

Hubspot OHYPE & DEXTER

HubSpot Annual State of Service in 2022

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Introduction

Introduction

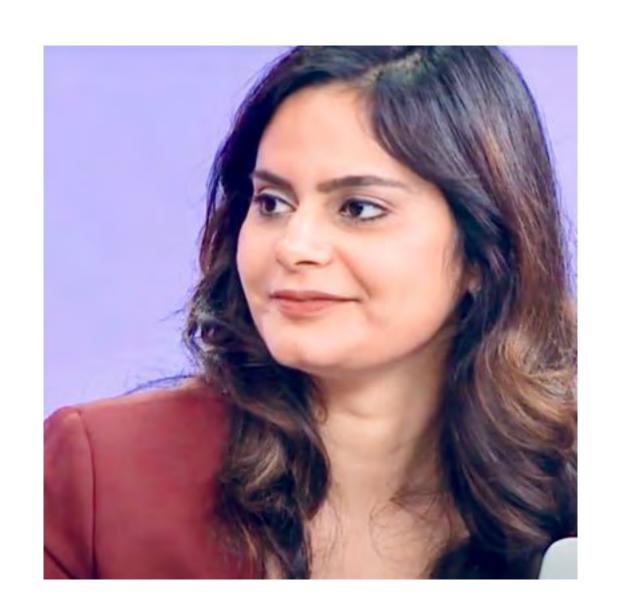
After a tumultuous 2020, 2021 continued to stretch and challenge businesses, customers, and individuals alike in our expectation setting and experiences. On a personal level, I experienced many highs and lows and at points found myself more grateful than ever for the little things: joyful moments with my family and dogs; focused time for reading, writing, and continuous learning; and growing a team that makes me immensely proud. I also spent much of the past year reflecting on the evolution of customer service, thinking back on my own experiences, including working in the service industry as my first corporate job.

Heading into 2022, customer expectations and experiences continue to be key determinants of brand and company loyalty, with consistent preferences for self-service, personalization, and real-time resolutions. What was once considered differentiation in customer service now resembles table stakes requirements to be competitive with both customer service and customer experience at large. Despite the increased market pressures facing companies, some still lag with delivering what customers need and prefer. This misalignment between customers and customer service teams leaves customers feeling ignored, unseen, and uncared for when they need help the most.

Interestingly, many solutions that have evolved in the past several years to drive efficiency are no longer sufficient to solve for this frustration. In turn, based on market and customer research, including this year's State of Service survey, we believe that customer service teams and organizations have a meaningful opportunity in 2022 to level up their service delivery. Teams must move beyond efficiency and double down on customer care across the end-to-end customer journey. With interactive tools for connected teams and easy-to-use channels for customers, organizations can deliver exceptionally authentic customer service when, where, and how customers want it most.

As I look ahead to 2022 and beyond, I am excited to see how the customer service industry continues to evolve to deliver on its key charge: solving for the customer. Since joining HubSpot as the GM of Service Hub this past year, I have continued to be energized by how our teams are going above and beyond in finding ways to deliver remarkable solutions for customers in a way that brings agency and authenticity to the customer experience. My colleagues and team at HubSpot, too, model that deep commitment to taking care of our customers as well as each other as we all continue to navigate the relentless presence of change in our new normal world. Now more than ever, we need to leverage empathy in how we connect with and support our customers, partners and colleagues. Because at the end of the day, customer service is about helping others. Let's get back to the core of why we do what we do and show up for one another in earnest this year.

Thank you for reading, Poorvi Shrivastav GM, HubSpot Service Hub



A note on survey respondent demographic data

The 2021 State of Service survey had over 1,400 respondents, representing companies ranging in size from 1 to 10 employees up to over 10,000 employees. The company size with the greatest representation was 1,001-5,000 employees (21% of respondents), and there was notable representation from 251-500, 501-1,000, and 10,000+ employee segments (all representing 12%+ of total respondents). We surveyed service leaders in the United States, United Kingdom, Canada, and Australia, with the majority of respondents coming from the U.S. (63%). We also asked our respondents to self-report their company's growth over the last five years: exponential, high, low, or no growth.

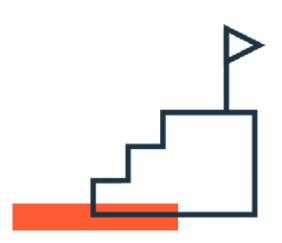
Two-thirds of survey respondents reported that their customer service organization reports into customer service/support teams. Respondents were nearly evenly distributed across seniority, with 28% of respondents reporting to VP or C-level executives, 30% reporting to a director, and 36% reporting to a manager (6% reporting to "other").

Executive Summary

It has never been more difficult to be a customer service leader.



2021 was a hard year, with almost 90% of leaders reporting that customer expectations have increased to an all-time high



Most customer service leaders don't have the resources to adequately deliver on these expanded expectations. Three of the top challenges for customer service leaders in 2022 are:

- A lack of prioritization: translating to inconsistency of customer care
- Too many tools: often adding more complexity than value
- Not enough time in the day: especially to address new opportunities and create organizational alignment



Customer satisfaction (CSAT) remains
the most important KPI for almost 75%
of customer service leaders. However,
almost 50% are now also responsible
for customer experience and ensuring
customer success, which is an increase of
more than 10% from last year



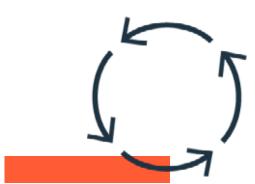
Their service agents are also being asked to do more with insufficient resourcing.

- Nearly half of all service agents
 already struggle to manage difficult
 conversations, and yet they're increasingly expected to support new crosssell and upsell goals in order to combat a growing misconception of service teams
- Almost 40% of customer service leaders say that their company views customer service as an expense instead of a driver for growth, an increase of almost 25% in one year alone



In order for customer service leaders to deliver on these increasing demands, they'll need to find ways to:

- Introduce and automate prioritization within their operation models
- Streamline tools for agents while also helping customers to self-serve
- Create time and opportunity to drive strategic alignment across their organizations' teams and channels
 enabling delightful, consistent, and comprehensive customer experiences that scale



The majority (95%) of customer service leaders agree that a CRM platform is an effective way to increase productivity

And while technology adoption by customer service teams is trending significantly up vs. last year, with a 30% increase in CRM adoption, it is still shockingly low overall

Only 50% have enabled their service teams with the most basic service features a CRM can provide: a help desk, knowledge base, and shared email capabilities

In order to meet this rising tide of customer and organizational expectations, customer service leaders need to shift their focus and investment to improving the overall customer experience and driving additional monetary value to their business. While customer service teams already have a big impact on the customer experience, they can heighten this impact by partnering with their peers in marketing and sales. Working together, they can enable service teams to achieve sustainable customer satisfaction and empower their agents to drive revenue – ultimately delivering magical, authentic interactions throughout the customer journey.

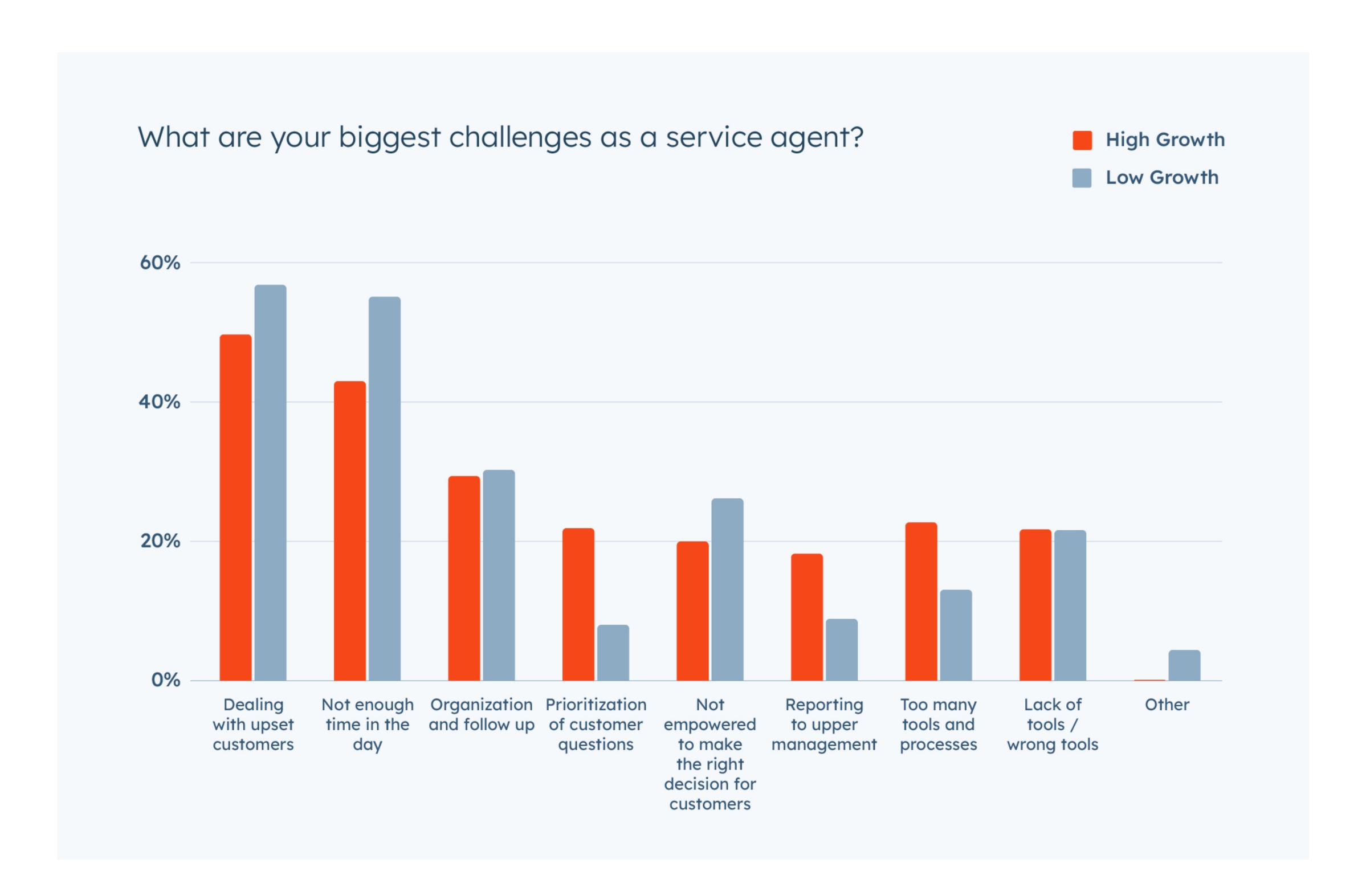
Service Leaders Want More Time Spent Helping Instead of Searching

