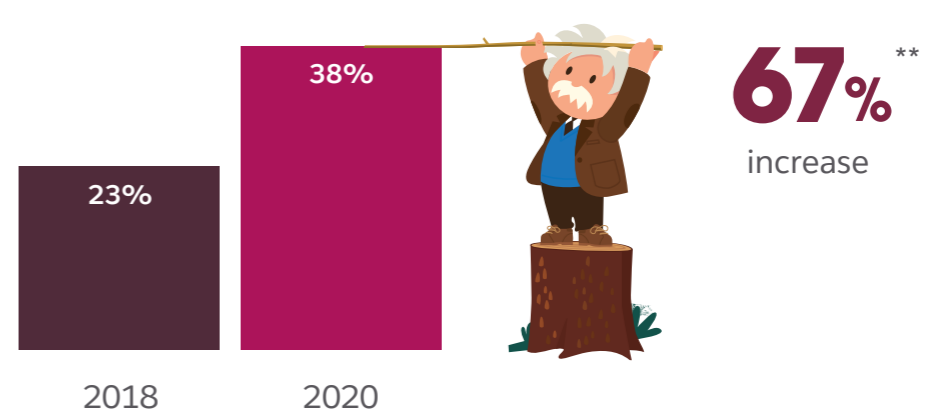


A Surge in Chatbot Adoption Scales the Impact Self-Service

Service Professionals Who Agree With the Following



Decisions Makers Who Say Their Organizations Use Chatbots



65% of customers prefer self-service for simple matters.*

* "State of the Connected Customer," October 2020. See page 41 for additional data segmentations.

** Year-over-year growth rate is calculated with the formula (new value-old value)/old value.

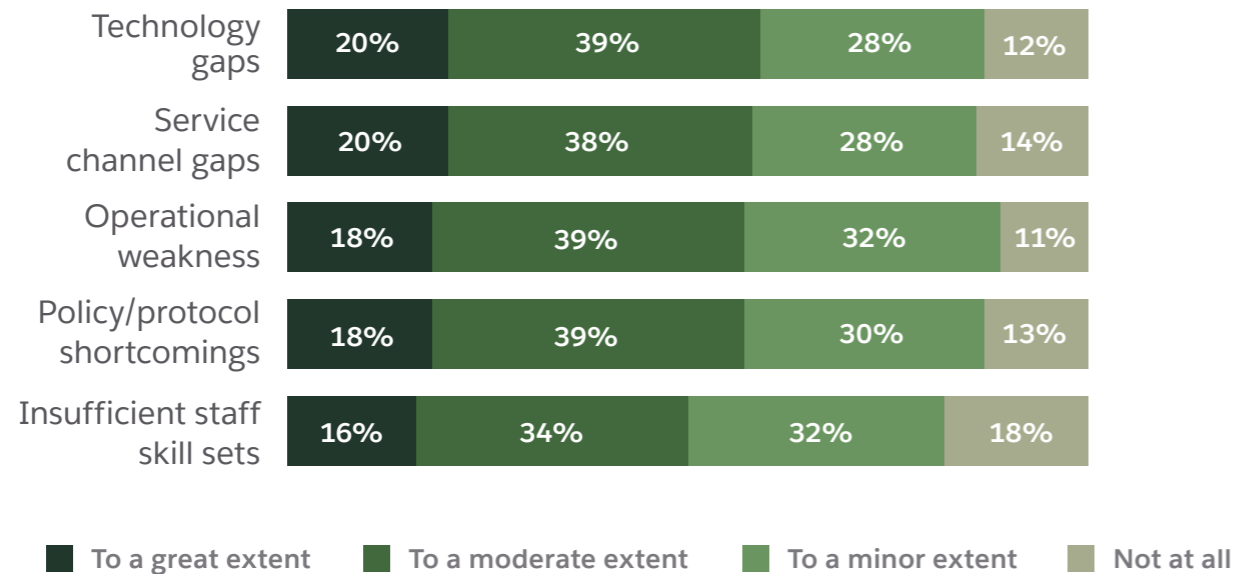


02

Agent Agility is Key as Demand Surges

Crises Prompt a Focus on Agility and Resilience

Degree to Which COVID-19 Has Exposed the Following



Fifty percent or more of service professionals say the pandemic has exposed moderate or greater gaps or shortcomings across a variety of factors. Technology stands out as having the most room for improvement, but the current state of service channels, operations, and skill sets have also proven inadequate for an unexpected jolt to business.

Decision makers have a heightened appreciation for the role of data in identifying what, when, and where resources can and should be allocated as conditions shift. **Seventy-four percent of decision makers say they are more reliant on data than they were prior to the pandemic.**

Still, organizations have a long way to go in building the agile business units that can quickly adapt to whatever comes next. **Thirty percent of decision makers excel at using data to make strategic business decisions.**



03

Service Extends to Sales, Marketing, and Beyond

Customers view a company as a whole, rather than as individual departments. When they have a disjointed customer journey, it can leave them in search of a competitor. **Seventy-six percent of customers expect consistent interactions across departments, but 53% say it generally feels like sales, service, and marketing don't share information.***

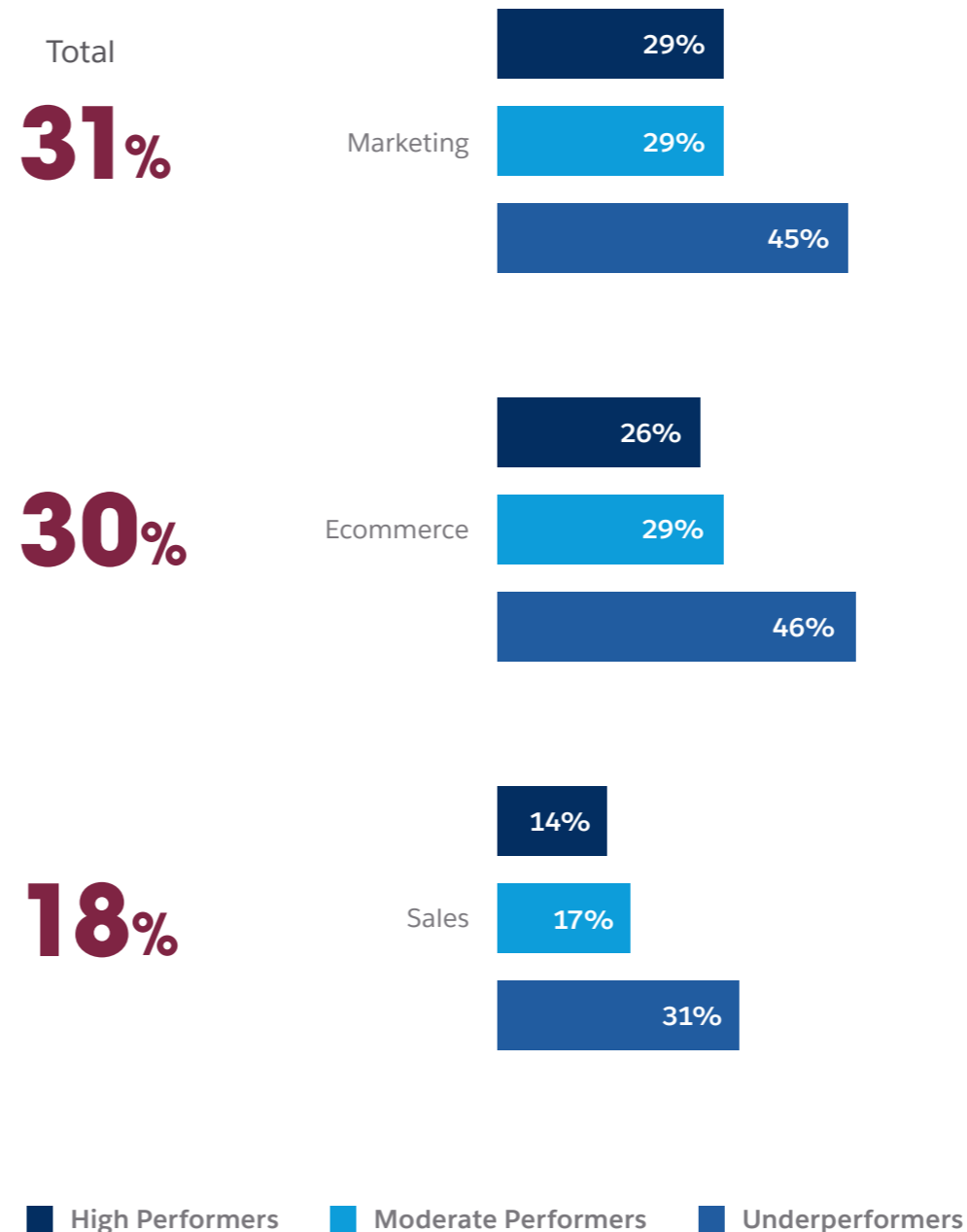
The starting point for providing the connected experiences customers demand are coordinated teams. Over two-thirds of high performers report alignment across marketing and ecommerce, with even greater alignment (82%) with sales. Underperformers, however, are far more likely to report misaligned organizational structures.

88% of service teams share common goals and metrics with sales teams – up from 81% in 2018.

* "State of the Connected Customer," October 2020.

Underperformers Are More Siloed Than Their Competitors

Service Professionals Who Say They Are Siloed From the Following Organizations



Base: Service professionals whose company has the following team.



03

Service Extends to Sales, Marketing, and Beyond

Shared goals and metrics are a baseline for providing the experiences customers expect, but service professionals realize that a customer’s experience is influenced by more than their service interactions.

79% of service professionals say it’s impossible to provide great service without a complete view of customer interactions.

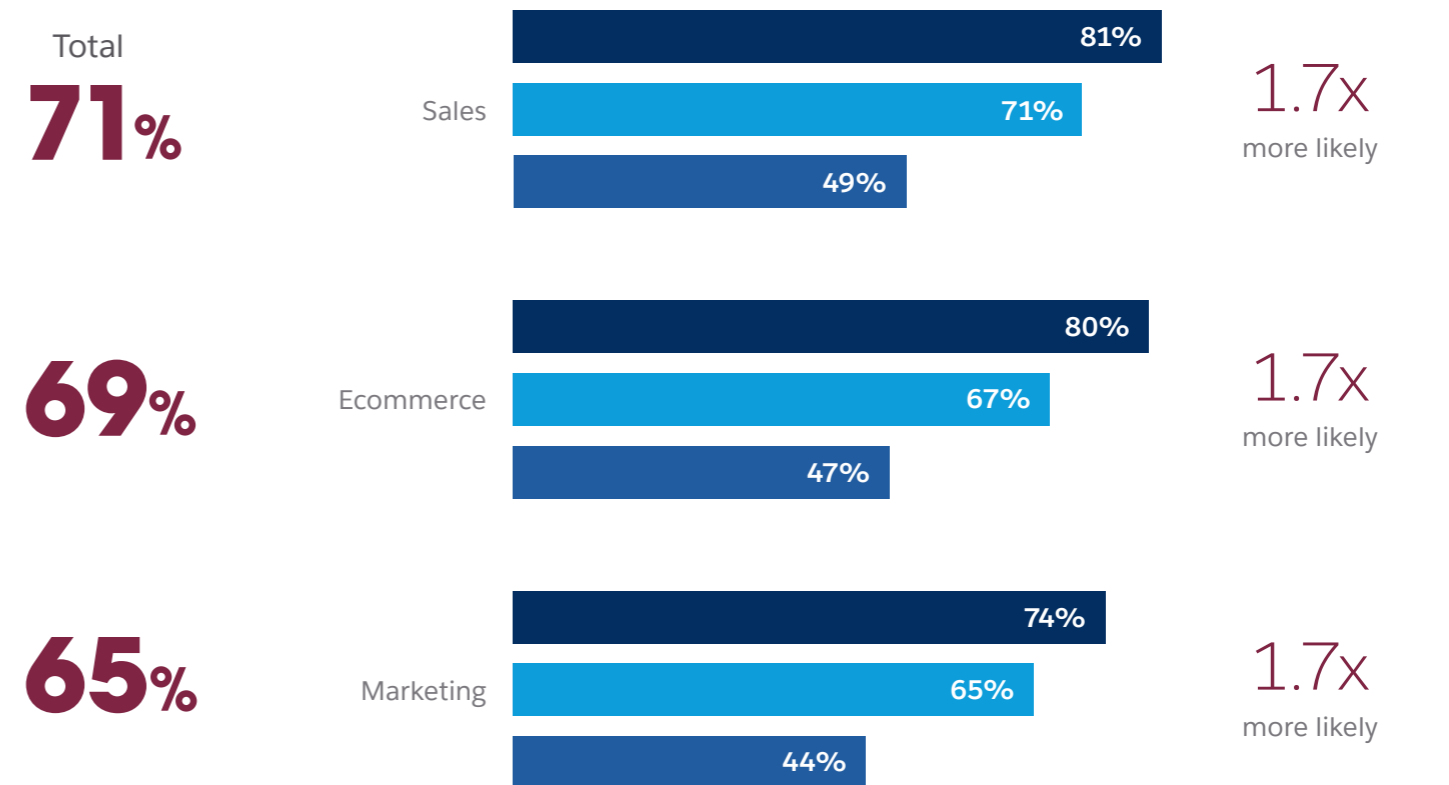
The majority of service organizations now provide their team members with a view of customer interactions across sales, ecommerce, and marketing, although most underperforming organizations have yet to achieve this. **Eighty-three percent of service organizations use the same CRM system as their marketing and sales colleagues.***

Distilling all this information for agents remains a sticking point. Just under half (48%) of agents say they can find what they need on a single screen, although this is up from 44% in 2018.

