

CREATE A  
**MOBILE-READY**  
CUSTOMER  
SERVICE STRATEGY



# THE RISE OF MOBILE

Twenty years ago, mobile devices were just getting started. In fact, back in 1995 only one percent of the population had access to a mobile device. Today, there are over **5.2 billion** mobile phone users comprising **73 percent** of the global population.<sup>1</sup> Mobile devices now have an impact on just about every part of our daily lives — from communication and social interaction to mobile commerce. To say that mobile is a trend is an understatement. The rise of mobile is fundamentally changing the way we interact — and is spawning a whole new generation of technology, applications and businesses.

For any business, mobile has become a critical way to interact with customers and prospects. In 2014, mobile users overtook the number of desktop users. Smartphone subscriptions, currently 2.1 billion, will soon overtake the number of global Internet users (2.8 billion).<sup>1</sup> There is no doubt that mobile use is now ubiquitous.

We are now using our smartphones to do more things than ever before. Just five years ago, the average person would spend 48 minutes per day on a mobile device. Today the average person spends close to 3 hours each day engaged with their devices.<sup>1</sup> In 2015, Google announced that for the first time, people performed more searches on mobile devices than on desktops and laptops. In fact, it is now more and more common for people to interact exclusively through mobile devices. With customer behavior evolving to be mobile-first, businesses must also evolve the various ways in which they interact with their customers in order to keep up with these changes.

This is particularly true for customer service organizations. Shifts in consumer behavior indicate that mobile devices will be taking an increasingly prominent role for customers to get help and find the information they need. Customer

expectations have risen dramatically over the past ten years and now consumers simply expect access to information and support anywhere, anytime. When it comes to web self-service, it's crucial to deliver answers in an easy format for mobile users, whether they use Google to search, or visit your website's help section directly. In fact, we've seen a steady growth of customers accessing global Oracle data centers through a mobile device. These mobile interactions already represent 25 percent of all of Oracle's data center traffic.

In a similar vein, customer service employees have the same expectations because they've become accustomed to these mobile behaviors in their personal lives — they're consumers too. They want to leverage mobile devices and the simplified, intuitive user experiences inherent with these devices in their work environments. This has already given rise to the Bring Your Own Device (BYOD) trend. Considering these new customer and employee expectations, you're probably already thinking about how you can prepare your service organization to meet the challenges and take advantage of new opportunities created by this new mobile world.



# Mobilizing Your Service Organization



In 2014, mobile users overtook the number of desktop users. Smartphone subscriptions, currently **2.1 billion**, will soon overtake the number of global Internet users (**2.8 billion**). There is no doubt that mobile use is now ubiquitous.<sup>1</sup>

In the last few years we've been hearing a lot about the ideas of mobile-first and mobile-only. Mobile-first is part of responsive web design, a practice of creating website experiences that are optimized depending on the device you're using. The mobile-first concept has been gaining a lot of traction, and the number of websites designed in a responsive way has increased steadily.

At the same time, we're seeing a trend in business software that is focused around the mobile experience, in which employees across the enterprise use software for a wide variety of functions including sales force automation, collaboration and communication — all while on the move, using their phones and tablets. There is great value in terms of agility, productivity and employee experience to increase your organization's mobility. Yet, we would encourage you to not translate this into, "We need a mobile app or responsive user interface for all of our software or customer-facing systems."

There are use cases in which this makes sense, and there are use cases in which it clearly doesn't make sense. A customer service representative (CSR) working for a large business-to-consumer (B2C) contact center — handling complex cases from many different channels — has a need for a highly productive work environment. It just doesn't make sense to try to ask that service representatives handle these cases on a mobile phone or tablet. However, a sales representative on the road or a field service representative is on the move every day. For example, a mobile sales representative needs to review information about the account, find contact information and update records with important meeting notes, all while traveling between meetings. A field service representative must provide statuses on jobs, update asset data, search knowledge articles and collaborate with his peers in the field. In these scenarios, a mobile experience makes perfect sense.

Mobilizing your organization requires a tactical search for relevant use cases, but in the context of a strategic focus on mobile value drivers. To help, we'll provide an overview of some of the most high-impact use cases across four areas:

- Customer service
- Field service
- Complex rules or incident management *outside* the contact center
- Web self-service



# To Mobile, or Not To Mobile (That's the Question)

Before exploring these relevant use cases, it's imperative to clarify a common misconception about mobile: Mobile isn't just about mobile phones.

A lot of investments have gone into making specific applications for specific types of devices — for example, a desktop application, a mobile application or a tablet application. All of this is becoming irrelevant. In the past couple of years, we've seen phones getting bigger and tablets getting smaller — in essence, converging into the same type of device.