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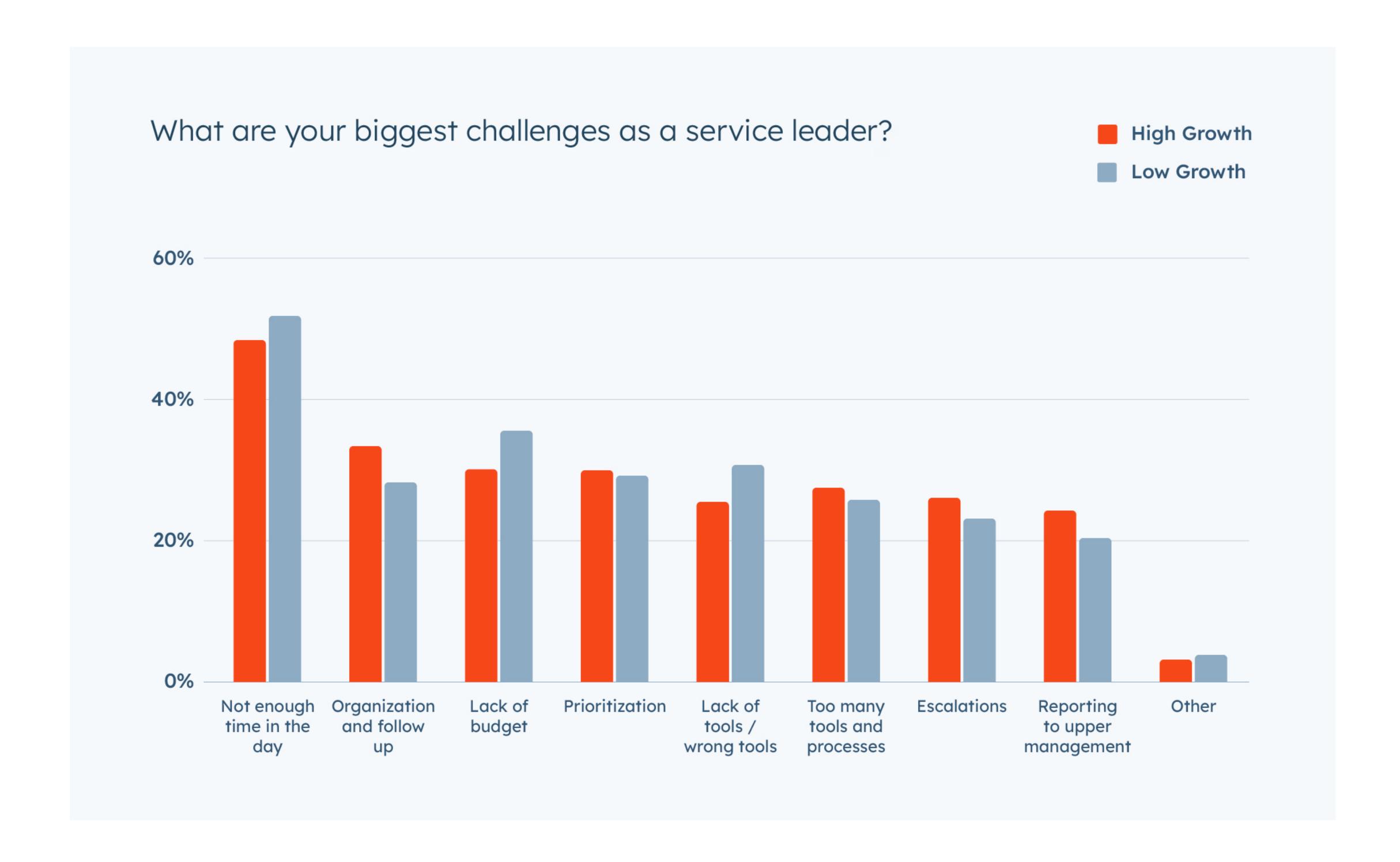
With digital acceleration impacting every facet of life, from entertainment streaming to mobile banking, it is no surprise that customer expectations similarly reflect a "need for speed" with issue resolutions. In fact, 90% of customers rate an "immediate" response as important or very important when they have a customer service question and 60% of customers define "immediate" as 10 minutes or less (HubSpot Research Consumer Customer Support Survey, 2018). Needless to say, the expectation for immediate resolution puts immense pressure on customer service teams to be efficient in how they handle customer inquiries.

In our survey, we asked respondents what they considered the biggest challenges facing service agents. Across all respondents, the most reported challenge was "dealing with upset customers" (52%). When we considered the different growth segments, we found that "prioritization of customer questions" was the second most reported challenge for exponential growth respondents (51%). It stands to reason that fast growing companies experience a higher influx of issues or more complex issues compared to slower growing companies. Efficient, quality resolutions require prioritization in these high growth cases.

Comparatively, for high and low growth respondents, "not having enough time in the day" came in second (43% and 51% respectively) and "organization and follow-up" came in third (29% and 30% respectively). Unfortunately, these two challenges likely exacerbate any frustration experienced and expressed by customers, the primary challenge facing agents. If service representatives are time constrained, it's reasonable to expect that it could be challenging to stay on top of data entry and maintenance, tracking down relevant information and answers, and timely follow-ups with customers. That 10-minute expectation for resolution suddenly seems like a stretch target.



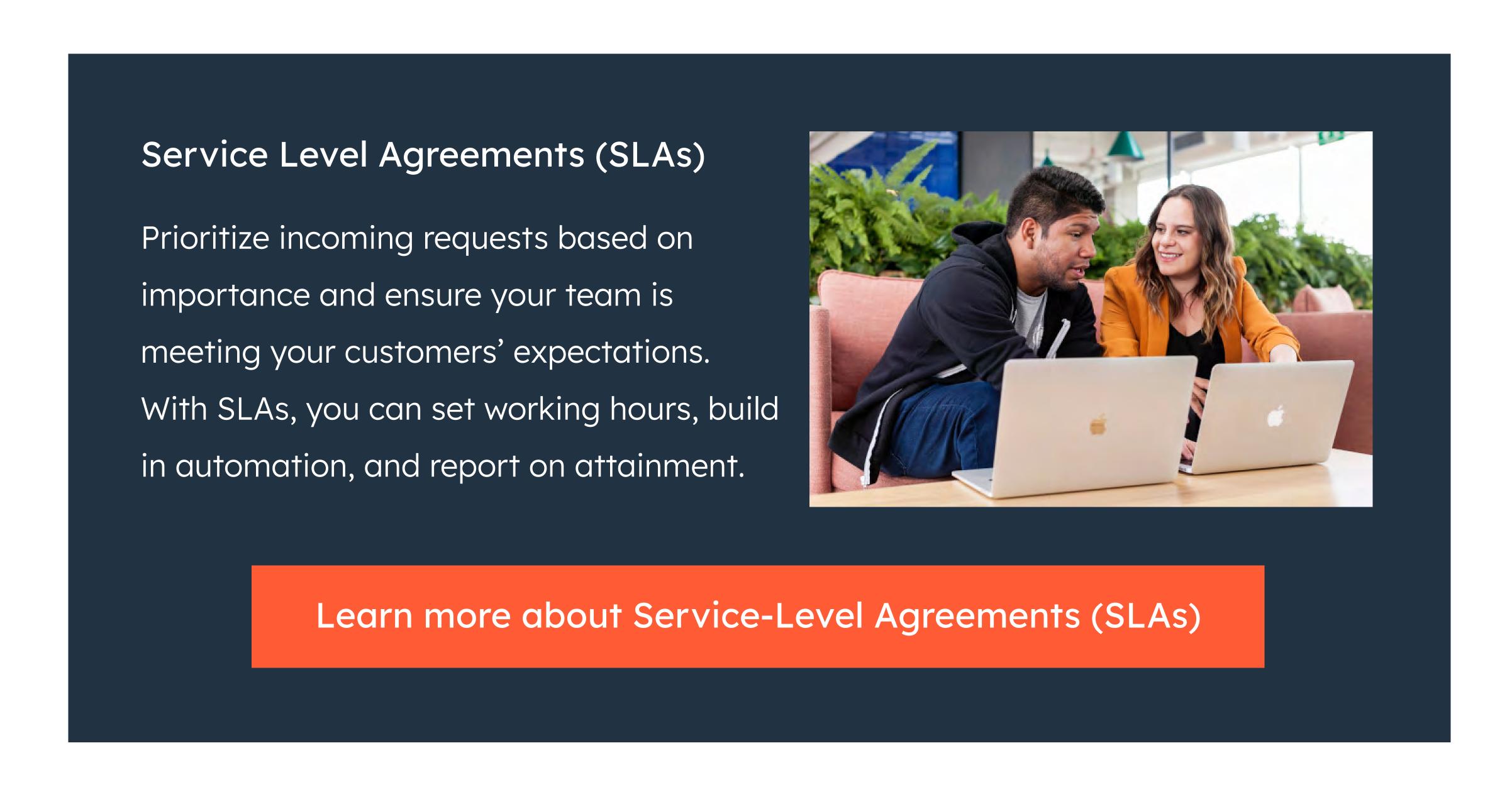
We next asked what our respondents' biggest challenges were as service leaders. Half of respondents noted "not enough time in the day" and this challenge had the highest percentage across all growth segments. Notably, it was highest for no growth (60%) and low growth (52%). The next highest most selected challenges across growth cohorts were organization and follow-up (31%) and lack of budget (30%).

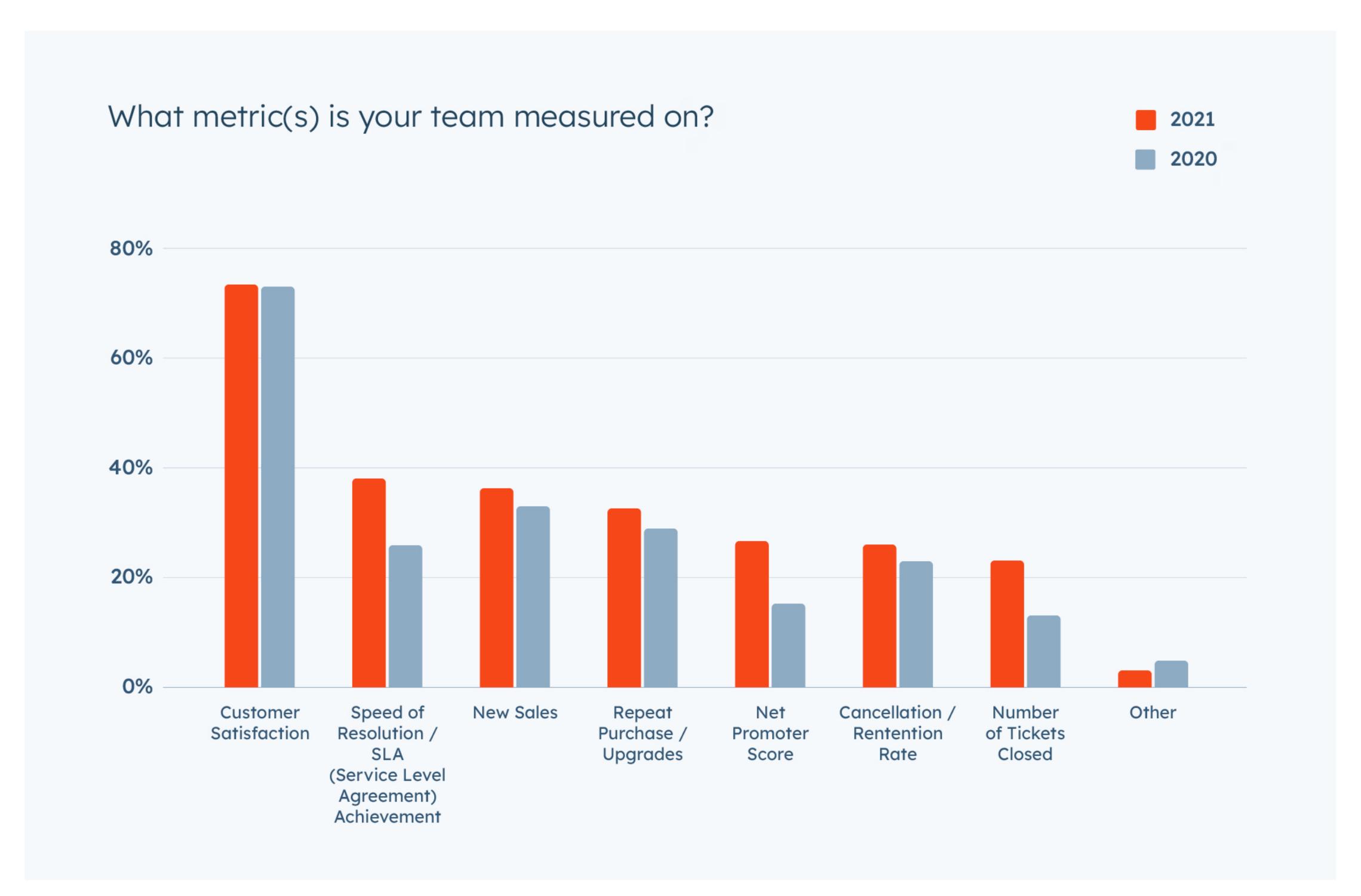


Time-to-resolution not only influences customer sentiment, but also impacts service agents' reported performance. Our survey asked respondents what metrics are used to assess their teams. Similar to the last survey fielded, customer satisfaction continues to be the leading metric that respondents' teams are measured against (74% in 2021). Across metric types, every metric saw an increase in reported use compared to 2020, with the largest increase seen with "Speed of resolution / SLA (service level agreement)", increasing 12 points to 38%. Speed of resolution moved into the second most reported metric in 2021, bumping "new sales and repeat purchase/upgrades" down a spot. In fact, speed of resolution has downstream effects on repeat purchase or upgrade decisions as speed of resolution is a key customer input when assessing successful customer service experiences.