* Base: Respondents using a CRM system.

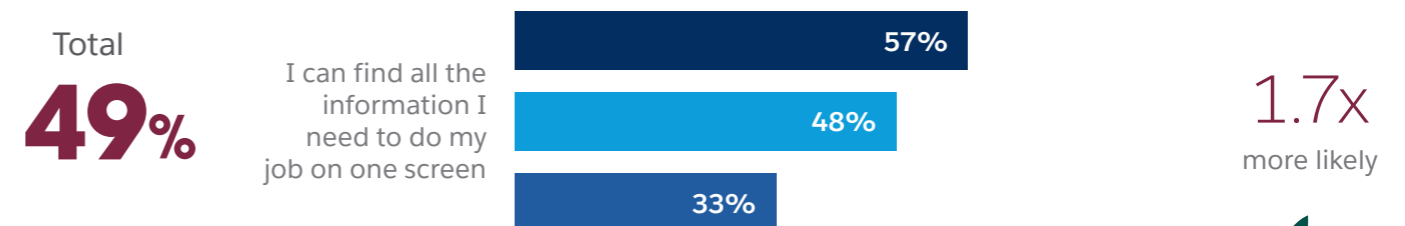
Top Teams Lean on a Holistic Customer View

Agents Who Say They Have a Complete and Accessible View of the Following Customer Interactions



Base: Agents whose company has the following team.

Agents Who Agree With the Following



■ High Performers ■ Moderate Performers ■ Underperformers





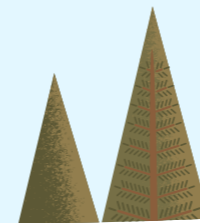
SPOTLIGHT | IT Partnerships Underpin Service Transformation

As service becomes increasingly digital and connected experiences more expected, partnerships with IT are critical. **Eighty-eight percent of decision makers call IT a strategic partner.**

For most service organizations, technology strategy and selection is a joint effort with IT. In a sign of how important a confidant IT has become in a digital-first world, a mere 6% of decision makers say their technology decisions are made without IT involvement.

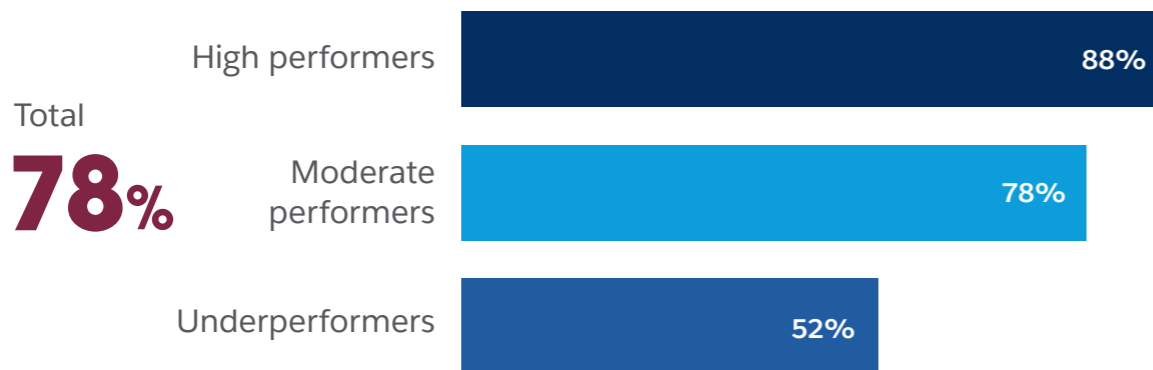
As digital strategies solidify and investments continue, the technology-driven aspect of service employee experiences has improved significantly.

77% of agents say they have the tools and technology they need to do their jobs – up from 69% in 2018.



Service Toolkits Become More Robust as IT Partnerships Solidify

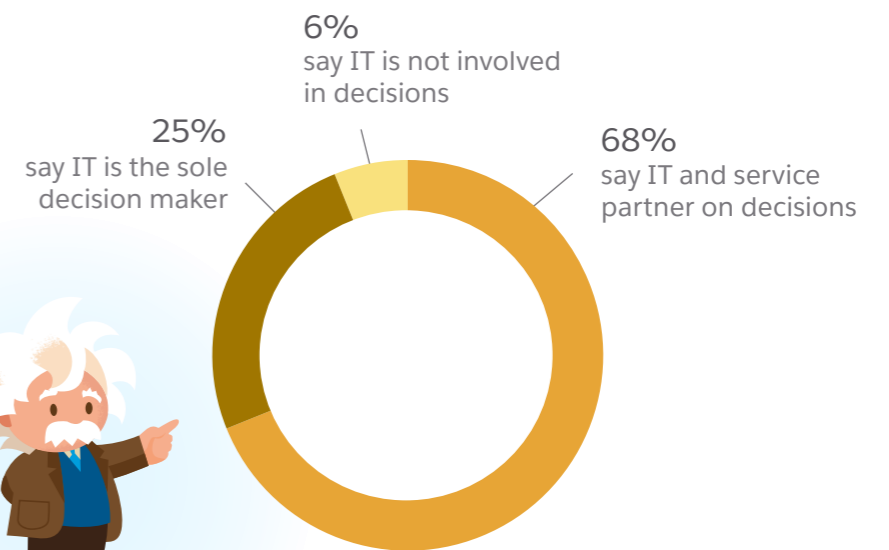
Service Professionals Who Say Their Agents Have All the Tools and Technology They Need



High performers vs. Underperformers

1.7x more likely

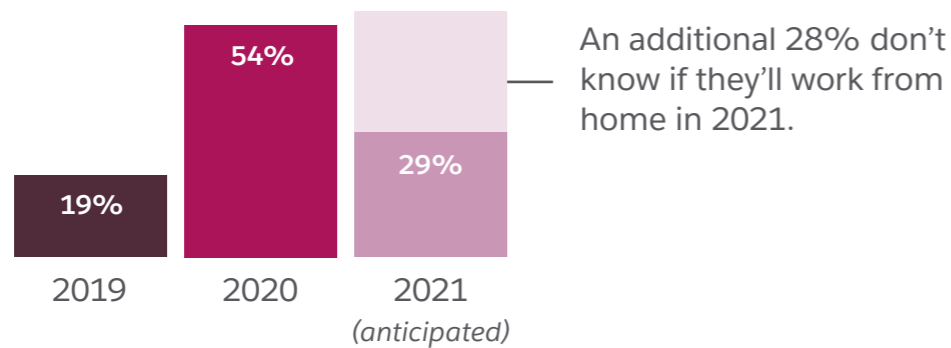
How Decision Makers Describe IT's Involvement in Service Technology Decisions



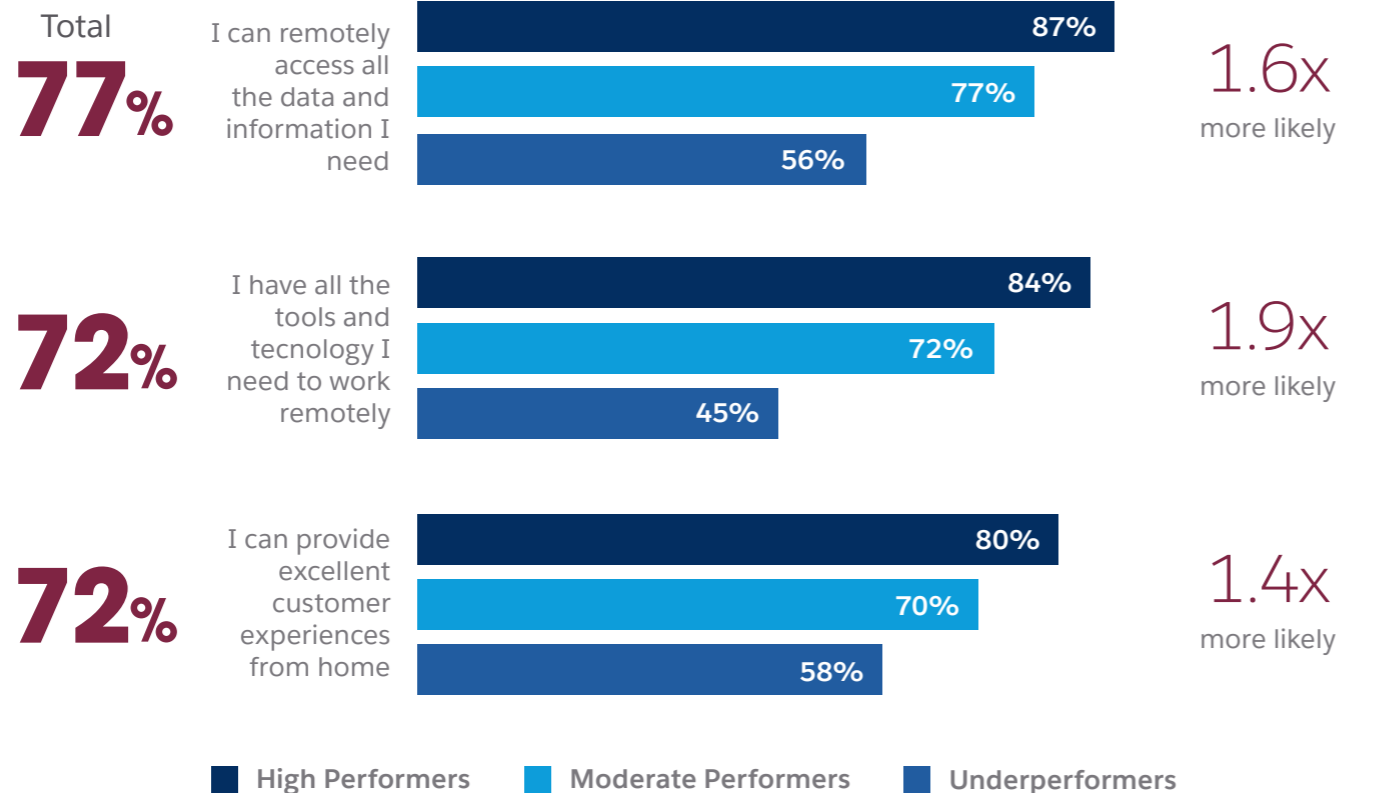
04 Workforce Management Takes a New Shape

Service Teams Remain Connected Despite Being Largely Distributed

Service Professionals Working From Home



Agents Who Agree With the Following



Customer service, IT, and virtually every other team around the world are navigating an extraordinary and unexpected mass shift toward remote work. At the time of our survey, over half of service professionals around the world were working from home – nearly three times as many who did so in 2019. What’s more, the majority either expect to work remotely into 2021 or remain uncertain about their future work setting.

Despite their new realities, service professionals are generally satisfied with the quality of service they’re able to provide outside of the store, office, or contact center. Sizable majorities also claim access to the technology and information they need to effectively do their jobs regardless of where they are, with high performers particularly plugged in.

Trailblazer Story

Digital Transformation Helps VIZIO Easily Pivot to Remote Work in Times of Crisis

VIZIO is the leading HDTV and sound bar brand in North America with over 70 million customers with a simple customer service mission: to help people.

When service leaders started to hear about potential shelter-in-place orders, they took a proactive approach to setting up work-from-home environments for a team of 380 agents that ensured everyone felt connected and supported.

A 2019 transition to a new service console provided a simple, contextual view, an intuitive interface, and an embedded knowledge base to help resolve cases quickly in an at-home environment. By providing service across digital channels like chat, SMS, social, and self-service, VIZIO was able to maintain support even as the health crisis impacted its outsourced call center.