A range of device manufacturers recently announced powerful tablets for the enterprise space running Windows OS. We're also seeing smartphones that are running full Windows 10 OS, where you just have to plug in peripherals like a keyboard, mouse and monitor to have a computer. Thus it becomes less and less important to talk about device-specific software, as clearly the lines between these categories are blurring.

Mobile is about understanding specific tasks and use-cases, providing the tools that make the greatest impact, and making sure these different tools are consistent and connected. Consider the following use cases within different areas of customer service.

# Mobile Scenarios in CUSTOMER SERVICE

Agents working in multi-channel contact centers spend the majority of their day solving cases coming in from a range of different channels. They need an interface in which productivity is key. They need all the context and data available to solve the customer issue as efficiently as possible. They need a unified desktop, integrated with sensitive data from back-end systems through behind-the-firewall integration. Also, they are likely using two or three big monitors (flanked by yellow post-it notes and cute pictures of their kids and pets). Clearly, this is not a great use case for mobile.

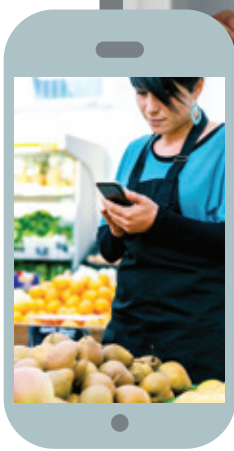


However, when you think about supervisors and managers that walk around the contact center, are in and out of meetings frequently, and often travel between contact centers in different locations, mobile access to a customer service platform would be of great value. Still, mobile access doesn't necessarily mean a user would access the system through a mobile phone. Supervisors and managers may want to monitor operations via a consolidated dashboard with the ability to drill down and dig deeper into cases when necessary. Access through a tablet would probably make most sense.



Another relevant use case is when customer service is decentralized: for example when service is delivered via face-to-face support in stores, at airports, front-desks, branches, etc. These individuals deliver customer service, but not in a full-time capacity like the agents in a contact center. While they may not be delivering multi-channel experiences over live chat, telephone and social media, they will still need to review cases, update contact information and access customer product information. They'll need access to this information on a computer, laptop or tablet outside the contact center in order to deliver a connected customer experience.

In these scenarios, mobile access makes perfect sense.



Consider a retailer in an emerging economy, which has a big network of small neighborhood grocery stores, each manned by one employee/franchisee. This one employee's job consists mostly of manning the cash register, restocking the shelves and chatting with people from the neighborhood shopping for groceries. In some instances, however, they need to be able to look up the status of a case or file a complaint on behalf of a customer. In this case, the store employees/franchisees are not provided a corporate computer or tablet, but they all have a personal smartphone. That's because even though this person is clearly delivering customer service, it doesn't make sense to give them access to a full customer service platform they might only use a few times a month. It would make more sense to create a simple mobile application or a custom browser portal accessible on any device and focused on empowering franchises to support the specific customer requests they are most likely to encounter.

# Uberization of Field Service

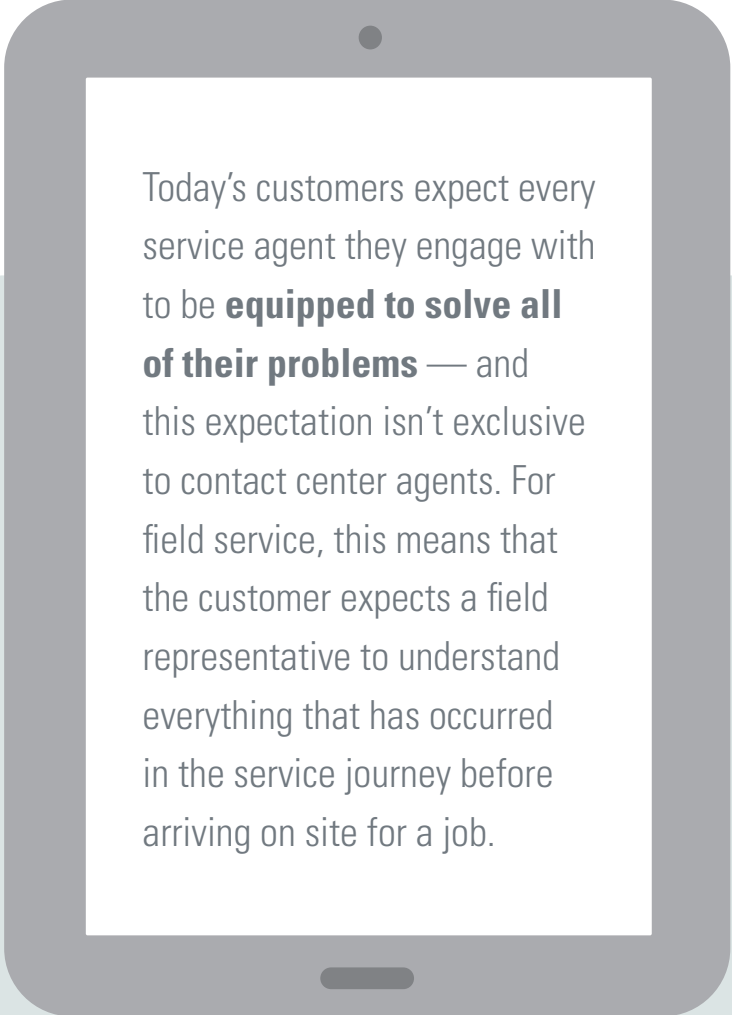
When determining where to apply a mobile experience, it might be easy to overlook some of the most obvious use cases. However, even in traditionally mobile customer service scenarios, harnessing new mobile technology and behavior can have a tremendous impact. Let's explore the ultimate mobile service use case: field service.