Service Level Agreements (SLAs)

Service Level Agreements (SLAs) are a helpful tool that allows teams to prioritize incoming tickets. SLAs can be customized to prioritize tickets based on importance and time constraints to ensure that customer service agents are meeting customer expectations on solution delivery and follow-through. SLAs complement other workflow automation in customer service software, with streamlined notifications when SLAs are set to expire, reducing the risk of missed follow-ups or resolutions.



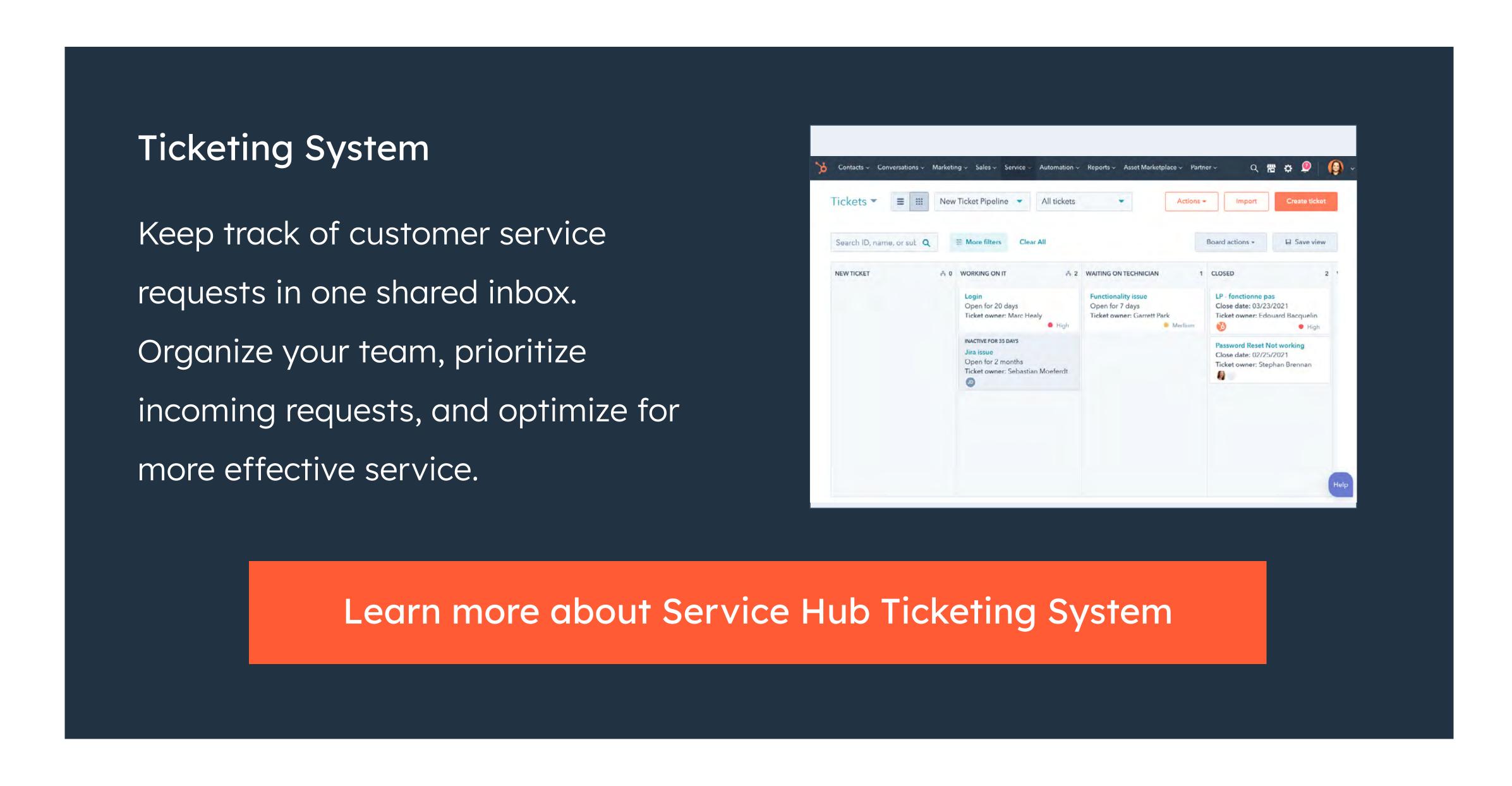


One metric that saw a notable increase in responses was "number of tickets closed", which had a 10 point increase compared to last year. Number of tickets closed is another measure to assess service efficiency, with higher numbers of tickets closed in a certain time window indicating faster resolutions. The exponential growth cohort had the highest percentage of

respondents using tickets as a metric (37%) compared to the high growth (23%) and low growth (19%) respondents. Not only is "tickets closed" a helpful metric for customer service leaders to consider when coaching their teams, but tickets are also an effective tool for agent time management.

Tickets

Instead of pouring time into manual trackers in spreadsheets, you can use tickets and automation to create, route, and enter customer data into your customer data management system or customer relationship management software. Ticket-based workflows route tickets to the right teams and agents based on criteria such as priority, category, and complexity. With a ticketing system, customer service teams can refocus their time - which is a critical limited resource - on the most valuable activities for their customers, solving their issues!



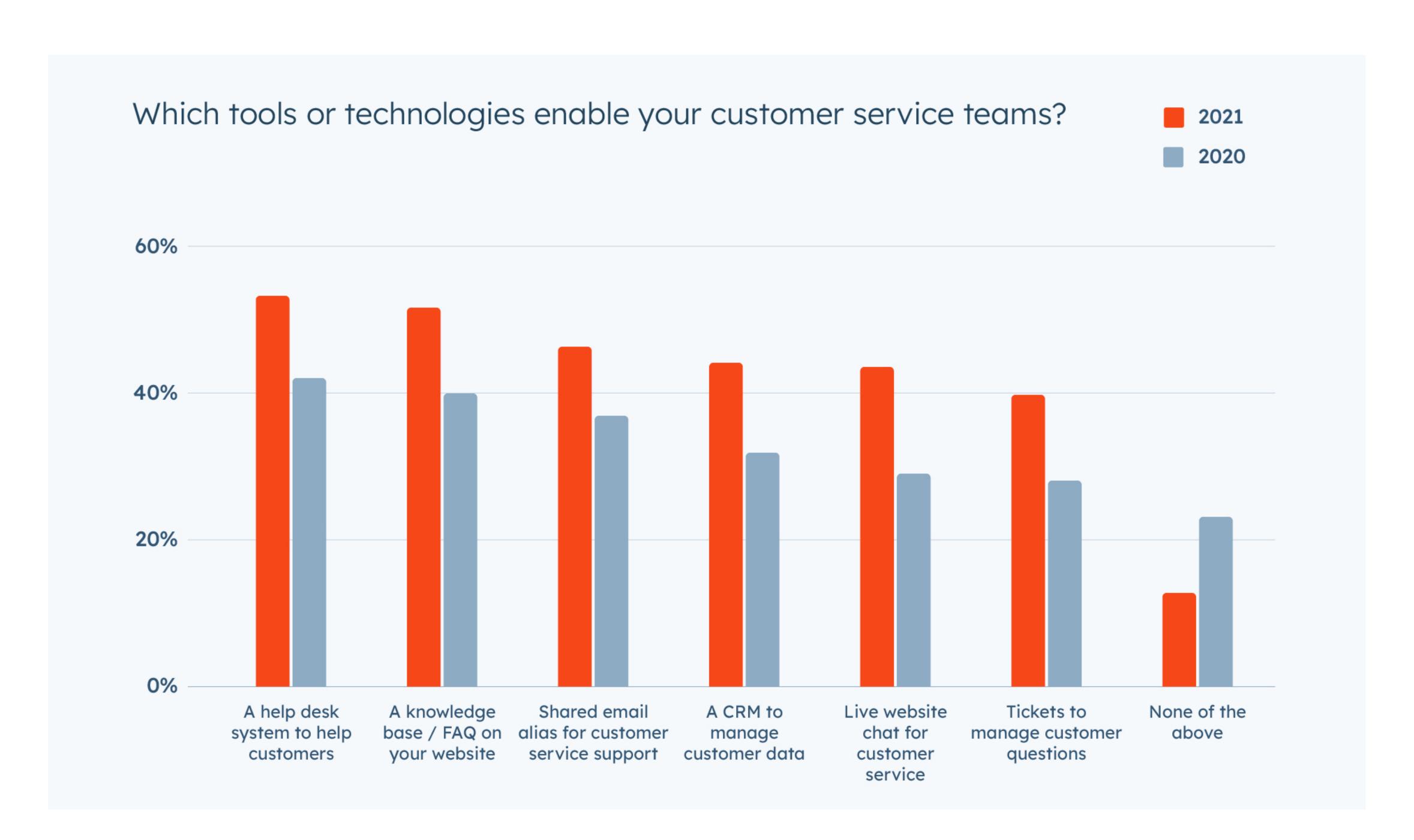
Implementing tools like SLAs and ticket systems enables speed for an improved customer experience, while also creating an easier agent experience, lightening the load of repetitive manual work, and facilitating automated organization for next steps. These tools are just the beginning when it comes to delivering delightful customer service.