15%

Decrease in average handle time



4x

Agent productivity on chat vs. phone



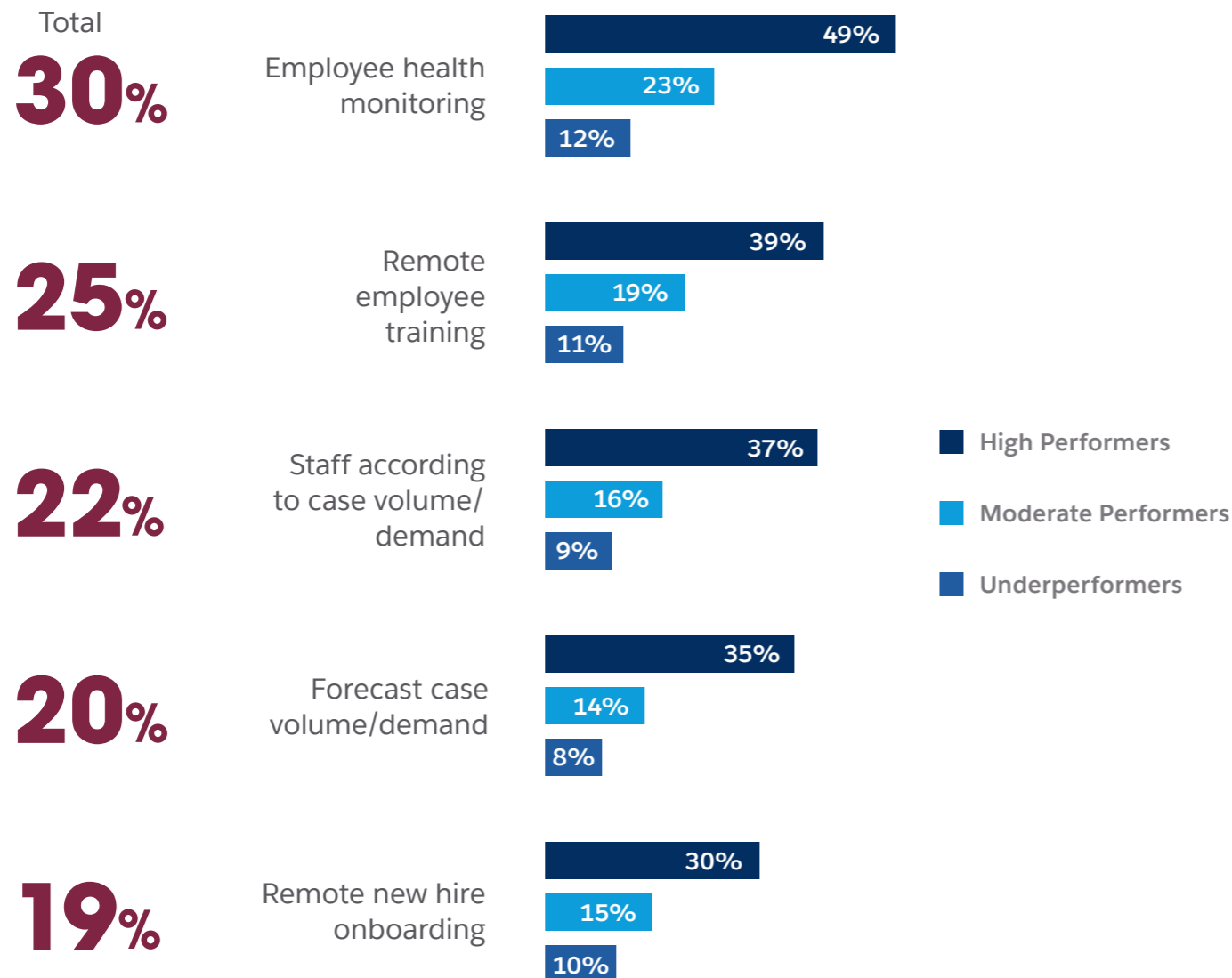
VIZIO

04

Workforce Management Takes a New Shape

Teams Struggle to Adapt to a New Normal

Service Professionals Who Say Their Organizations Excel at the Following



Managing remote employees during the pandemic is not without its challenges, of course. Few service professionals, for example, say they excel at training employees remotely, let alone onboarding new ones.

Businesses that have reopened their physical spaces to employees – or that never closed in the first place – face a different set of obstacles. Considering that “social distancing” and “contact tracing” were foreign concepts for most people at the beginning of 2020, it’s not surprising that few organizations have cracked the code on worker safety and outbreak remediation.

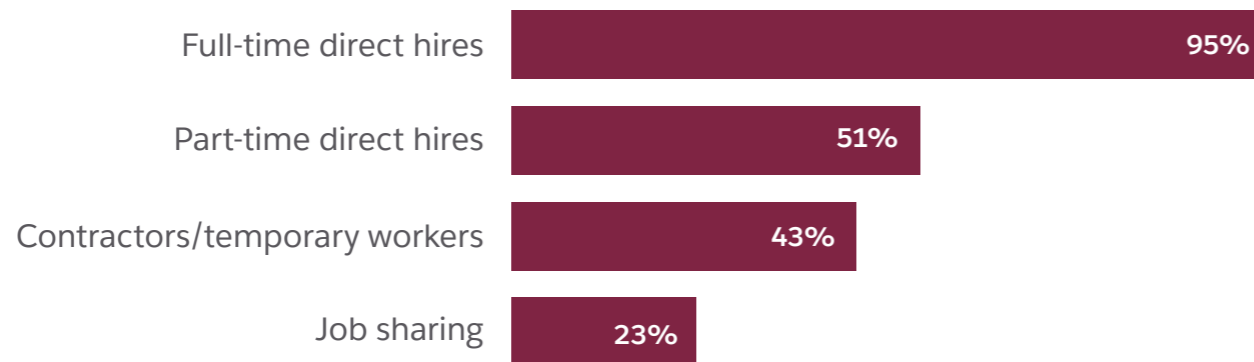
High performers are, like with most measures, more confident in their capabilities in this area. It’s notable, however, that even they are not likely to claim mastery, except when it comes to social distancing.

04

Workforce Management Takes a New Shape

Staffing Models Evolve Beyond Direct Hires

Decision Makers Who Say They Have the Following Staffing Models



As the very nature of work evolves before their eyes, service leaders are looking to new staffing models that accommodate new fiscal realities, provide employee mobility and opportunity, and meet business demands.

Although hiring full-time employees remains the default method, over half of teams have part-time staff, as well. As service needs fluctuate, 43% of teams are employing contractors or temporary workers.

Against a backdrop of closed stores, idled production lines, and other crisis-driven business developments that have sidelined workers, many service organizations are fulfilling staffing needs at least in part by bringing in help from other departments.

62% of service organizations have brought employees from other departments into service and support roles.

See page 38 for additional segmentations.

05

Career Paths Come Into Focus

In 2018, service leaders told us how their departments, historically viewed as cost centers, were transitioning into strategic assets for their companies. In an economic crisis in which customer retention is paramount, the value of great customer service is becoming even clearer. Nearly four out of five agents appreciate the impact of their work on the business, and nearly as many see greater appreciation from management, as well.

In addition to their central role in keeping customers happy, the trend of service teams functioning as new and valuable sales channels means they are increasingly held in high esteem, particularly at high-performing organizations.

High performers are 81% more likely than underperformers to incentivize agents to upsell.*

* Year-over-year growth rate is calculated with the formula (new value-old value)/old value.

Service Gets a Bigger Seat at the Table

Service Professionals Who Say Management Is More Appreciative of Service's Strategic Value During the Pandemic

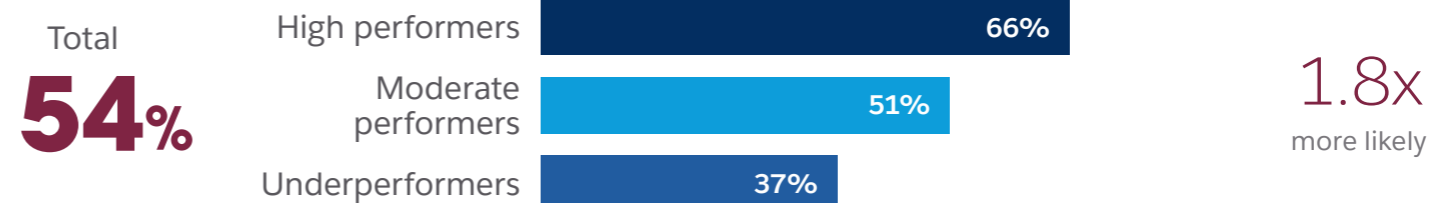
High performers vs. Underperformers



Agents Who See a Direct Link Between Their Work and Business Performance



Agents Who Say They Are Incentivized to Upsell to Customers



05

Career Paths Come Into Focus

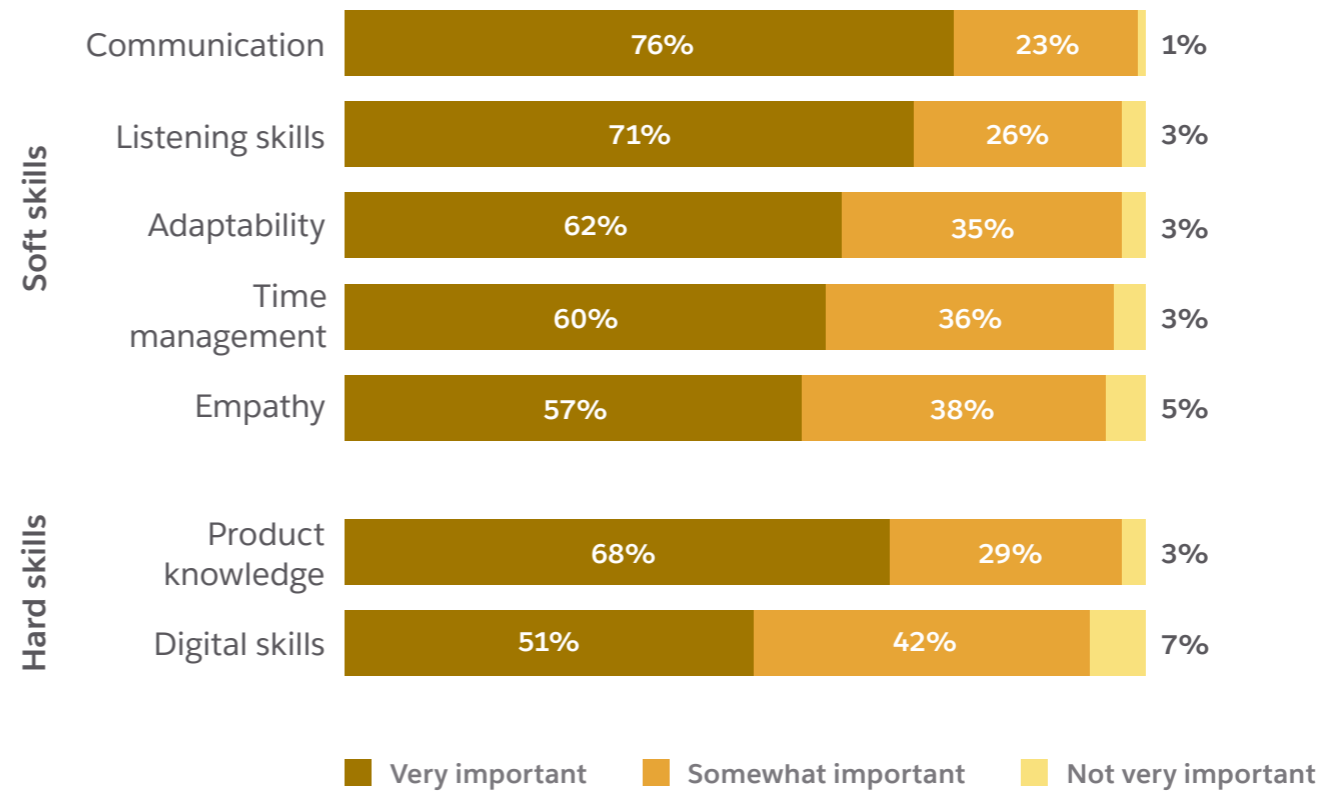
The skills required of agents are becoming broader and more complex than those traditionally associated with the role.

77% of agents say their role is more strategic than two years ago – up from 71% in 2018.

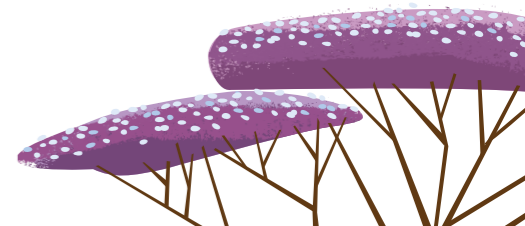
Hard skills such as product knowledge and digital literacy are highly valued, a nod to the importance of agents acting as trusted advisors with necessary know-how and catering to an increasingly online service landscape. Ultimately, however, those skills are continually honed as offerings and technologies develop. Soft skills are also in demand, such as communication, adaptability, and empathy.

Soft Skills Are Prized as Service Teams Broaden Their Scope

Importance of Skills for Service and Support Staff



See page 43 for additional data segmentations.



05

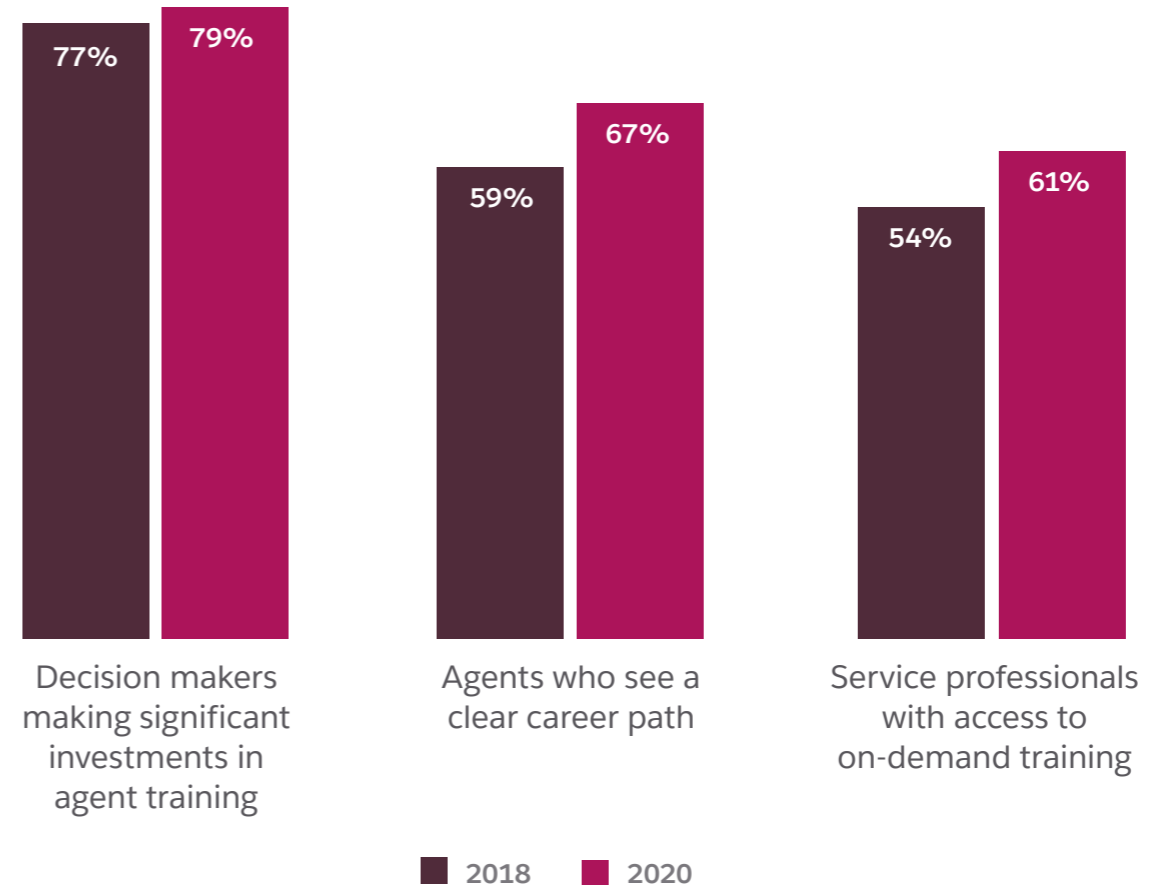
Career Paths Come Into Focus

Tasked with changing and more complex responsibilities as well as an uncertain business and customer landscape moving forward, service organizations are continuing to invest in tools and programs to empower staff with the skill sets their evolving roles require.

