

Gartner for Customer Service & Support

Proactive Customer Service Is Valued by Customers, Despite What They Say

Published 28 September 2020
ID G00733842

Proactive Customer Service Is Valued by Customers, Despite What They Say

Published 29 May 2020 - ID G00727073 - 6 min read

By Analysts [Customer Service and Support Research Team](#)

Initiatives: [Customer Service Experience and VOC](#)

Based on a survey of 6,000 customers, this report provides insight on the prevalence, perception and value of a proactive customer service campaign. We examine how proactive service affects customer service metrics, customer preferences and implications for customer service and support leaders.

Overview

As customer service organizations increase their digital footprint and launch new channels, the exploration into proactive customer service is on the rise. Implementing a successful proactive initiative can be difficult and costly without a strong understanding of customer preferences. We surveyed over 6,000 customers to understand how proactive service impacts customer service outcomes including customer effort, value of the service provided and satisfaction. This report will cover key trends to help customer service and support leaders create an actionable and effective proactive customer service plan.

Key Findings

- Proactive customer service is an underused tactic, with only 13% of customers in our sample reporting that the company reached out proactively.
- Though customers report a preference for reactive service, proactive service results in significantly better customer experience outcomes, such as lower effort and higher satisfaction, Net Promoter Score (NPS) and perceptions of product value.
- While proactive service is generally perceived as lower effort and more valuable than reactive service, the best service outcomes result from outreach with a clear benefit to the customer, such as to resolve an issue or renew a purchase.
- Exposing customers to proactive service substantially increases their preference for it.

Customer Service's Current Proactive Engagement

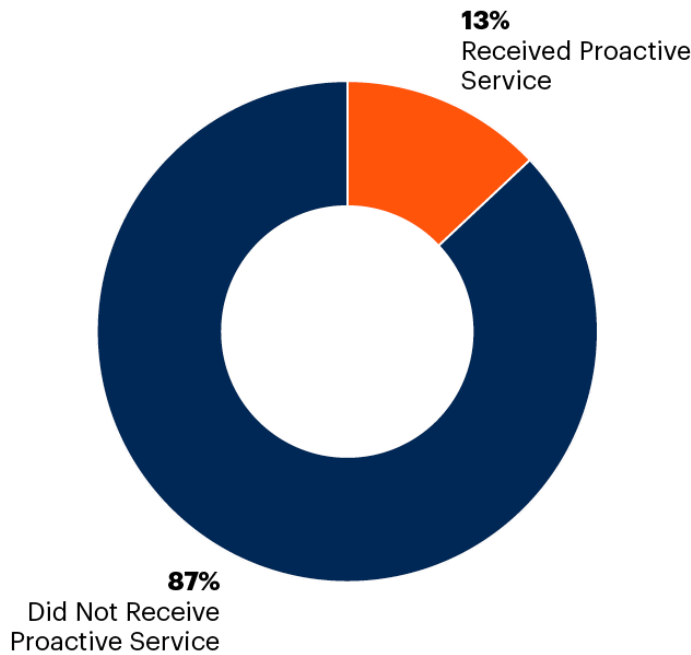
With the rise of digital channels and advances in technology, customer service and support (CSS) organizations are ramping up exploration of proactive customer service. Creating an effective proactive campaign is a win-win for CSS organizations and customers, providing benefits to both parties, specifically:

- Significant cost advantages to proactive engagement, through reduction of incoming calls, higher engagement with self-service channels and reduction in aggregate talk time.
- Customers are preemptively made aware of issues, which increases customer satisfaction and lowers effort, resulting in a better customer experience.