Choice and Flexibility Expected to Drive Better Customer Outcomes

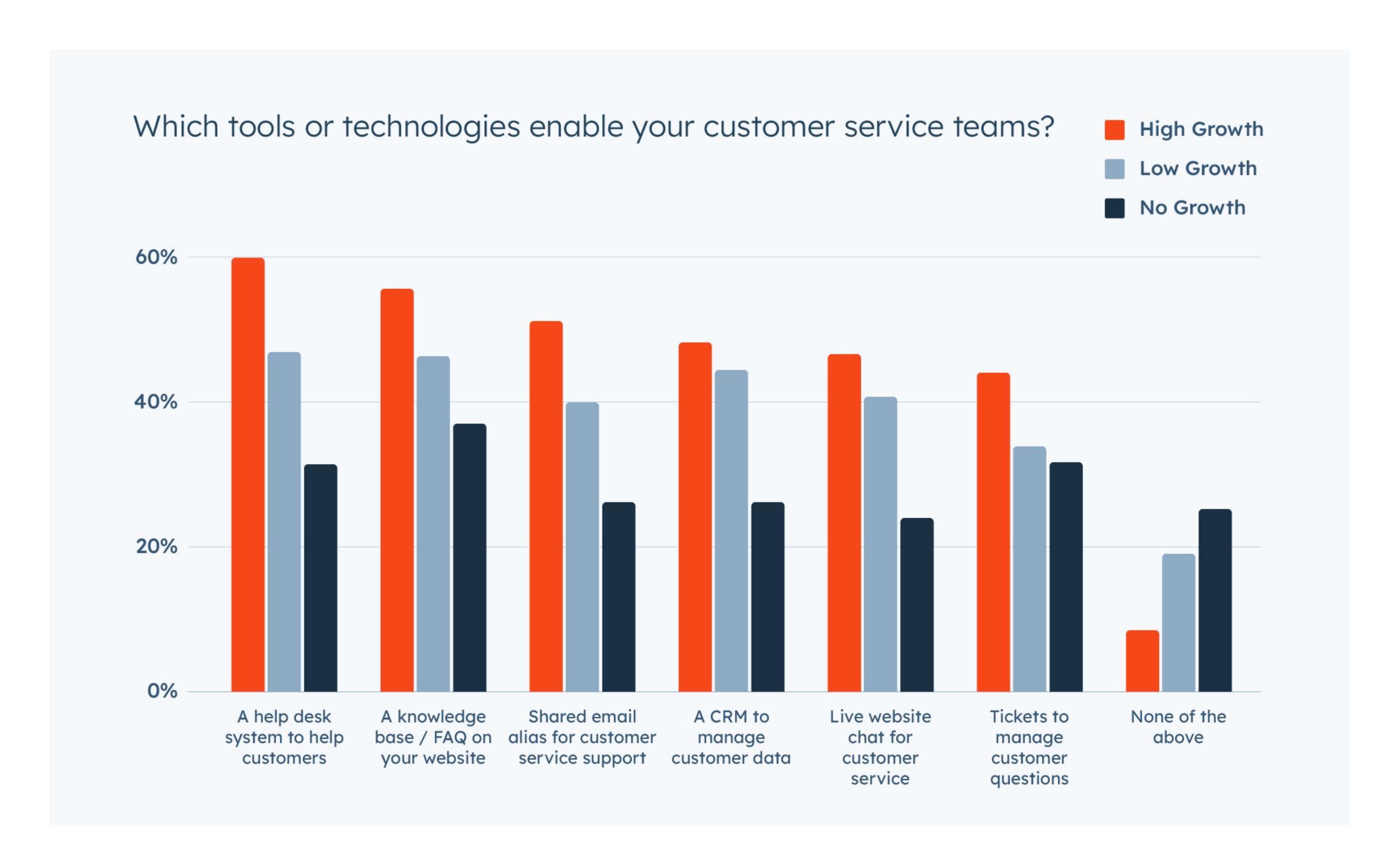
Choice and Flexibility Expected to Drive Better Customer Outcomes

Today more than ever, customers have access to a myriad of channels to connect with customer service. With this, several tools and technologies have been made available to customer service teams to enable smoother customer experiences, as well as empower a more collaborative and coordinated approach to customer inquiries.

We asked respondents to identify which tools or technologies they use to enable customer service teams. Comparing our results from 2020, all tools experienced increases in the number of respondents citing usage and the same tools and technologies were ranked the highest for their reportage usage. The top three tools included 1) a help desk system (up 11 points from 2020 to 53%) 2) a knowledge base on the company website (similarly up 11 points from 2020 to 52%), and 3) a shared email alias for customer service support (up 10 points to 47%). Of note, the tool with the most significant increase compared to 2020 was live website chat, which jumped nearly 15 points to 44% in 2021.



We then considered how companies at different growth stages might differ in their use of tools and technologies on their service teams. The high growth cohort had consistently higher percentages of respondents using tools across categories compared to the low and no growth cohorts, including a more than 10-point lead in the top three most cited tools (help desk, knowledge base, and shared email alias). Interestingly, the largest differences in reported use was found between low growth and no growth groups, specifically for the tools "CRM to manage customer data" and "live website for chat". Whereas only 24% of no growth respondents use a CRM to manage their customer data, over 44% of low growth and 48% of high growth companies use a CRM.

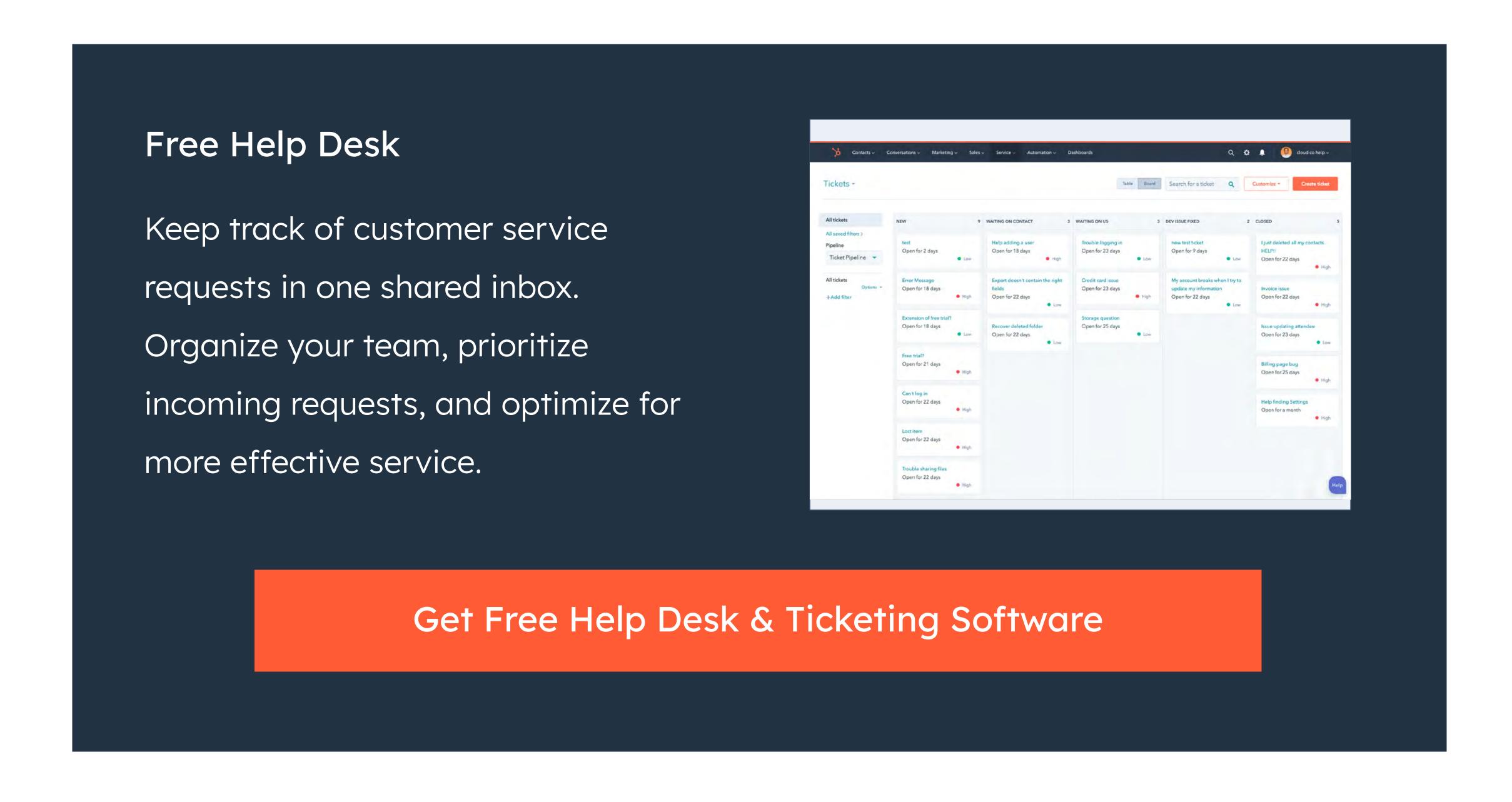


A CRM is a highly effective tool that creates a single, shared view of the customer, allowing for more collaborative and coordinated efforts by service representatives and more seamless, consistent experiences for the customer. Similarly, the reported use of a help desk was highest with the high growth respondents (60%) compared to the low and no growth cohorts. The help desk, like the CRM, facilitates easier collaboration among reps by minimizing the risk of redundancy, mistimed outreach, or missed follow-ups with it serving as a central headquarters for all customer inquiries. Leveraging CRM and help desk systems is clearly correlated with higher growth in 2021 and should be considered as potential investments for companies aiming to accelerate their own growth.

Tools That Support Customer Service Team Collaboration and Coordination

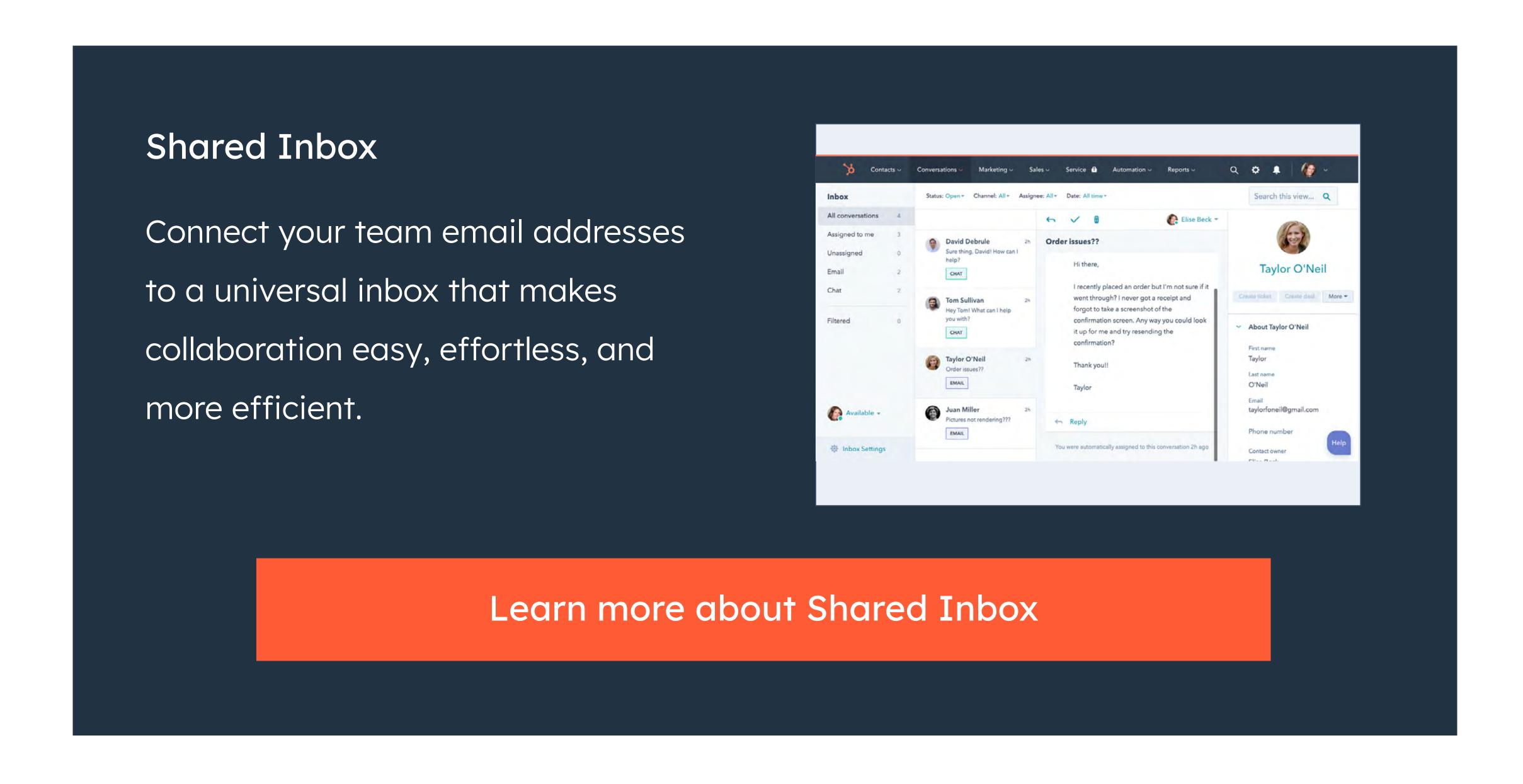
Help Desk

A help desk is a tool that allows you to track customer requests and inquiries in a unified workspace so your team can stay organized, manage tickets, and prioritize and assign work – helping your customer service teams identify and deliver solutions for customers faster. Tickets are recorded, organized, and tracked in a central dashboard that is accessible to the entire team so all agents can be aligned on status, context, and next steps for each issue.