55% of agents say they need better training in order to do their jobs well.

Adoption of on-demand training capabilities that allow service professionals to learn wherever and whenever suits them has seen a significant rise in tandem with the share of agents with a clear career path.

Investment in Training and Rising Career Prospects Persist amid an Economic Downturn



See page 43 for additional data segmentations.





SPOTLIGHT | Representation Matters

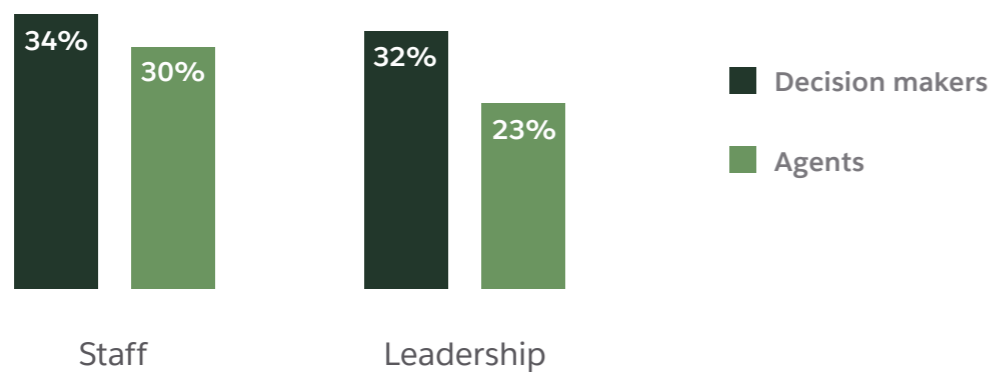
As persistent inequalities – particularly around systemic racial injustices – come to the forefront of national dialogues, companies are being called on to take a stand on equality, starting in their own workplaces. Many brands have taken prominent and unequivocal stands in support of underrepresented minorities, recognizing it as not only the right thing to do, but as part of their commitment to meeting customer expectations.

88% of customers believe companies are responsible for hiring a workforce that reflects their communities.*

Ultimately, actions speak louder than words, and service organizations – like other business units – have work to do as they pursue a more equal future. Barely one-third of service professionals claim excellent diversity among staff, with even fewer saying the same for leadership. Individual contributors give an even more scathing assessment than do managers, particularly when it comes to representation in senior positions.

Service Organizations Have a Diversity Problem

Service Professionals Who View Their Organizations' Diversity as Excellent



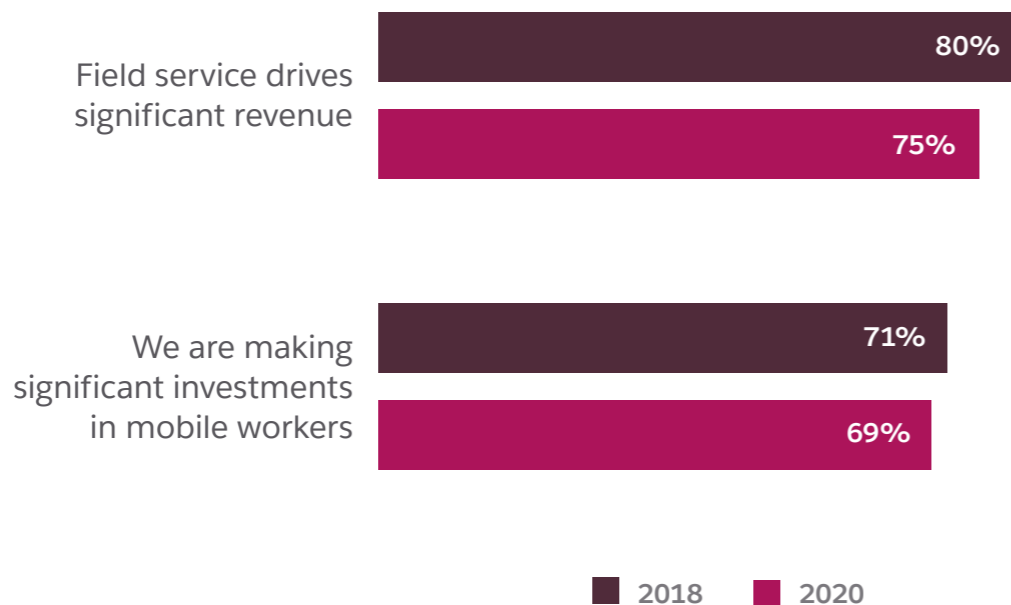
* "State of the Connected Customer," October 2020.

06

Field Service Evolution Drives Revenue

Field Service Investments Continue Despite a Pandemic

Decision Makers Who Say the Following*



* Base: Respondents at companies with field service. See page 44 for additional segmentations.

The growth of field service has been a major trend in customer service for several years, but a public health crisis has threatened to derail the trajectory of a function reliant on in-person engagement. Yet over two-thirds of consumers continue to seek service that comes to them.

70% of consumers say they still prefer in-person service appointments over alternatives.**

Following market demands, decision makers continue to be keen on the future of field service, with a negligible decline since 2018 in the ranks making investments in their mobile workers and only a slight decline in those who view them as major revenue drivers.

80% of decision makers say field service is a key part of their overall strategy.*

** Salesforce Consumer & Workforce Series, May–August 2020.

Trailblazer Story

Fike Heats Up Digital Program to Better Serve Customers

When COVID-19 struck, Fike rapidly accelerated its digital transformation plan and shifted entirely to remote work within two days.

Fike had already been on a six-month journey to implement a new field service solution, which would replace a complex, costly, and time-consuming system of technicians flying to on-site appointments where needed. This solution allowed Fike to match skill sets on top of opportunities created by dispatchers to schedule techs appropriately.

Because of COVID-19, Fike also implemented a solution that allows agents to easily implement a live, virtual video call to answer customer servicing needs in a remote-first world. Now, the company can connect master technicians and trainers with on-site technicians to remotely train and solve issues through video, AR measurements, digital diagrams, and more.



90%
Reduction in
travel costs



70%
Reduction in
customer service costs



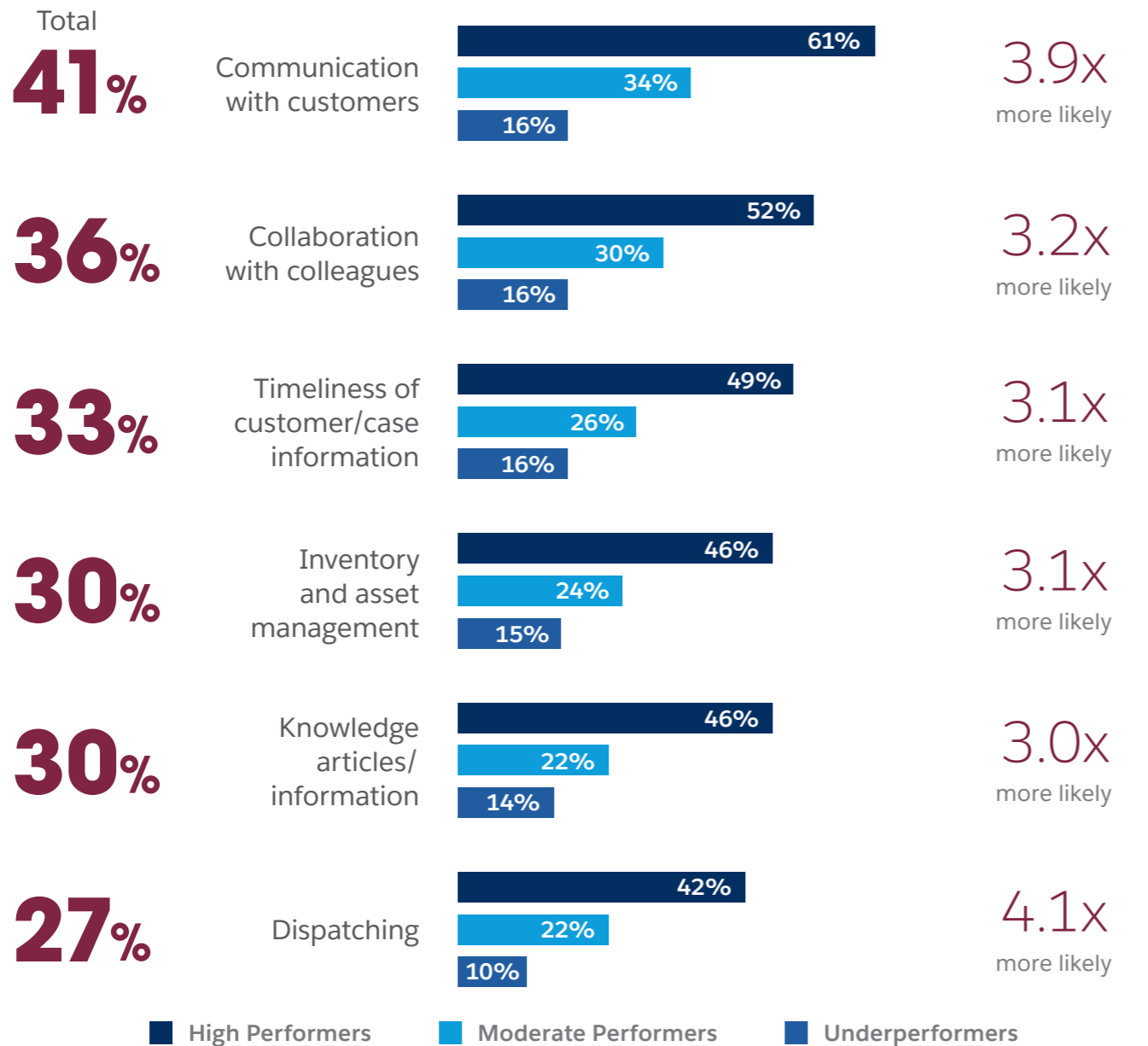
Fike[®]

06

Field Service Evolution Drives Revenue

Field Service Capabilities Come Under Scrutiny

Mobile Workers Who Say Their Organization Excels at the Following*



* Base: Respondents at organizations with field service.

In an era of on-demand information and communication, field service has evolved from its origins of appointment windows and nameless technicians. Mobile workers and dispatchers are largely dependent on digital tools, but see extensive room for improvement across multiple capabilities, even on high-performing teams.

75% of mobile workers say field operations are connected to core service at their organization.





SPOTLIGHT | Protecting Each Other During a Pandemic

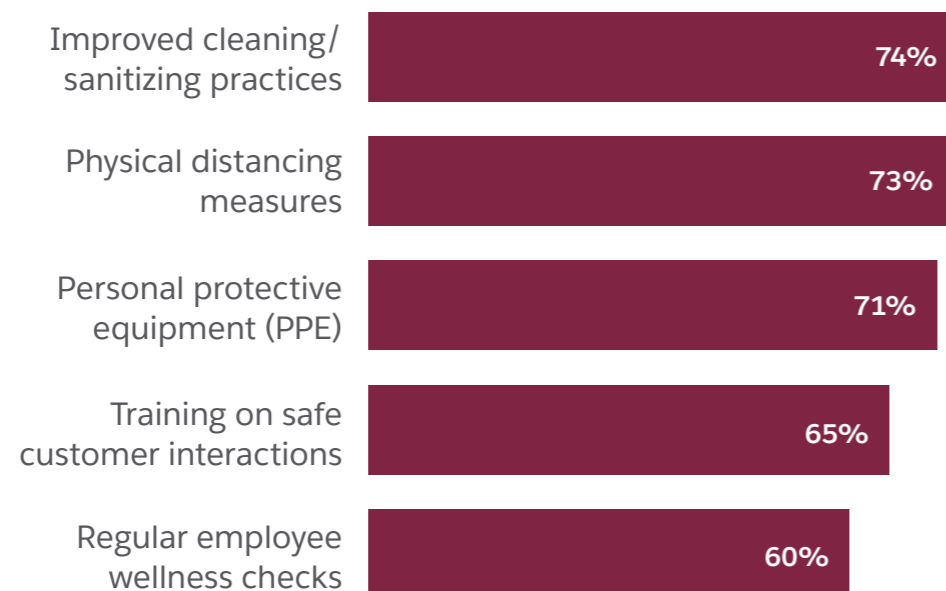
Mobile workers have, in many cases, been deemed essential by businesses and governments during lockdowns and restrictions. While much attention has been paid to the role these workers play in servicing basic needs and maintaining a baseline of economic activity, it's just as important to focus on the actions companies take to keep these workers and their customers safe.