Despite these potential benefits, proactive service remains a nascent service tactic. In fact, we predict that by 2023, only 30% of customer service and support organizations will have a proactive campaign (see “[Predicts 2020: CRM Customer Service and Support](#)”). We wanted to understand the prevalence and customer reaction to proactive customer service in 2020. To do so, we surveyed more than 6,000 customers from the U.S., U.K., Australia, Singapore and New Zealand who interacted with customer service organizations in the last 60 days. Each customer was asked about the reason for contact, the contact characteristics and the outcomes. Currently, only 13% of the 6,004 customers surveyed report receiving any type of proactive customer service (see Figure 1).

Figure 1. Customers Receiving Proactive Customer Service

Customers Receiving Proactive Customer Service



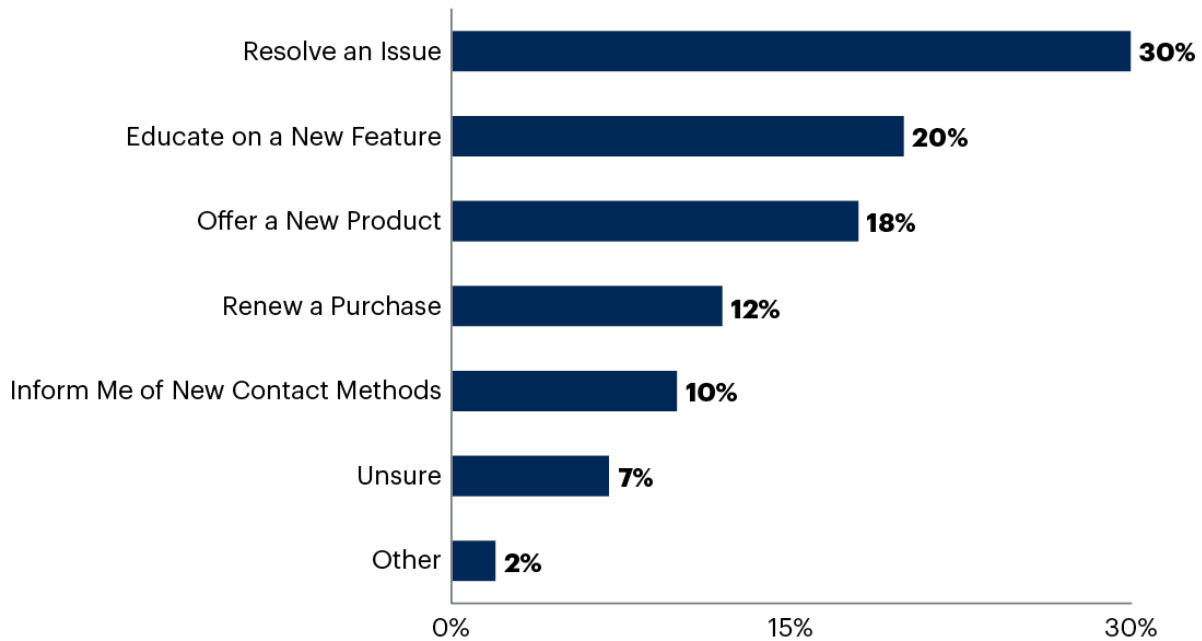
n = 6,004
 Source: Loyalty Through Customer Service and Support Survey
 727073_C

A further look into the 13% of contacts allows customer service and support leaders to understand what kind of proactive customer service that customers are receiving today. Currently, the most frequent (30%) reason for proactive contacts is alerting customers to an issue with the product or service (see Figure 2). The next two top reasons are communicating new features (20%) of an existing product or service and offering a new product or service (18%). Interestingly, 10% of

customers report being confused or unaware of the reason for customer service to contact them at all.

Figure 2. Top Reasons for Proactive Service

Top Reasons for Proactive Service



n = 756

Source: Loyalty Through Customer Service and Support Survey

Note: Percentages may not add up to 100% because of rounding.

727073_C

There is a fairly even distribution of contact types, suggesting that CSS organizations are still experimenting with proactive service to determine the best use cases. Without an understanding of the most cost-effective and valuable reasons to engage a customer proactively, CSS leaders risk harming the customer experience and incurring unnecessary cost.