Shared Inbox and Team Email

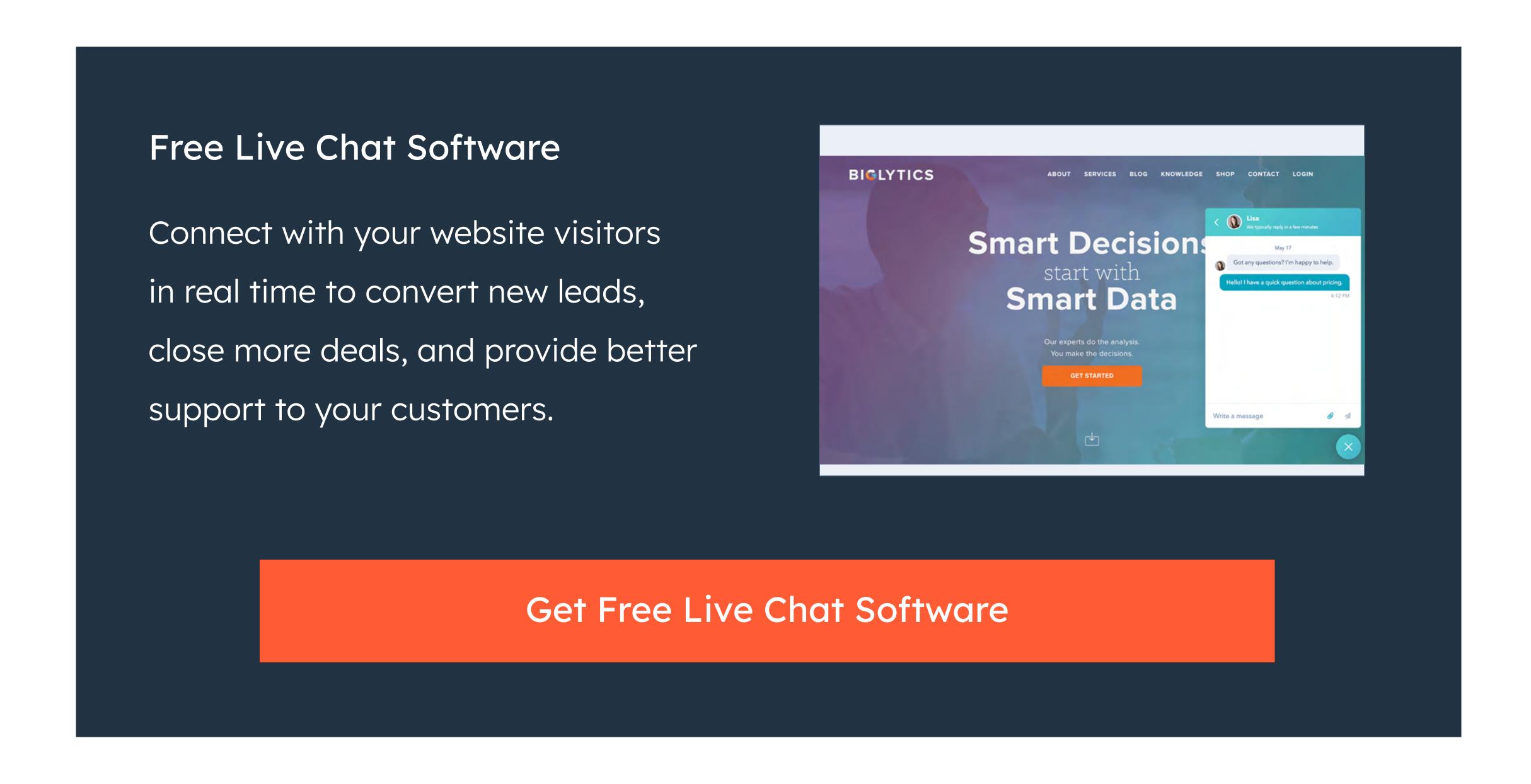
Using a shared inbox and team email alias allows teams to coordinate customer service communications. By having a central inbox, customer service teams no longer have to worry about losing track of a customer's inquiry and risk either a missed follow-up or a redundant outreach. Instead, a shared view of customer communications and responses creates transparency that ensures all customers are receiving the support and attention they need. Shared inboxes even have routing that can easily assign emails to certain team members and customizable templates so you can more quickly craft emails.



Tools That Give Customers Power of Choice and Agency

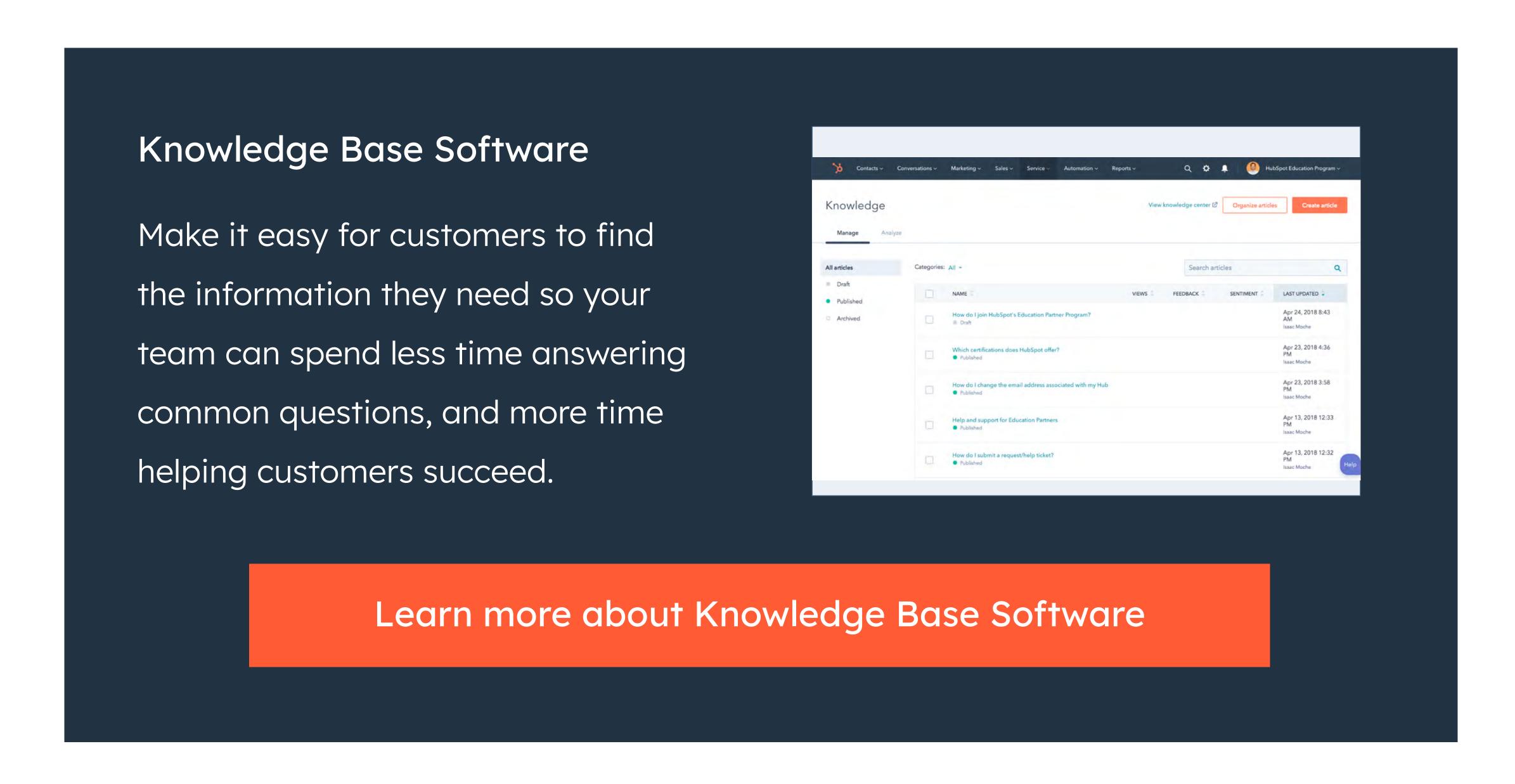
Live Chat

Live chat is a particularly effective tool that can help you meet your customers in a way that is flexible to their needs and on their terms. Live chat on your website gives visitors, prospects, and customers the opportunity to have real-time conversations with members of your customer service team and get the important information they need now, rather than later. You can also scale personalized conversations using chatbots that can answer frequently asked questions, book meetings, and more – allowing your team to focus on the conversations that matter most.



Knowledge Base

A knowledge base is an valuable self-service tool that helps customers find the answers to their most common questions. Your team can transform frequently asked questions and common tickets into resources and articles that enable self-service support. Knowledge bases can even include search functions to quickly get customers the information they need. A self-service channel like a knowledge base can help your team's efficiency, serving as a resource for their own reference and as a time-saving solution that allows them to focus on their customers' more complex questions.



We asked our survey respondents not only to consider which tools they used, but also to assess each tool's effectiveness. A remarkable 91% of respondents agreed with the statement "our help desk system increases productivity", the largest increase across the tools. Not only is the help desk tool used by more customer service organizations compared to last year, but it is continuing to deliver value to teams as well.