Fortunately, the majority of mobile workers report sufficient actions by their employers in keeping them – and the customers they serve – healthy. What the future will bring remains to be seen, but like most other aspects of business and life, a return to the old normal is not likely.

80% of mobile workers say their employer has taken the necessary steps to keep them safe during the pandemic.

Employers Demonstrate a Commitment to Mobile Worker Health

Mobile Workers Who Say Their Employer Has Provided the Following During the Pandemic



68% of mobile workers believe the pandemic has permanently transformed field service.





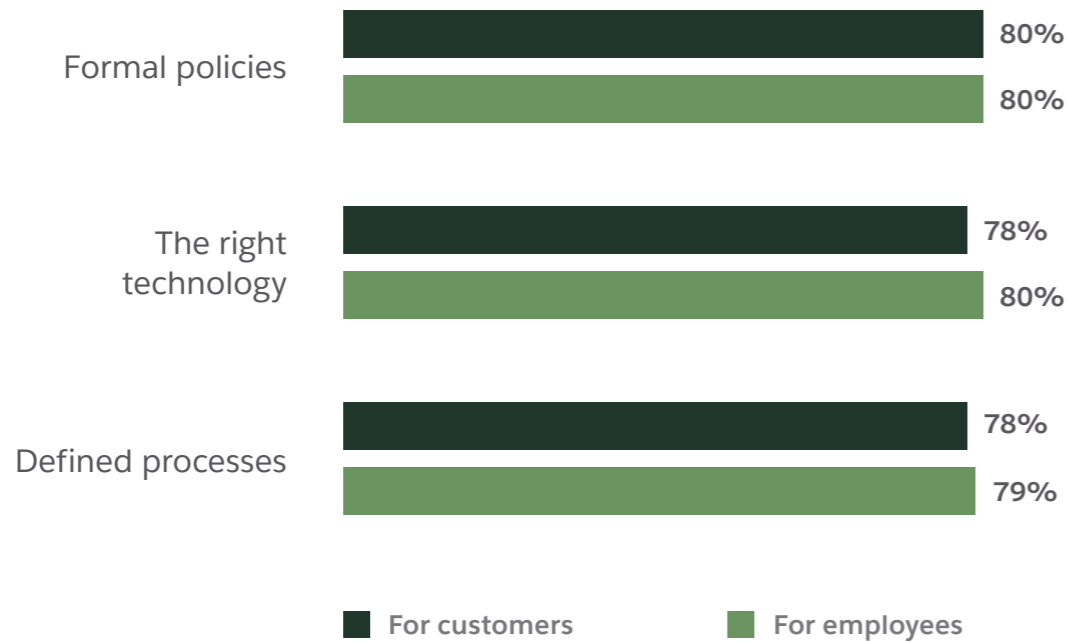
LOOK AHEAD | Making Service Inclusive and Accessible

The pandemic has underscored the importance of providing service from anywhere. It has also highlighted the importance of accessibility for all, regardless of visible or invisible disabilities. Yet while the majority of service

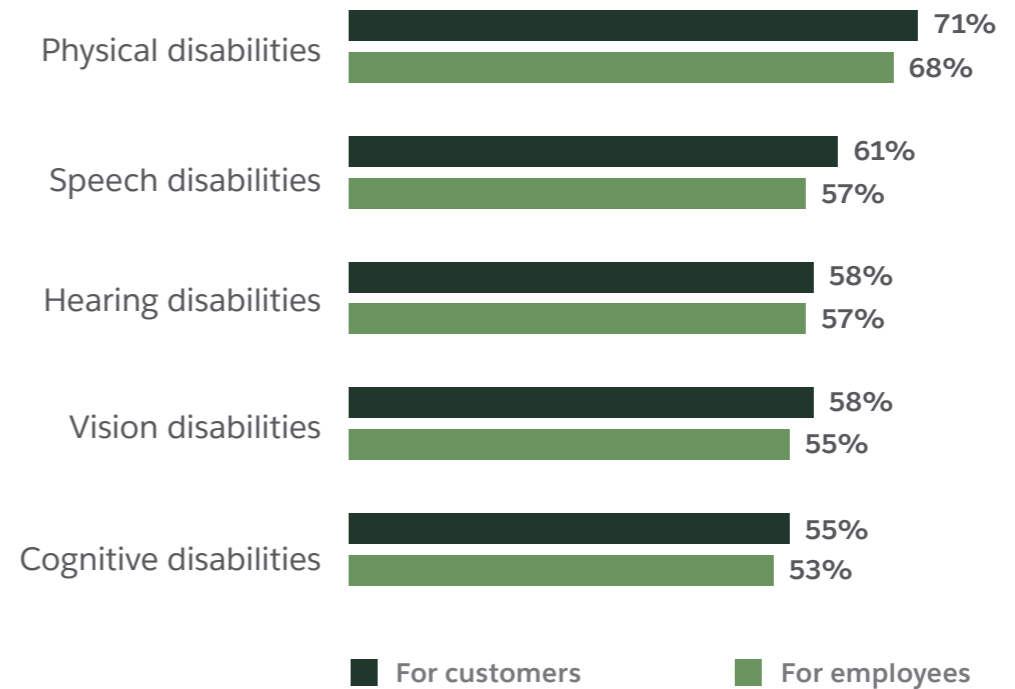
professionals claim to have accessible policies, processes, and technology for customers and employees alike, fewer see truly accessible service and careers in practice.

Despite Efforts, Customer and Employee Accessibility Remains Elusive

Service Professionals Who Say They Have the Following in Place to Ensure Accessibility for Customers and Employees



Service Professionals Who Say They Provide the Proper Accommodations For Customers and Employees With the Following

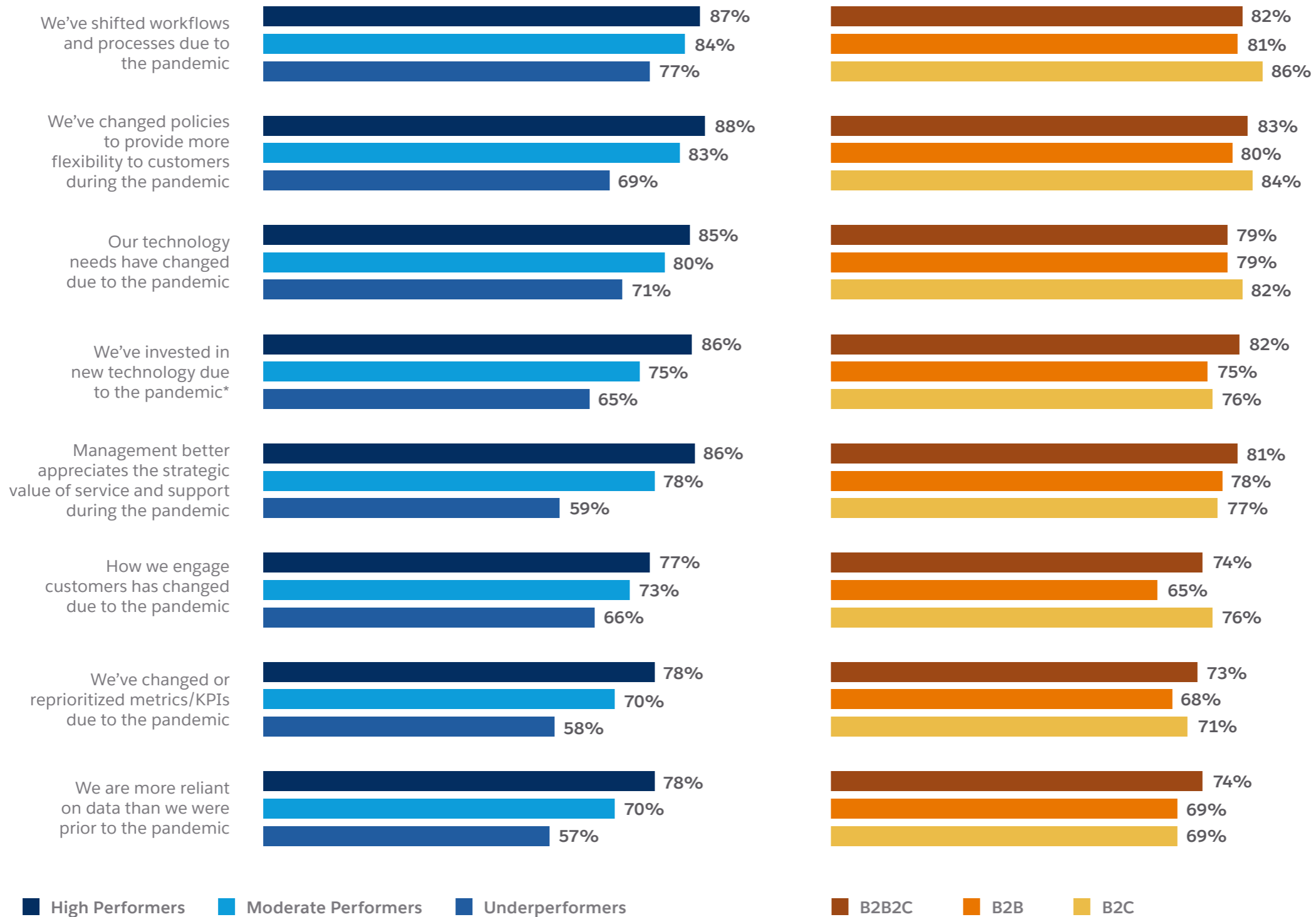


See page 45 for additional data segmentations.

APPENDIX



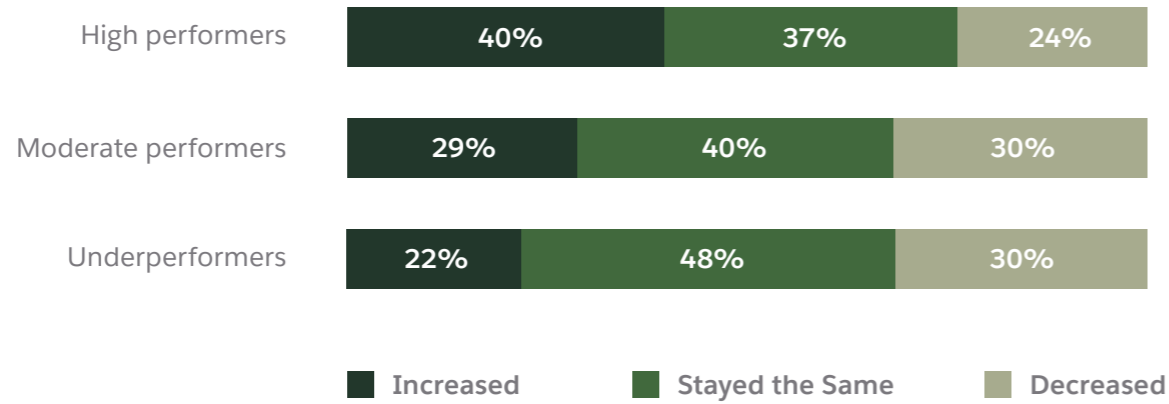
Service Professionals Who Agree With the Following Statements



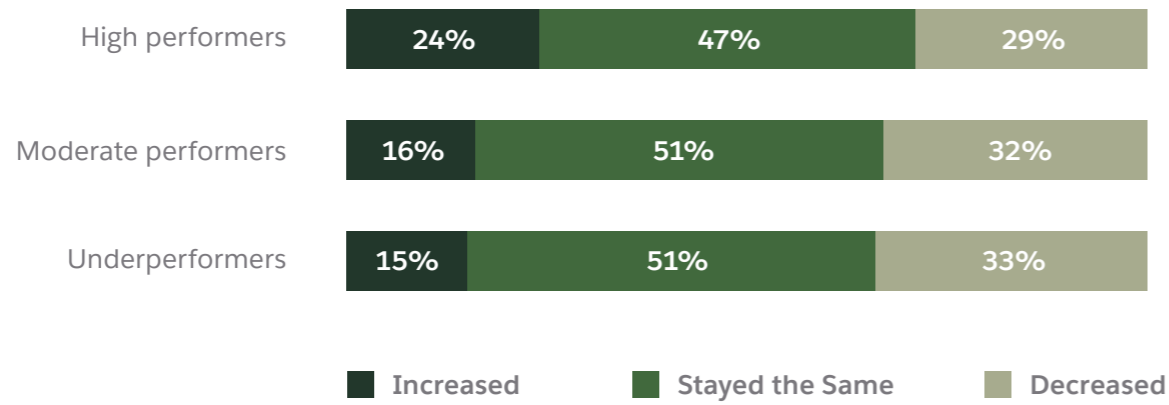
* Base: Decision makers.