Proactive Service Results in Significantly Better Customer Experience Across the Board

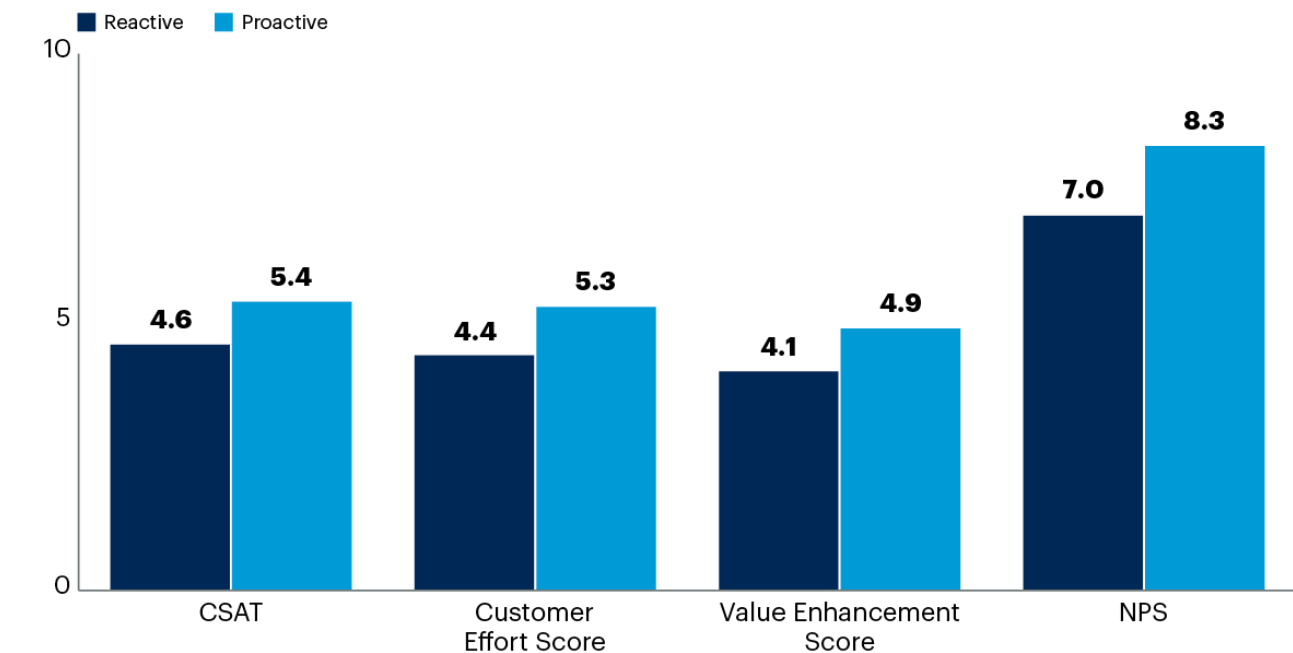
Metrics, such as Customer Satisfaction Score (CSAT), Customer Effort Score (CES), Value Enhancement Score (VES, see [“Driving Customer Retention and Loyalty Through Service”](#)) and NPS, are an integral part of assessing a CSS organization’s effectiveness. A CSS leader may be hesitant to start proactive customer service fearing that scores on key metrics may fall well below current averages.

To evaluate the effect proactive service has on these metrics, we compared the average score of customers who received proactive service to the average score of customers who did not (see Figure 3). Results consistently show that customers who receive proactive customer service view their interactions more favorably. A closer look into the metrics shows nearly a 1 point increase in CSAT, CES, VES and NPS.