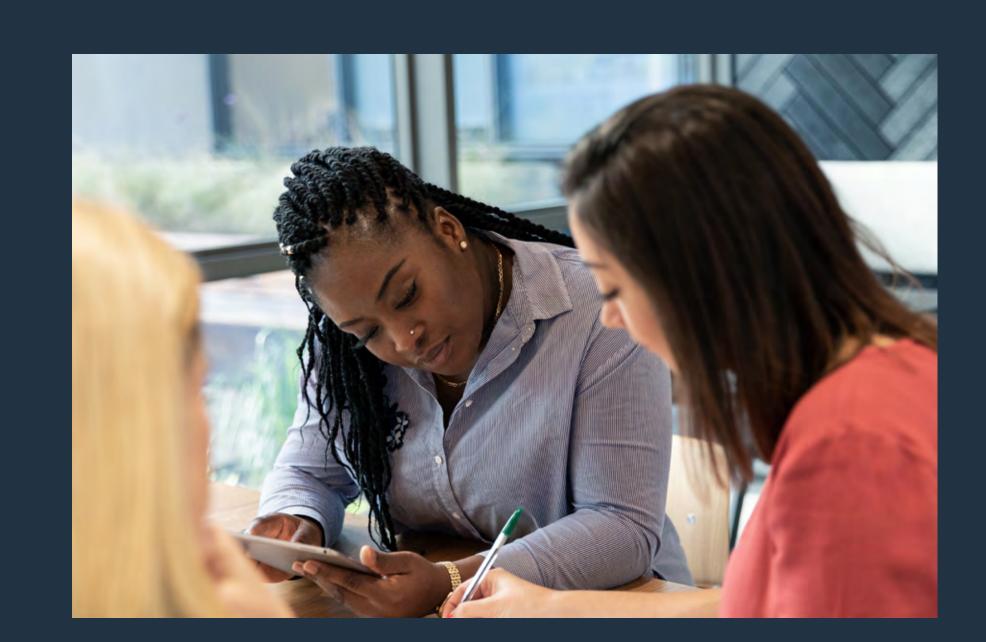
Though the help desk is clearly a leading tool, the tool with the highest number of respondents agreeing to its effectiveness was the CRM, at 95%. The CRM is the engine that powers your entire understanding of your customers and the experience you deliver to them by accurately capturing and centralizing customer data and their interactions with your team.

Customer Relationship Management (CRM)

CRM software helps companies and their teams manage their relationships with customers. A CRM is a central database to maintain and track customer data, notes, and team interactions. Not only does a CRM house all your important customer knowledge, but it also serves as a transparent resource available across teams – marketing, sales, customer service, accounting, and management can all benefit from working out of a CRM. Having a single shared view of your customer allows teams to collaborate and coordinate to create a remarkable end-to-end customer experience across every touch point with your team.



Think CRM software is just about contact management? Think again. HubSpot CRM has free tools for everyone on your team, and it's 100% free.

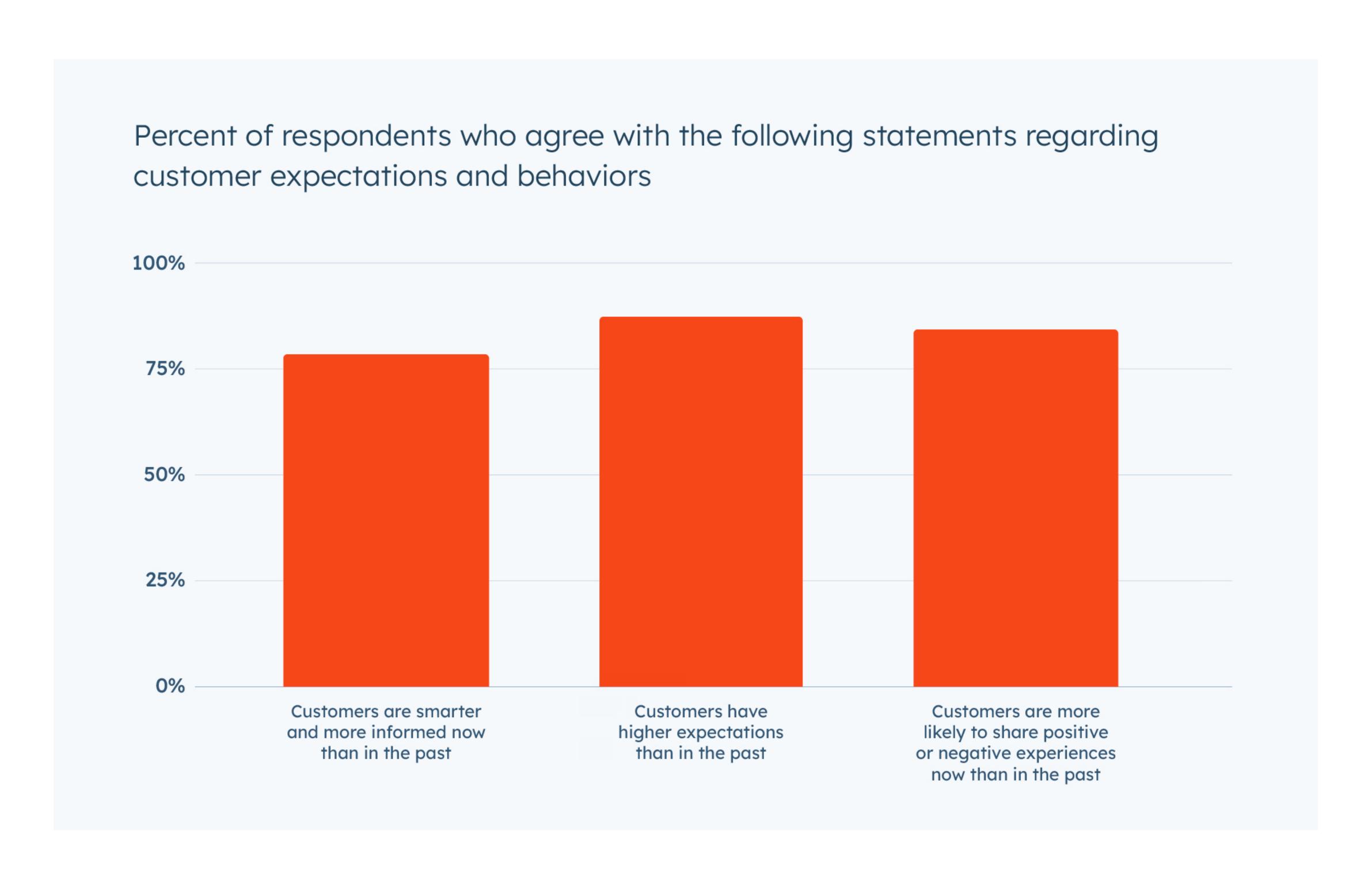


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Authenticity as a Driver of Customer Experience

Authenticity as a Driver of Customer Experience

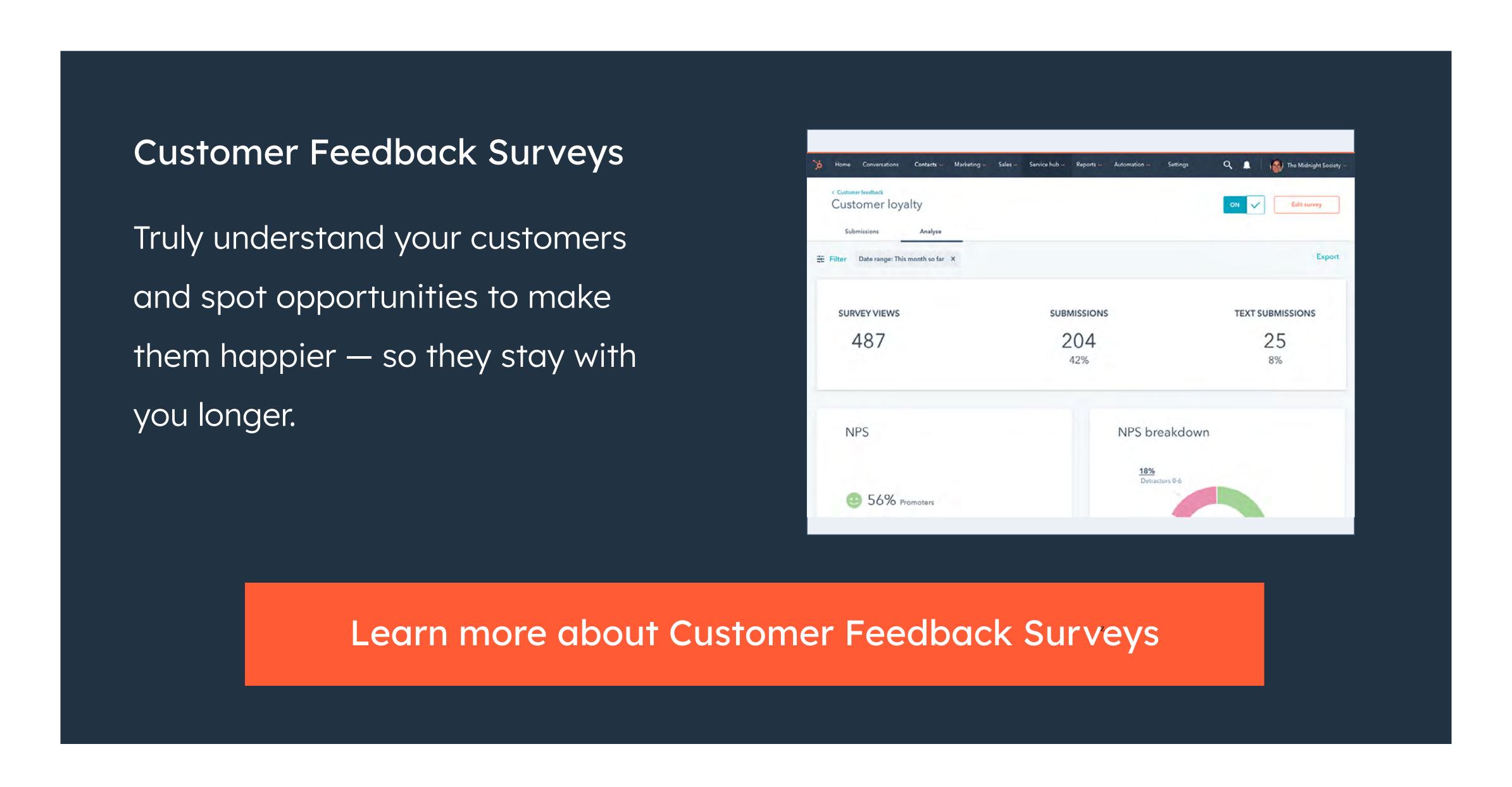
Though customers now have several options for how they can reach out to customer service teams, it is important to note that regardless of channel, customers expectations remain high. In our survey, we asked respondents if they agreed with statements around customer expectations and behaviors. Out of the pool of respondents, 79% agreed that customers are smarter and more informed now than in the past. A significant majority, 88%, of respondents agreed that customers have higher expectations than in the past. Similarly, a majority of respondents – 85% – responded that customers are more likely to share positive or negative experiences now than in the past. This all indicates that even with technologies and tools evolving to create easier, faster, and more flexible service options, customers continue to expect exceptional experiences when looking for customer service. So how can customer service organizations and leaders create remarkable customer experiences at scale?