Changes to the Following During the Pandemic

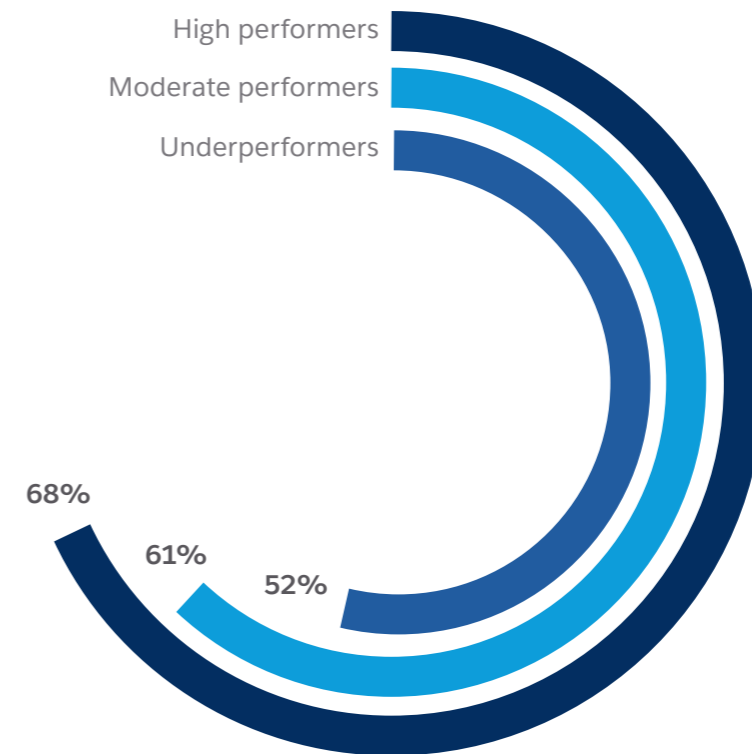
Budgets



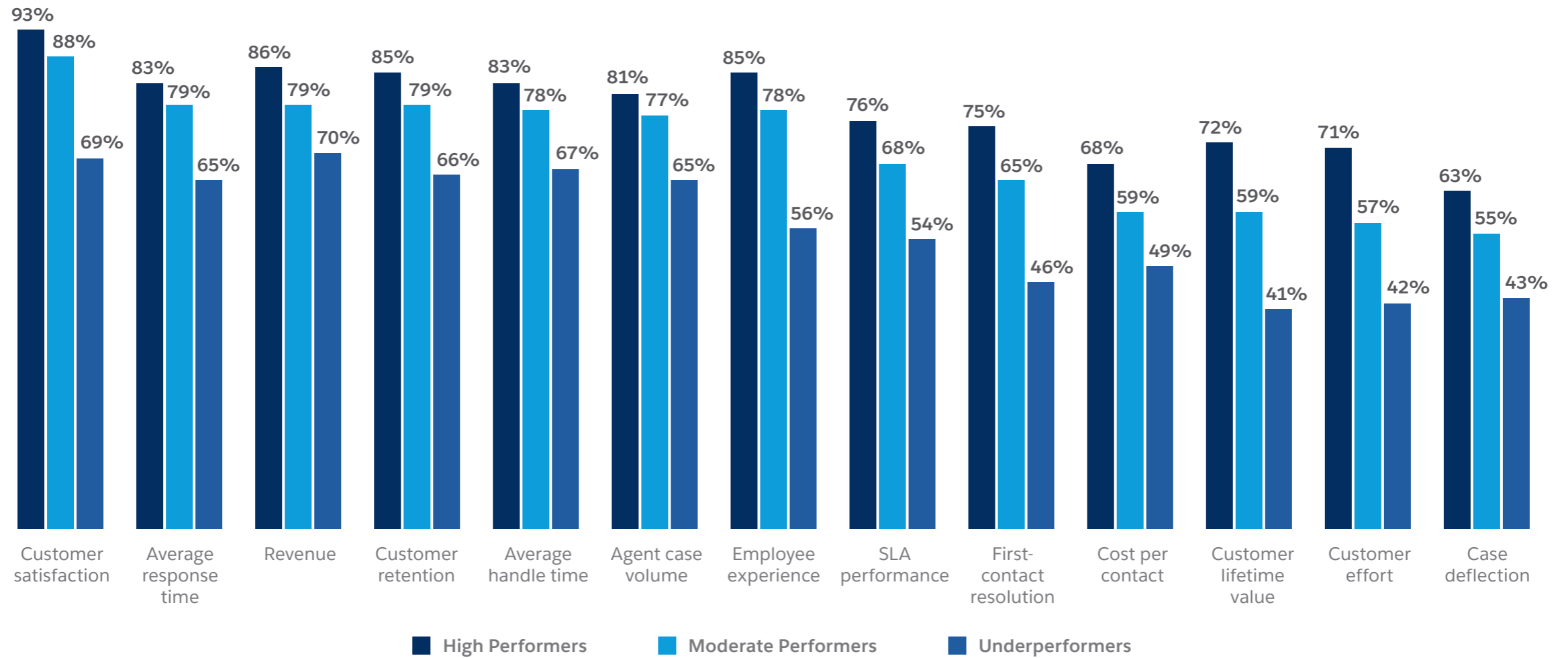
Headcount



Service Organizations That Have Used Labor From Other Departments During the Pandemic



Service Organizations That Track the Following Metrics

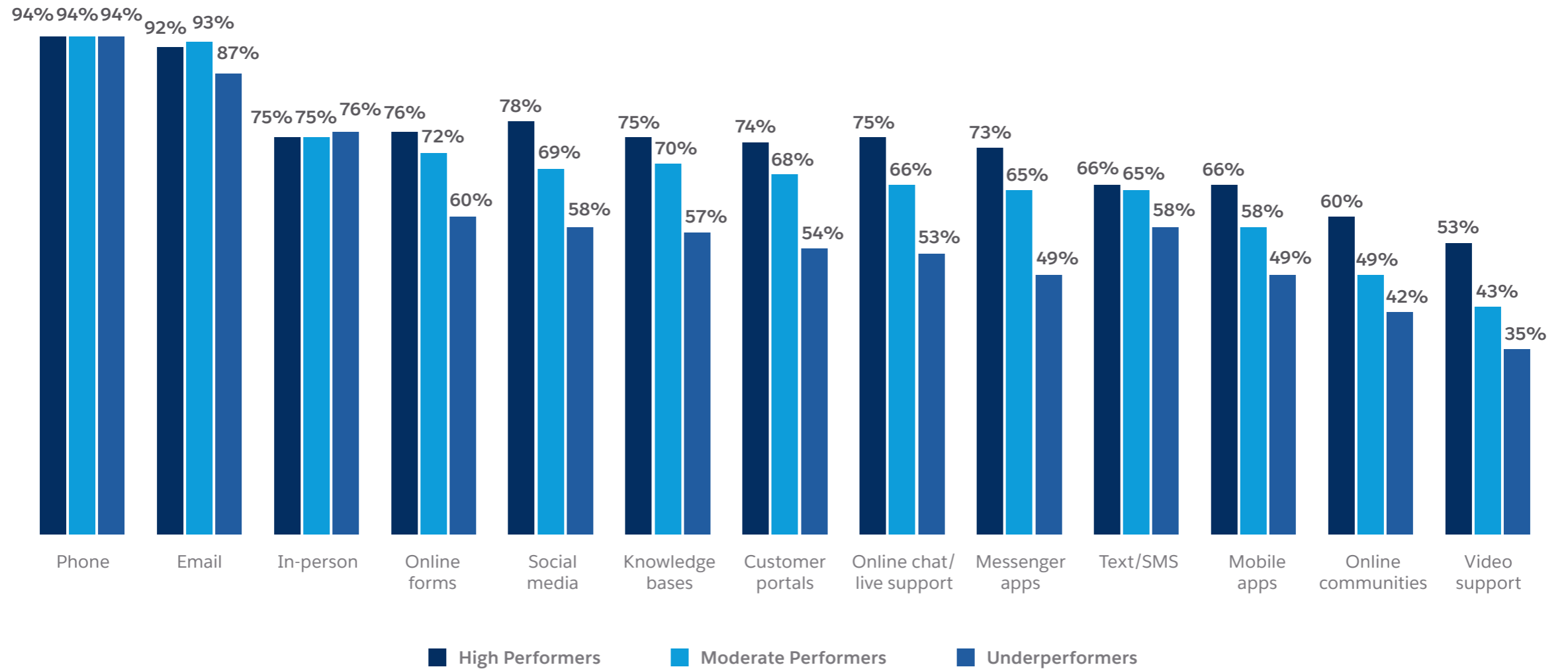


Five Most Important Service Key Performance Indicators*

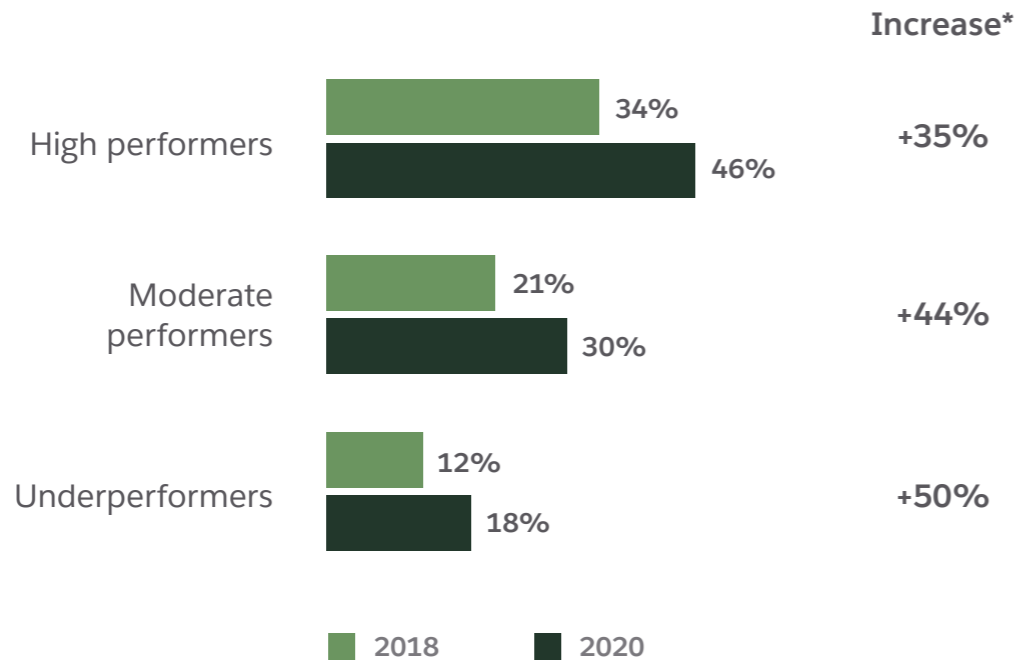


* Base: Respondents who track the corresponding metric.