Field service has embraced mobile technology from the CB radio to the smart phone. However, advancements in mobile technology have not just changed how field service representatives engage with a device, but also the type of work they perform, as well as how a field service employee manages his day.

Today's customers expect every service agent they engage with to be equipped to solve all of their problems — and this expectation isn't exclusive to contact center agents. For field service, this means that the customer expects a field representative to understand everything that has occurred in the service journey before arriving on site for a job. In addition, the customer expects the field representative to have the same abilities and tools as every other person on the customer service organization. For example, if the customer needs a follow up appointment, they expect the field representative to be able to book that appointment on the spot. If the customer wants to purchase an additional service, they expect a field service employee to become a field sales rep. To complete all of these new tasks, the field service representative needs a mobile interface that he can quickly and easily access, and that can support various processes and workflows beyond the traditional field service activities.

Furthermore, advancements in mobile technologies are allowing a complete shift in how field organizations are structured and managed. Similar to how the internet and low cost phone service have ushered in the era of decentralized contact centers, mobile technology and the sharing economy are allowing for non-centralized field service organizations. This is a trend we refer to as the "Uberization of field service."

The Uberization of field service means that through mobile access, complete visibility and smarter automation, field team members can dispatch their own work, create their own schedules, and make adjustments as the day changes — all while maintaining optimization of field operations. This is accomplished by providing everyone in the field visibility to jobs that need to be completed, the skills and schedules of their peers and finally, fundamental team management and collaboration tools. The combination of these capabilities allows for an exciting new world of self-dispatch, and essentially eliminates the requirement for a centralized center of operations for field service management.



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# Complex Service Scenarios ON THE MOVE

Another area where we see mobility playing a larger role in customer service organizations is around when it comes to solving very complex customer inquiries. Typically, because these requests require a deep understanding of rules, business processes and policies, they are escalated to the contact center. However in the mobile service era, customers expect every employee to solve all their issues, and that means moving these resolutions for complex service requests out of the contact center onto mobile devices.

Employees, such as an insurance claims adjuster, an equipment inspection technician or a retail service clerk, provide service on a daily basis away from their desk or office. They need automation to resolve issues immediately for each face-to-face interaction with customers. In order to respond to each customer, automated mobile decisioning is the only way to solve the issues dealing with rules, processes and policies without calling for assistance. Mobile decisioning provides better agility by enabling consistent service regardless of device, channel or location.



# Don't Forget Your Customers

25 percent of our customers' end-customers already use a mobile device to navigate to a support portal. In some industries, this number is significantly higher. More and more people are using their mobile device as their primary tool to connect to the Internet. The implication for service organizations: you need to prepare your website to support a mobile customer service interaction. Using responsive design, you can ensure the support section on your website is presented in the optimal way for each type of screen.

Also, you'll want to make sure your knowledge articles are structured in such a way that the content is easily consumed on a smaller screen. Especially when integrating your knowledge strategy with your search engine optimization strategy, it is very important to write short and concise answers that will be displayed in complete form when they appear in search results. For example, LinkedIn does an excellent job of creating easy-to-read answers via mobile (try searching LinkedIn unfollow company on your mobile device).

In addition to self-service and knowledge, we also recommend looking at mobile use cases for assisted service experiences. For instance, if you have an app that frequently leads to configuration issues and support cases, adding an in-app mobile cobrowse option could be a good idea. In some industries where consumer interactions are heavily mobile-focused and high-touch, live chat over mobile phones is taking off. Video chat is on the rise in these scenarios as well.



# Go Mobile:

## Define and Prioritize Key Areas for Driving Value

Now that we've defined some potential applications for leveraging new mobile tools and customer mindsets in your customer service organization, the question remains:

### Where should you start?

To prioritize your action steps, start by identifying where you can drive the most value by updating service processes. Commonly, initiatives around mobile empowerment in customer service settings arise from:

- Rising pressures to drive cost-efficiency pressures
- Desire to build sustainable differentiation for your brand through exceptional customer experiences
- Goals to improve customer stickiness

Depending on your key value drivers and where your business is on the maturity curve, some initiatives will logically make more sense to deploy first, while others may be better suited for a later phase in your mobile customer service transformation plan.