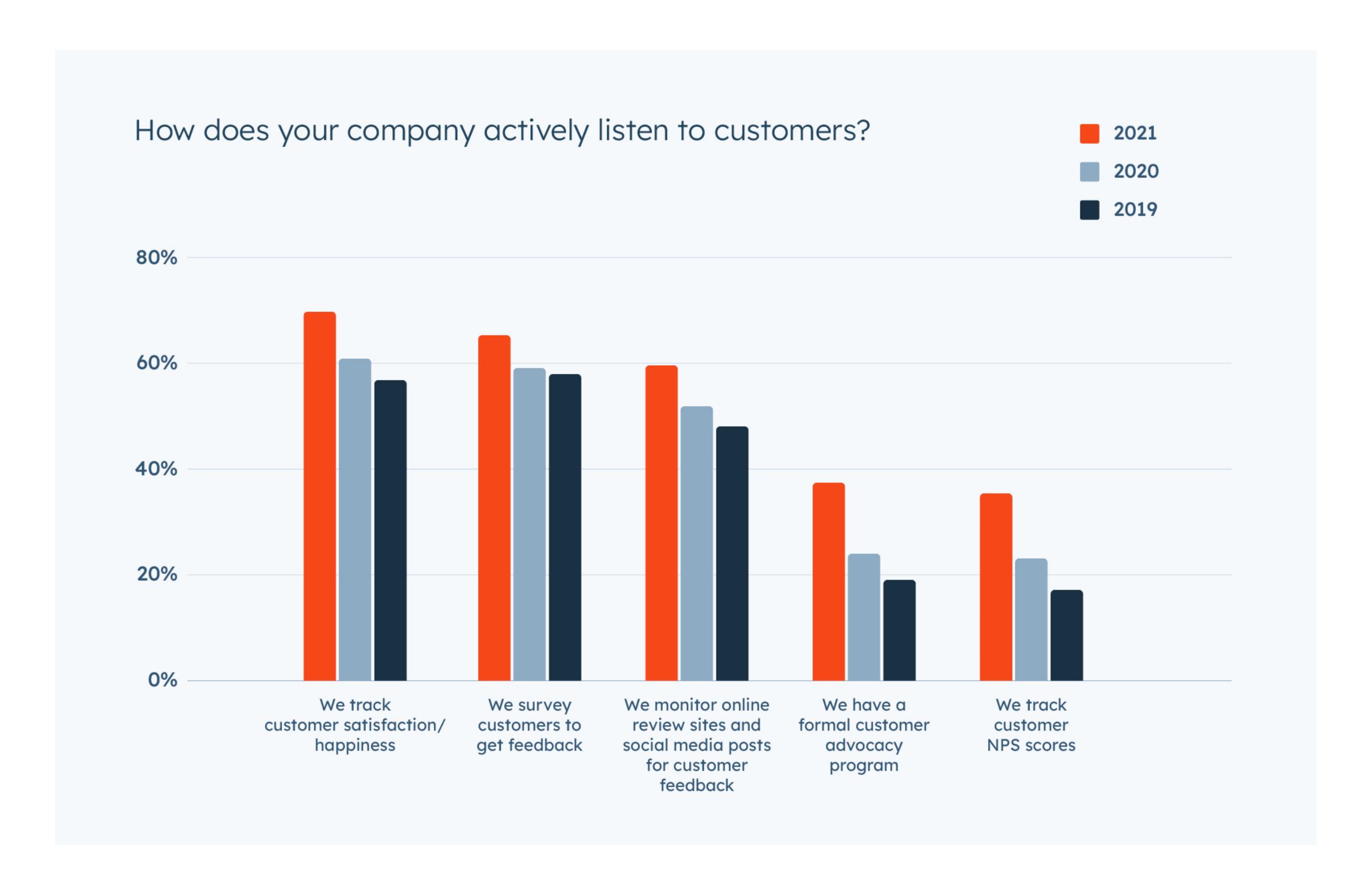
It is worth emphasizing that service organizations must first truly understand their customers. We asked respondents to consider the ways they are listening and learning from their customers. Compared to previous years, 2021 saw the highest self-reported engagement in seeking feedback across each method included in our survey, with the top methods staying consistent since 2019. Out of all respondents, 70% reported that their organizations are tracking customer satisfaction/happiness and 65% of respondents also indicated that they survey customers. Surveying is an effective way to assess how successful your team is in delivering on the expectations and needs of your customers.

Customer Feedback Surveys

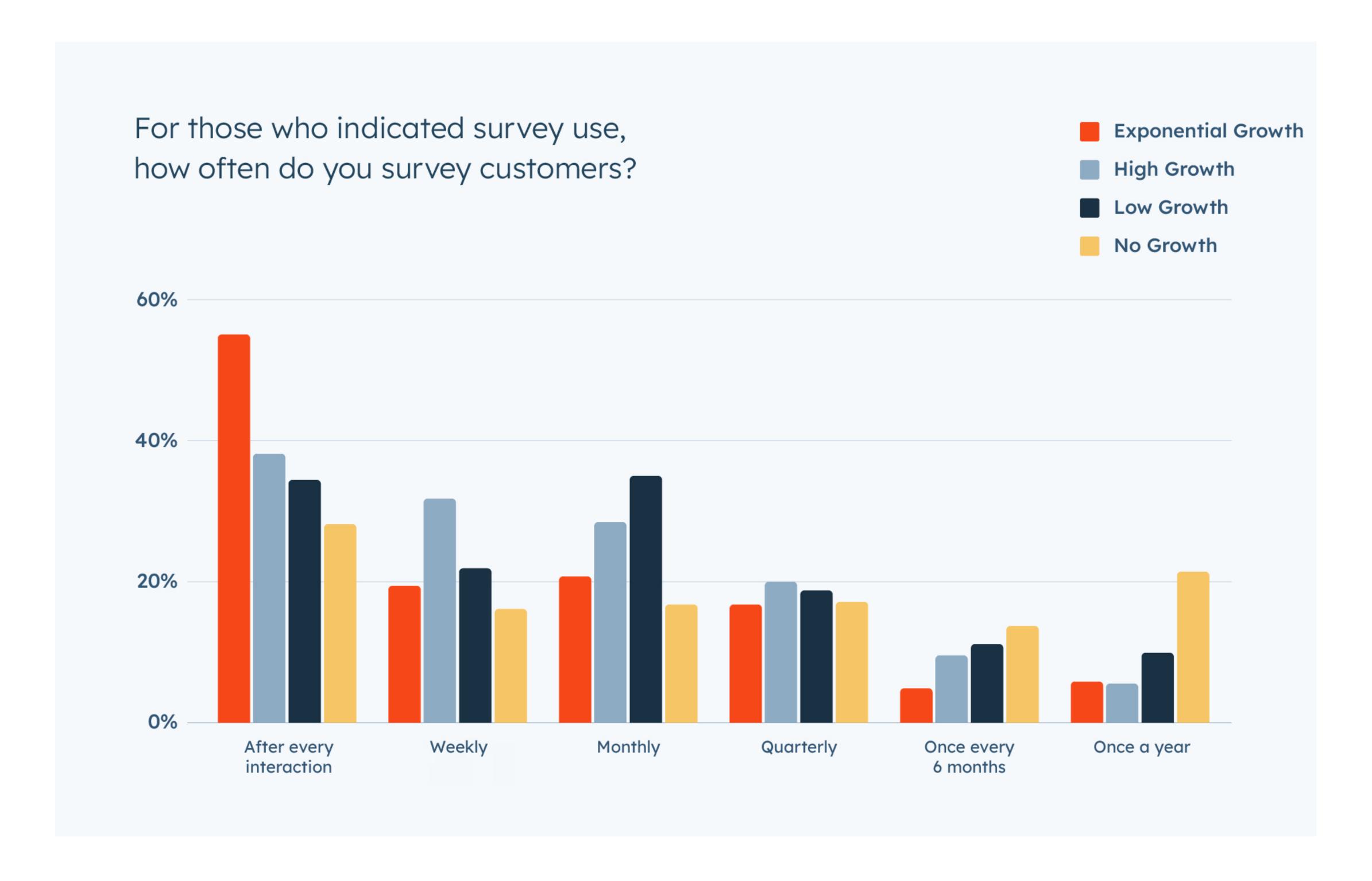
Customer feedback surveys are a great way to make your customers feel heard and valued across their customer journeys, from sales to service and every moment in between. Survey insights can help you better understand your customers and identify opportunities for improvement in service delivery – ultimately contributing to a better customer experience and more customer delight. Surveys can target service KPIs such as net promoter score (NPS), customer effort score (CES), and customer satisfaction (CSAT) to assess customer loyalty and retention. Some feedback software even allows you to build custom surveys, where you can tailor your questions to reflect your unique business needs and gain targeted insights.



Beyond tracking customer satisfaction and sending feedback surveys, 60% of respondents also reported leveraging review sites and social media as a way to gather feedback and listen to their customers. We want to note that there was a significant increase with the number of respondents reporting using customer advocacy programs and customer NPS scores. Less than 20% of respondents had a formal customer advocacy program in 2019 compared to more than a third of respondents reporting using such a program in 2021. Similarly, tracking NPS scores as a way to listen to customers more than doubled from 17% of respondents in 2019 to 36% of respondents in 2021.



Next we asked those who indicated that they survey customers how often they send out surveys. The frequency varied across growth cohorts, with more frequent surveying practices aligning with higher self-reported growth. Of the exponential growth respondents, 55% reported surveying customers after every interaction, compared to 38% of high growth and 34% of low growth respondents. Weekly surveying had the highest percentage of respondents from the high growth cohort (32%) while monthly surveying had the highest percentage of respondents from the low growth category (35%). The no growth respondents reported surveying only once a year, the most of any growth cohort. These results indicate that growth is correlated with higher survey usage.

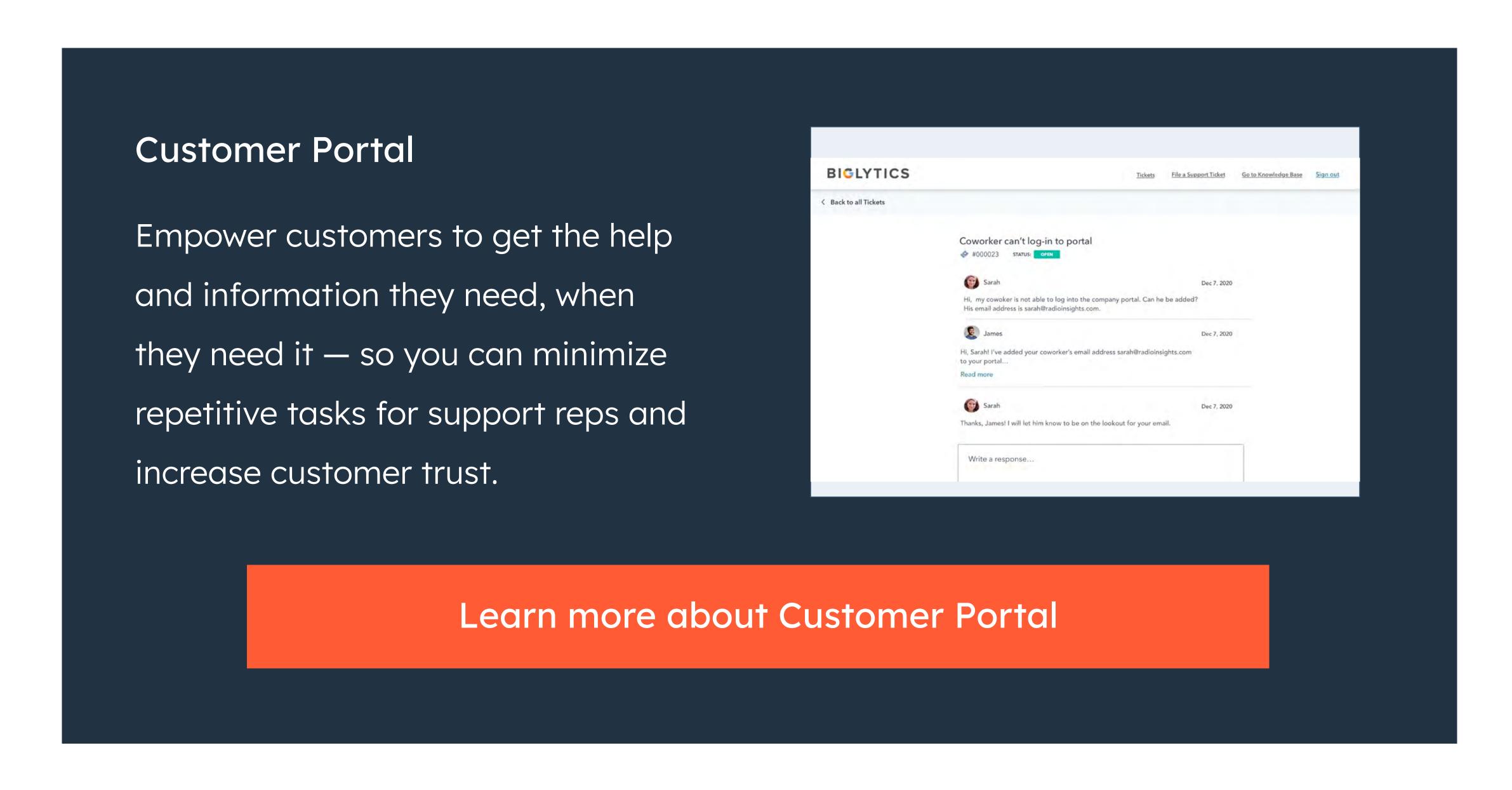


In summary, the increased frequency of feedback indicates that customer service teams and leaders understand that listening and understanding customers – their needs, preferences, and sentiments – is critical to customer service organizations' responsibilities and success. Making your customers feel heard and valued is one way your customer service teams can communicate appreciation toward your customers, even at times when they are feeling frustrated or in need of help.