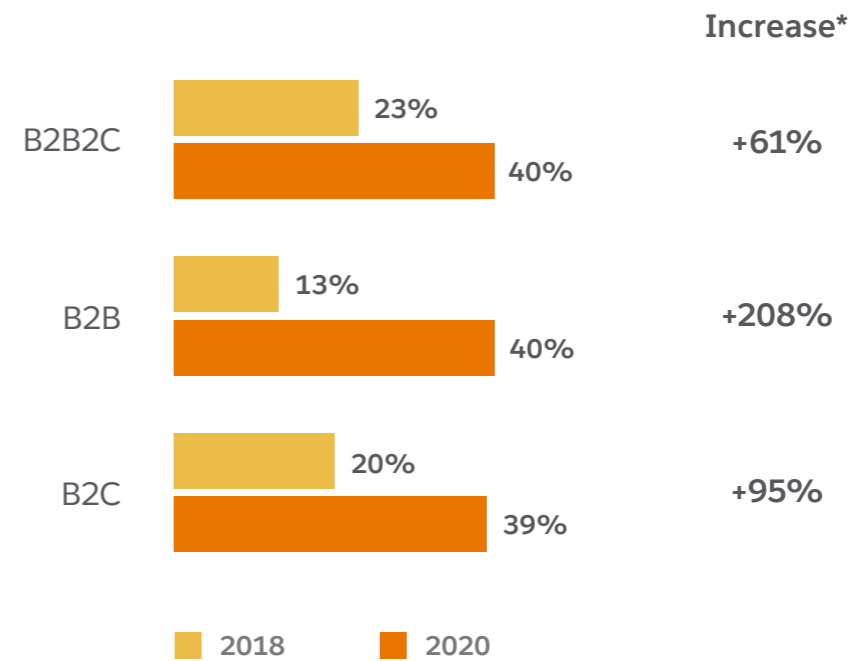
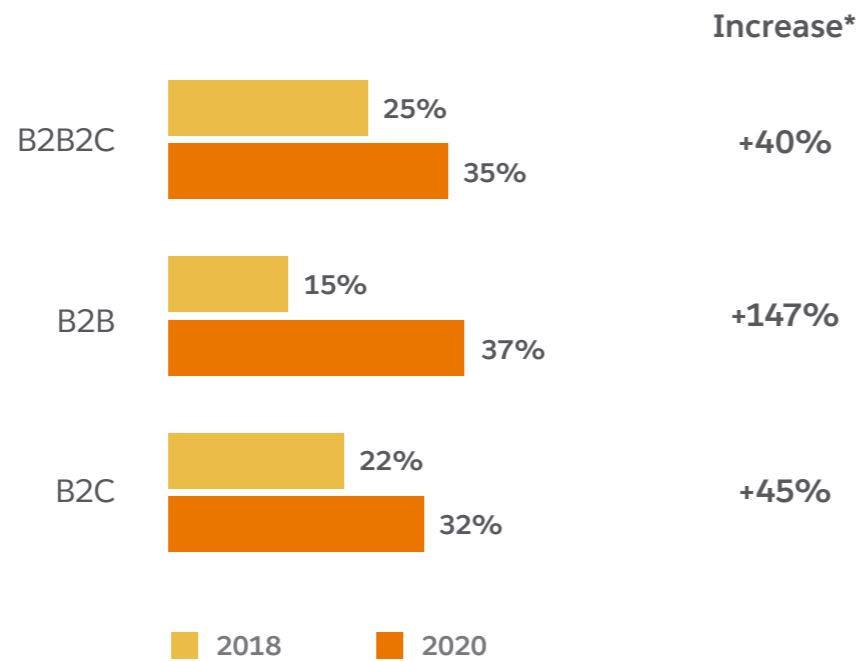
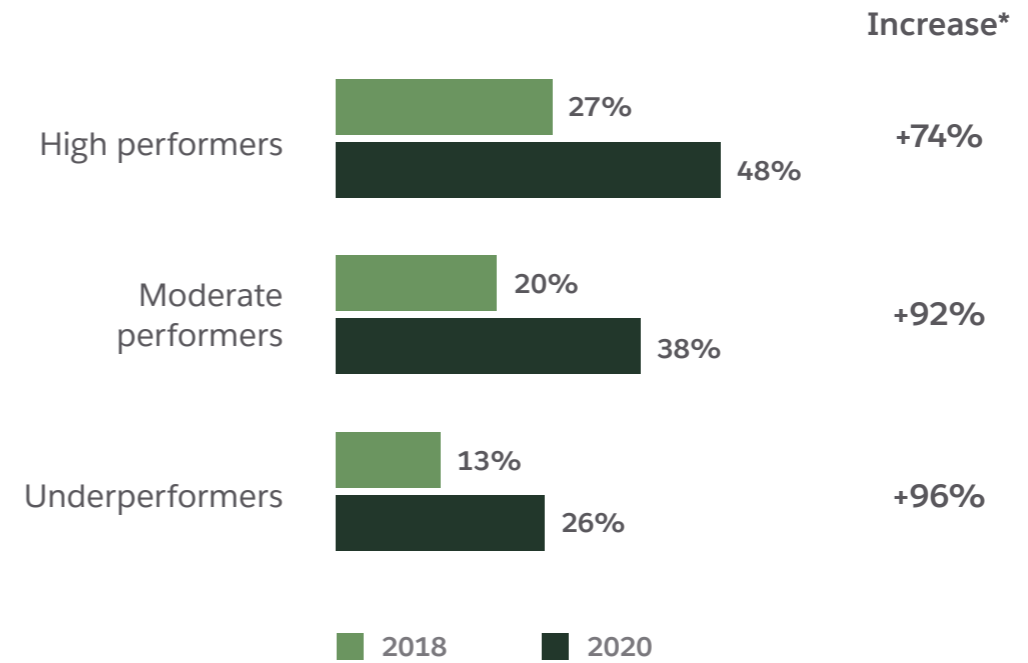
Service Teams That Report Using the Following Channels



Decision Makers Who Say Their Teams Use AI

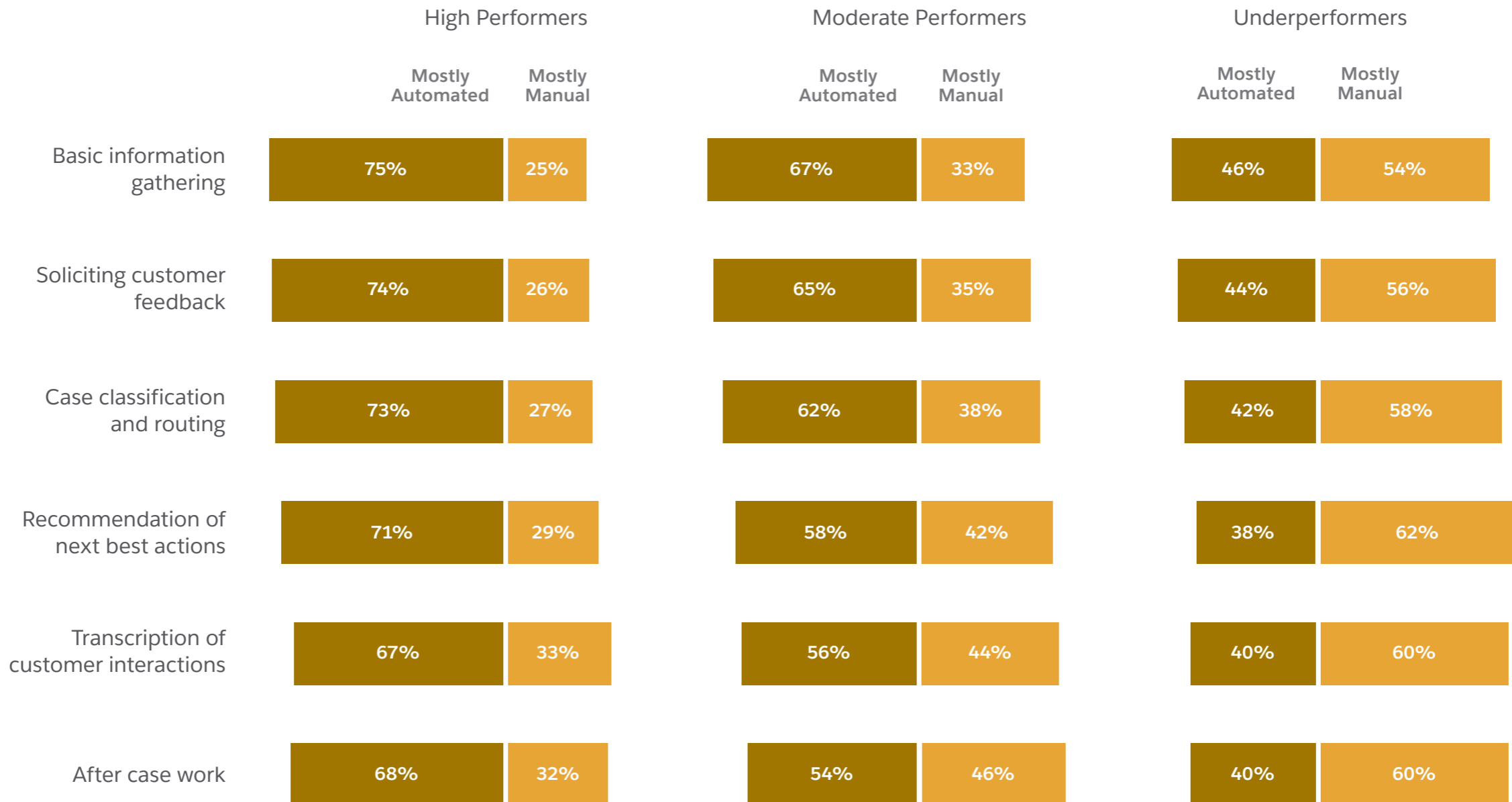


Decision Makers Who Say Their Teams Use Chatbots

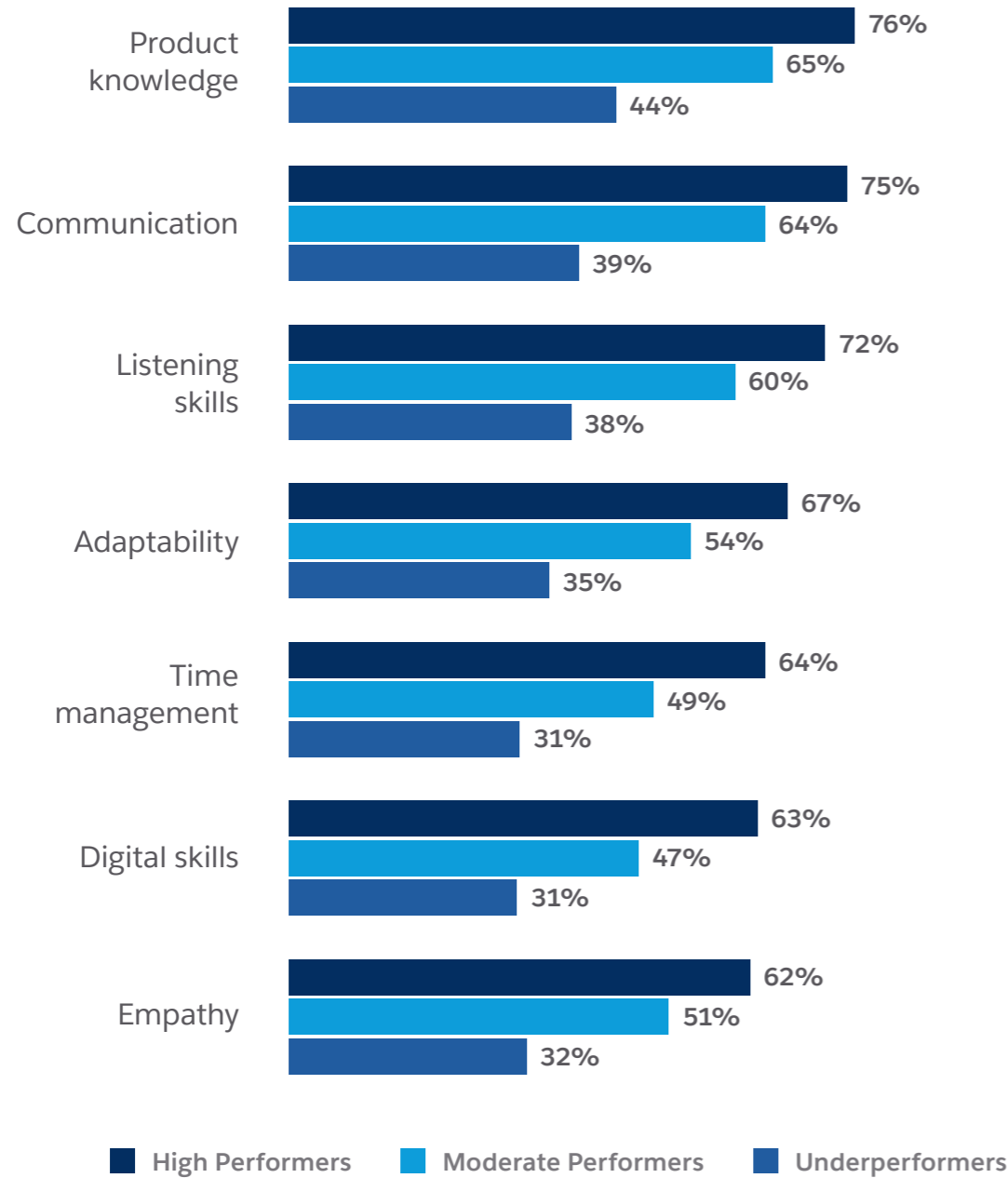


* Rate of increase is calculated with the formula (new value – old value)/old value.

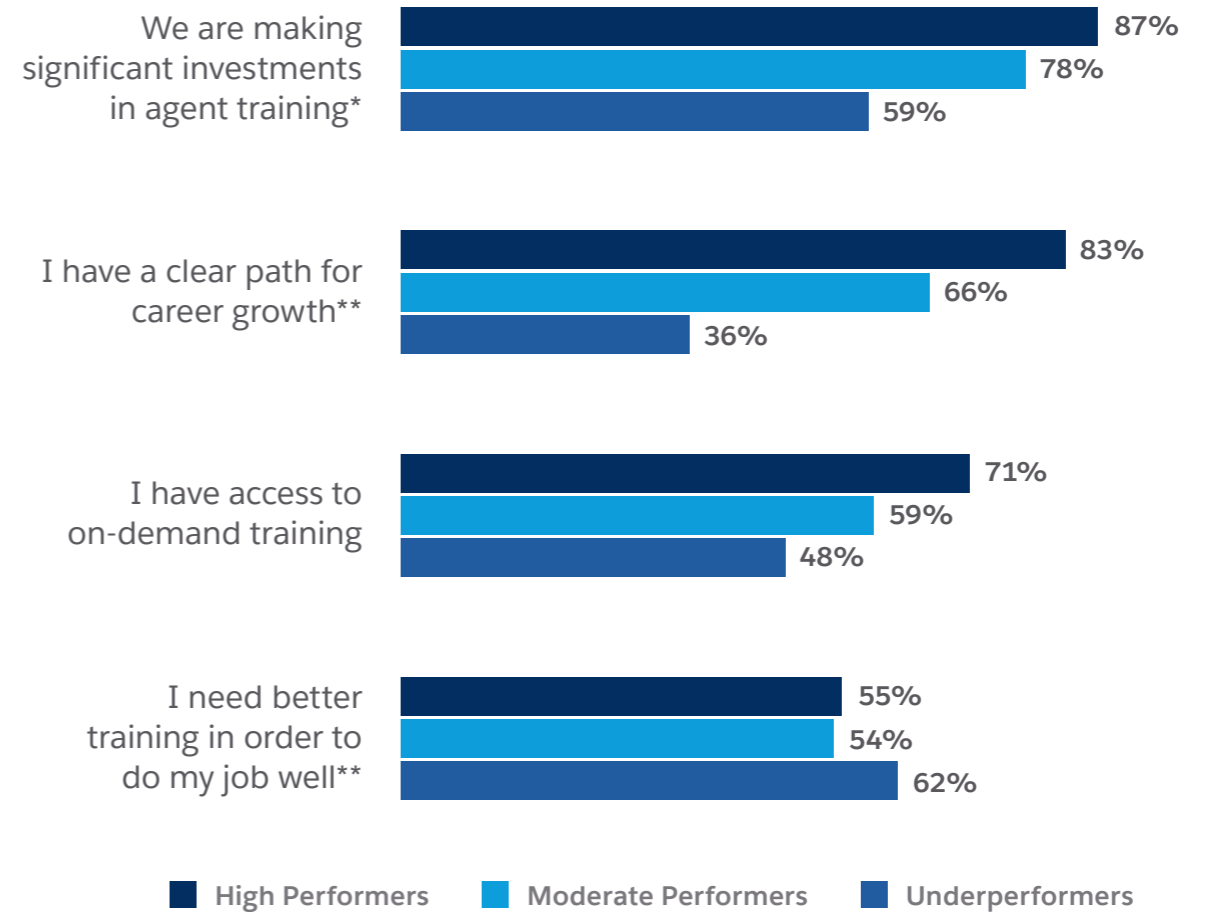
Service Professionals Who Describe the Following Activities as Mostly Automated or Manual