Generally speaking, the best starting point is to focus on making your web self-service experiences better suited for mobile access. Knowledge management continues to be the foundation upon which a cohesive, differentiated customer service is built. So making knowledge easily consumable is often a small, incremental effort — and this can go hand-in-hand with a web self-service mobile initiative. From there, consider what will have the highest impact on your unique business — perhaps you have a large field workforce, or you have complex products that require experts across the organization to have access to mobile customer service tools to ensure speedy service.

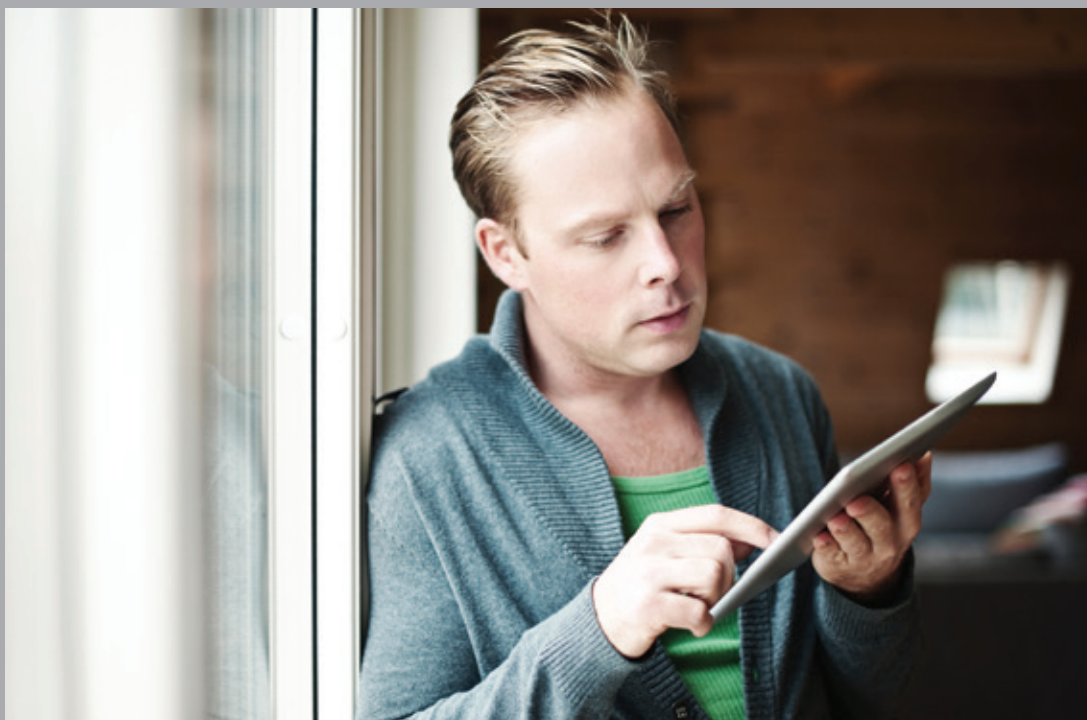
Not all the use cases we've presented here will be applicable to every business, but you can create a plan for adapting your service processes to the new mobile mindset of consumers by simply thinking strategically about the most common points of interaction and your most pervasive customer service challenges.

Mobile is undoubtedly changing both our personal and professional lives. Customer service organizations should decide on a strategy to bridge the gap between mobile behavior and customer service. This requires a strategic review of value drivers, combined with a tactical search for relevant use cases.

Don't fall in the "we need an app for everything" trap — some users need big screens, some users don't. Some need a rich experience, others just need basic functions. Your strategy must take all of these dynamics into consideration.

As you analyze your service organization to determine opportunities, don't forget to include user and business processes that are already mobile. Can these existing mobile tools be further enhanced? For example, investigate how to use mobile technologies to change your field technicians into versatile brand ambassadors. Furthermore, explore opportunities to increase agility and mobility by bringing complex policy rules and decisioning processes to a mobile environment. Consumers will increasingly use their mobile devices to contact you with their service inquiries, so your website and contact centers must be ready for this new dynamic.

Finally, in order to decide where to start you need to define your value framework. Your business' priorities and key value drivers — and where you are in terms of maturity with your customer service strategy — will help you determine the right starting point and next steps.





<sup>1</sup> Mary Meeker, Kleiner Perkins Caufield Byers, "[Internet Trends 2015 – Code Conference](#)," May 27, 2015.

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June 2016

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