In fact, these triage moments might be the most critical times to really create genuine and authentic interactions with your customers. At such moments in a customer's journey, customer service teams should be enabled to deliver exceptional service through timesaving tools, collaborative solutions, and flexible channels for customers. Customers increasingly prefer opportunities to own their service experience. Gartner reports that 70% of customers use self-service channels at some point in their resolution journey (Gartner). Customer portals compliment knowledge bases as channels for self-service and visibility into one's inquiries.

Customer Portal

Customer portals give customers agency and ownership of their service experience by serving as a central resource where customers can review the status of their tickets, follow up with additional questions, and access the knowledge base for further resources. Using a customer portal not only creates transparency and trust for your customers, but also helps your service teams coordinate responses – ultimately saving your agents time so they can focus on solving for their customers.



Perhaps most importantly, customer service leaders need to ensure that their teams have access to robust customer data so that customers are not burdened with getting several agents up to speed on their issues. Being equipped with accurate and relevant information in the moment when your customer is engaging with you is another way you can deliver on customer expectations. Coupling the CRM with customer feedback and self-service tools can enhance customer insights and empower meaningful engagement. Fully equipped, customer service leaders and teams can evolve service from reactive management to proactive customer experience delight.

Looking Ahead Beyond 2022

Looking Ahead Beyond 2022

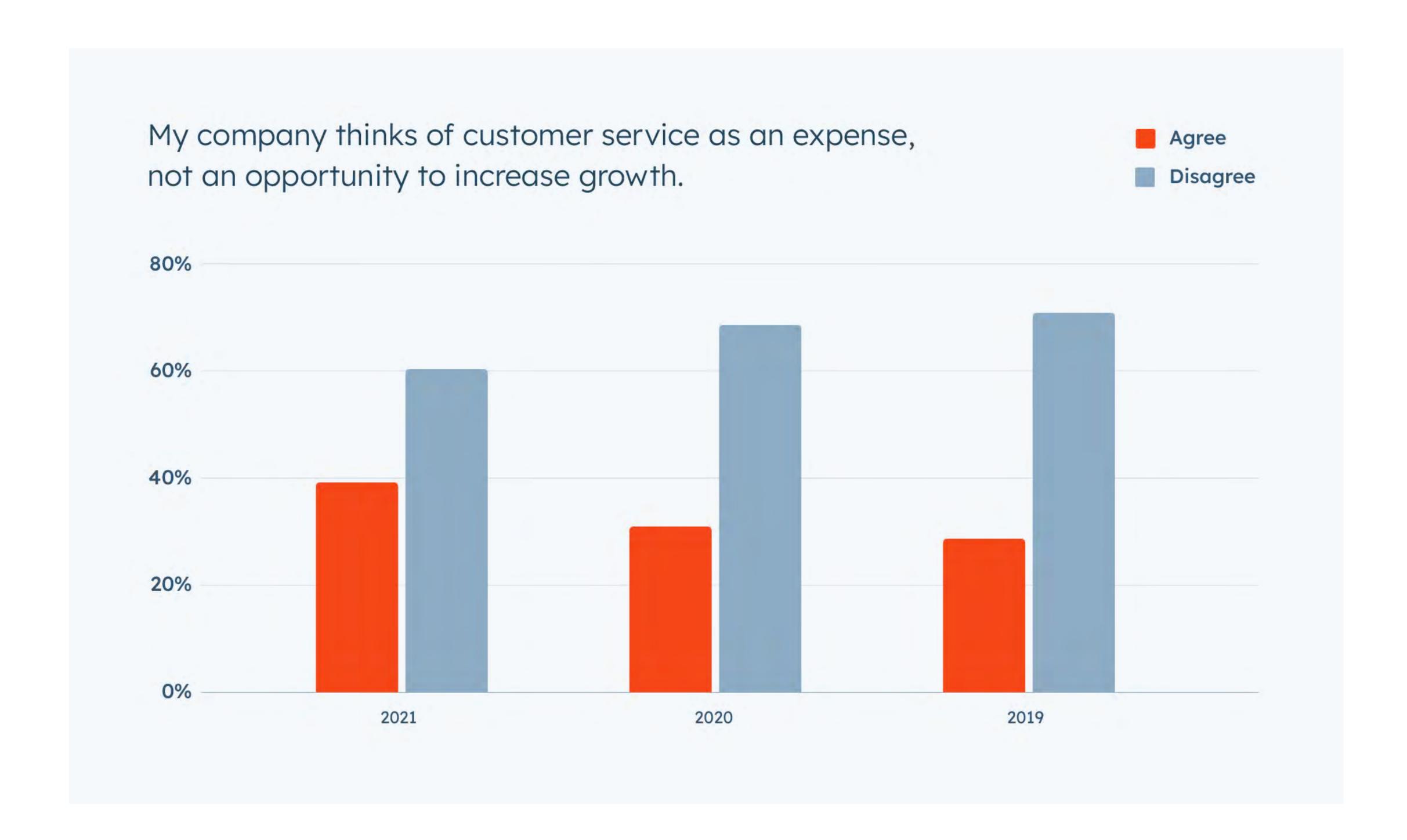
We asked respondents to identify their top three priorities for their departments going into 2022. The three priorities that had the highest number of responses mirrored 2020's projections looking forward into 2021: creating a great customer experience (45%), customer success (37%) and retaining customers (35%). Customer engagement came in a close fourth at 33%. We would like to note that these priorities go beyond the myopic perception that customer service is a largely reactive, triage function in companies. Customer experience is only made possible by proactive service strategy and implementation.

In fact, when our survey respondents were asked what their teams' were responsible for, "proactive customer service" was the responsibility with the highest response rate at 51%. The next two most popular responses were customer retention (47%) and account management (45%). These results indicate that customer service leaders see their teams and their own positions as proactive players in customer relationship management. This view counters the narrow view that customer service is a siloed, point-in-time customer touch point that has limited implications elsewhere in a customer's experience. Customer service leaders recognize that their work is fundamentally connected to a customers' ongoing engagement and satisfaction with their company. This connectivity opens opportunities for service to provide unique insights into customer needs, wants, and preferences across the customer journey.

Returning to the 2022 priorities, it is interesting to note that retaining customers was in the top three cited priorities, while "saving costs/cost reduction" was sixth based on the percentage of respondents selecting those priorities (24.5%, a 10-point drop from 2020).

Retaining customers is one way to reduce costs and drive stronger revenue: acquiring new customers can be 5 times more expensive than retaining existing customers (Harvard Business Review). Department prioritization seems to favor a revenue-driving activity as opposed to an expense-centric objective.

This is an encouraging counterpoint to our survey finding an increasing number of respondents considering service as an expense: up to 40% in 2021 from 32% in 2020. This trend is worrying when considered alongside the finding that 30% of respondents cited lack of budget as a challenge for their team. Further education and recognition around customer service's impact on revenue driving activities could alleviate budget pressures and inspire further investment in tools and systems supporting customer service teams. Customer service has the potential to drive improved customer loyalty and retention, formidable revenue levers. We hope to see a reversal of this expense-viewpoint trend in the coming year in light of the reported 2022 priorities.



Training also ranked higher for 2022 priorities compared to the previous year. When asked to report on upskilling, our survey respondents were nearly evenly distributed across frequency of how often they are actively learning new skills for their roles: "a few times a month or more often" (32%), "about once a month" (30%), "a few times a year" (28%).

Of note, the exponential growth segment showed the highest percentage of respondents reporting that they engaged in learning at least a few times a month at 50%, 26 points higher than the high growth and 29 points higher than the low growth groups.

The leading method for learning and training was peer relationships, with 54% of respondents reporting this as a way they learn, followed by 50% of respondents selecting attending conferences (including virtual). Along a similar theme of learning from others, learning from formal mentors was selected by 39% of respondents. These findings indicate the importance of team structures and processes that allow for collaboration, information sharing, and shared learning. It isn't unreasonable to consider how important it is to continue to foster these learning methods in our hybrid working world, with remote-friendly environments still necessitated by COVID-19.



The priority "creating a customer feedback program" was up four points to 21% compared to last year, trailing behind saving costs/cost reduction by only three points, while "building self-service solutions" increased five points to 15%. Though "leveraging predictive analytics" was the least frequently cited priority for 2022 (10%), we predict this will continue to grow in importance as market trends with customer insights and machine learning evolve.

Conclusion

Conclusion

The year 2021 was exceptionally challenging for all of humanity, including customer service leaders charged with the thoughtful care of the customers whose expectations were only outmatched by their emotions. We hope you found valuable insights in this year's HubSpot State of Service Report and that our findings can empower you, your teams, and your organizations in providing authentic customer experiences and enabling collaboration among customer service professionals. Customer expectations continue to set a high bar for service delivery that is efficient without sacrificing quality and personality. With that, it is as important as ever for customer service leaders to invest in tools, systems, and processes that support teams as they help customers when, where, and how they need it most.

Service leaders and agents alike face challenges, including time constraints, with increasing demands for efficient resolutions against the backdrop of real-time expectations.

Fortunately, technology continues to iterate tools such as tickets and SLAs to help teams save time on manual tasks and dedicate their energy to solving for their customers with agility.

Beyond time-saving tools, flexible channels and collaborative systems are critical for service teams. Customers now have the flexibility of choice in where they reach out to support, with live chat and self-service resources on knowledge bases. Connected tools like help desks and shared email aliases, powered by the CRM, create a single-source of truth for all customer engagements and reduce redundant or missed follow-ups. Better yet, with a CRM, customer notes and learnings can be leveraged in other teams, such as sales, marketing, and more.

Now more than ever, companies and their customer service teams are listening to customers to understand what customers need, want, and could go without. Customer feedback channels such as surveys allow customer insights to be transformed into actionable improvements in the end-to-end customer experience. Customer service teams can go a step further with infusing agency into customer service by leveraging a self-service online customer portal. With each opportunity for choice and feedback, customers feel heard and valued as not only a customer but as an individual too.

As we look forward to 2022 and beyond, we hope customer service leaders and teams continue to lean into their roles and impact on the end-to-end customer experience. As proactive players in customer experience, customer service professionals are uniquely positioned to share and leverage their heightened understanding of the customer to both provide better service and empower colleagues across front-office teams. At HubSpot, we believe we are moving from an "or" world to an "and" world. With easy to use tools, service teams deliver efficiency and empathy with each customer interaction. With connected channels, customers experience flexibility and authenticity regardless of where they go for support. Customer service teams will continue to be leaders exemplifying the importance of taking care of one another – be it prospects, customers, or colleagues – which is a future we can all get behind.

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