Service Professionals Who Rate the Following Skills on Their Team as Advanced

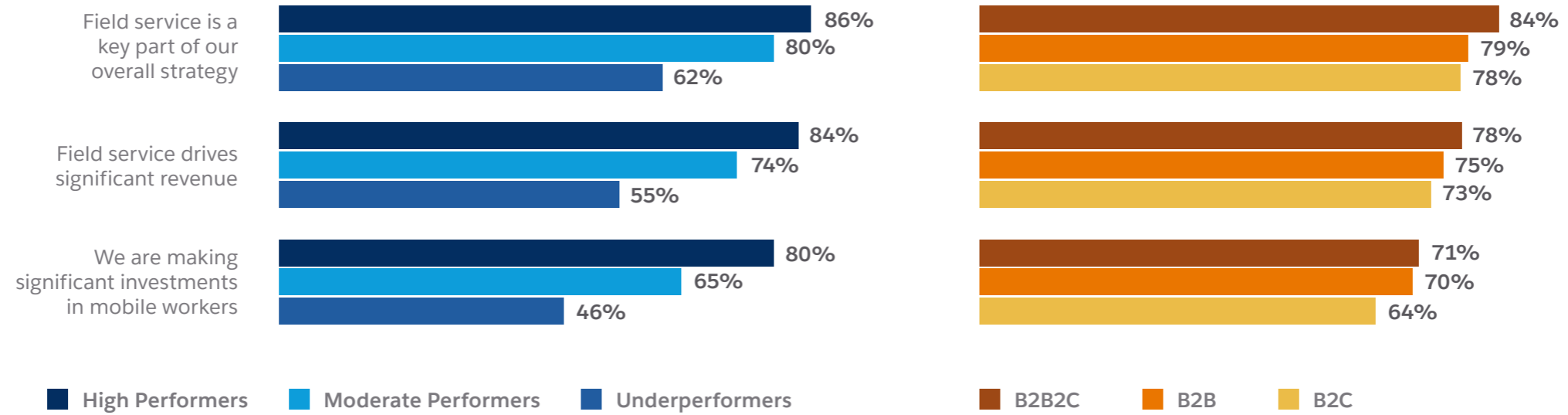


Service Professionals Who Agree With the Following Statements

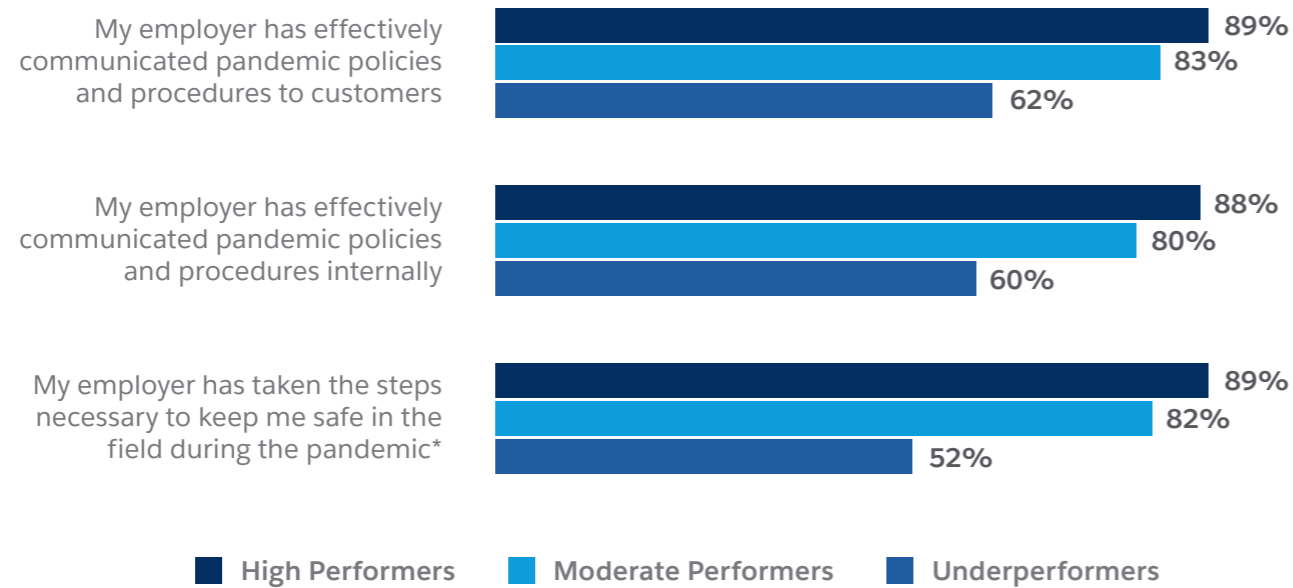


* Base: Decision makers.
 ** Base: Agents.

Decision Makers Who Say the Following



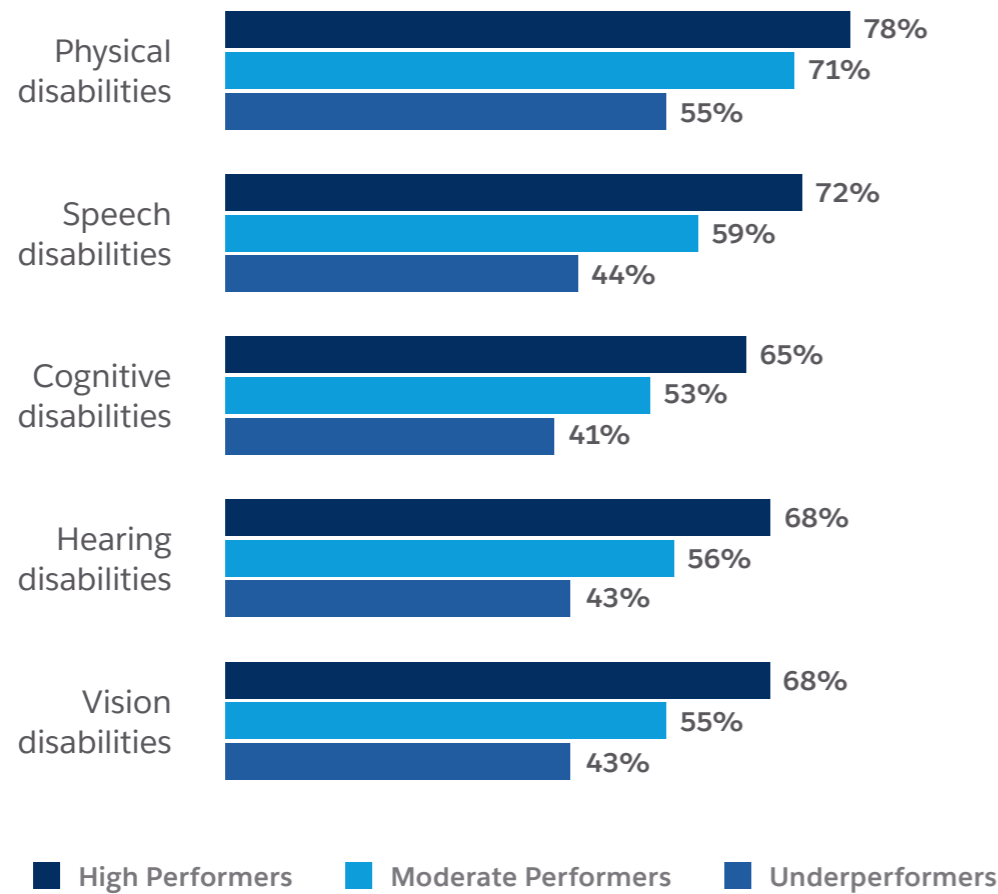
Mobile Workers Who Agree With the Following Statements



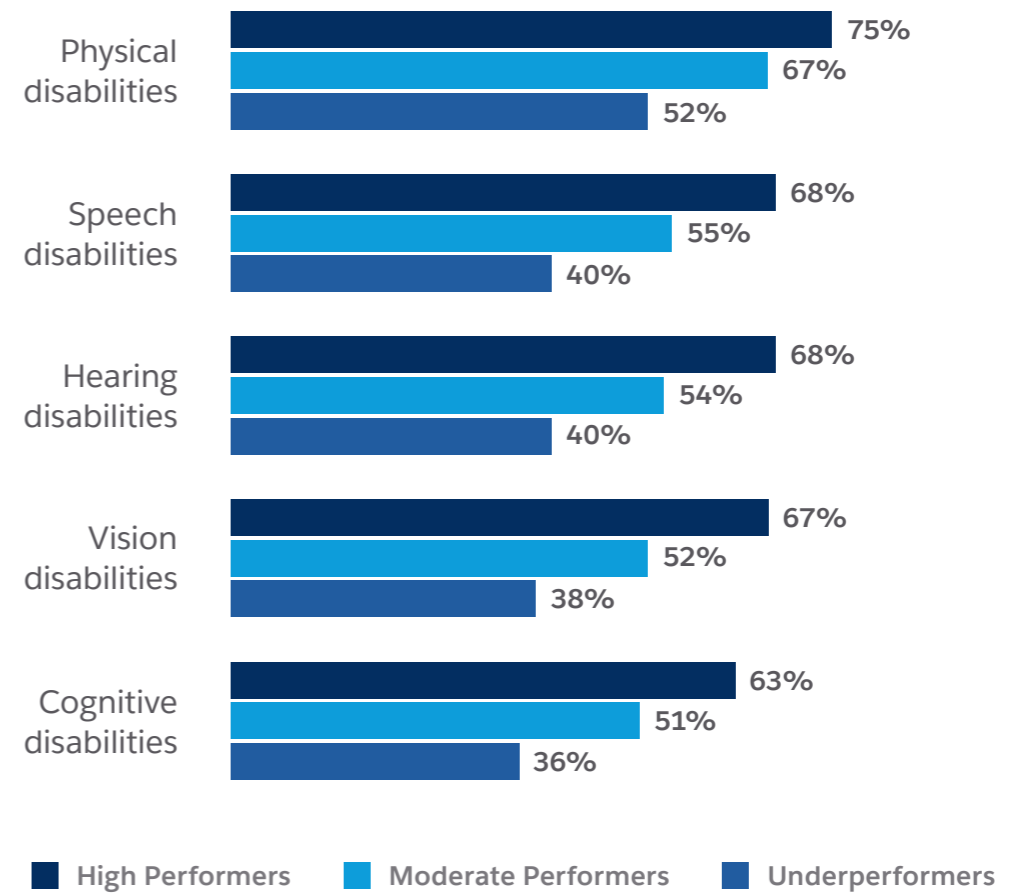
* Mobile workers only.

All data is based on responses from decision makers at organizations with field service operations, mobile workers, or dispatchers.

Service Professional Who Say They Provide the Proper Accommodations For **Customers** With the Following



Service Professional Who Say They Provide the Proper Accommodations For **Employees** With the Following



SURVEY DEMOGRAPHICS



Survey Demographics

Country

Argentina.....	4%
Australia	3%
Belgium	2%
Brazil	4%
Canada	4%
Denmark.....	<1%
Finland.....	<1%
France	4%
Germany.....	4%
Hong Kong	3%
India.....	4%
Indonesia	3%
Israel	<1%
Italy	4%
Japan	4%
Malaysia.....	3%
Mexico.....	4%
Netherlands	4%
New Zealand.....	1%
Norway	<1%
Philippines.....	4%
Poland	4%
Singapore	3%
South Africa	4%
South Korea	4%
Spain.....	8%
Sweden.....	<1%

Switzerland.....	1%
Thailand.....	3%
United Arab Emirates.....	1%
United Kingdom	4%
United States	7%
Vietnam	3%

Industry

Automotive	3%
Communications.....	5%
Consumer goods	8%
Energy & utilities.....	3%
Financial services.....	7%
Government.....	6%
Healthcare.....	8%
Hospitality	4%
Life sciences or biotechnology.....	1%
Manufacturing.....	9%
Media & entertainment	3%
Nonprofit.....	2%
Professional or business services	11%
Retail.....	9%
Technology.....	8%
Transportation	5%
Other	7%

Business Model

B2C.....	47%
B2B.....	23%
B2B2C	29%

Seniority

VP+	7%
Team leader, manager, or director	43%
Individual contributor.....	50%

Individual Contributor Roles

Office/store-based agent	67%
Mobile worker.....	23%
Dispatcher	9%

Want to learn more?



Segment by country and industry

Interact with “State of Service” data in Tableau.

[EXPLORE THE DATA >](#)



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