Figure 3. Customer-Centric Metrics

Customer-Centric Metrics

Proactive Versus Reactive Customer Service



n = 6,004

Source: Loyalty Through Customer Service and Support Survey

727073_C

This suggests that due to the proactive nature of the service interaction, customers feel a greater sense of appreciation toward the CSS organization. This results in higher scores across the board compared to scores from customers who have to take the initiative to reach out to CSS. We have consistently found that a one-point increase in metrics has major implications on customer loyalty—boosting retention, wallet share and positive word of mouth.

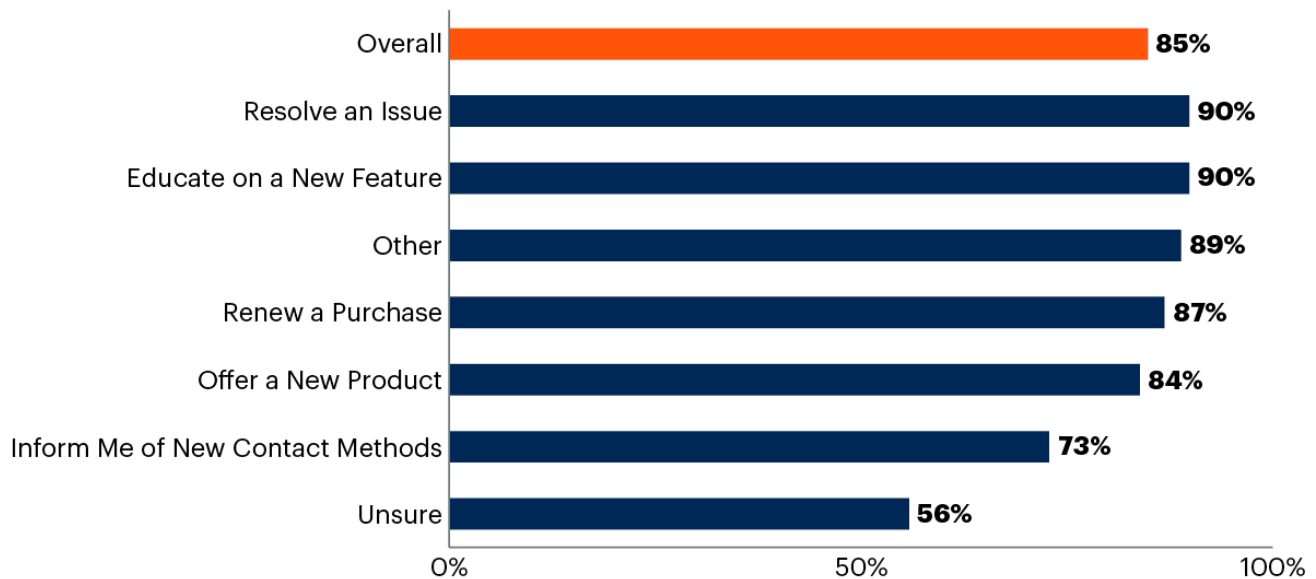
To Succeed, Proactive Service Must Present a Clear Outreach Reason for the Customer

In addition to tracking responses to key CSS metrics, we also asked customers how valuable they felt the customer service experience was for them (see Figure 4). An overwhelming majority of customers rated their experiences as valuable (85%).

Figure 4. Was the Proactive Service Valuable?

Was the Proactive Service Valuable?

Overall and by Contact Reason



n = 756

Source: Loyalty Through Customer Service and Support Survey

727073_C

While proactive service, in general, results in customers considering the experience valuable, differences exist depending on the underlying reason for that proactive contact. Ninety percent of customers found proactive service valuable when they received it to resolve an issue or learn about a new feature of a product or service. However, customers' perceived value was significantly lower (56%) when the CSS organization did not make the reason for the contact clear. Additionally, perceived value was relatively lower (73%) if the reason for proactive outreach was to inform the customer of new contact methods. Customer service and support leaders have a major opportunity to provide valuable customer service through a proactive channel, but they must be careful to create a clear and purposeful reason for contacting a customer to ensure the value.

Customers Reaction to Proactive Service

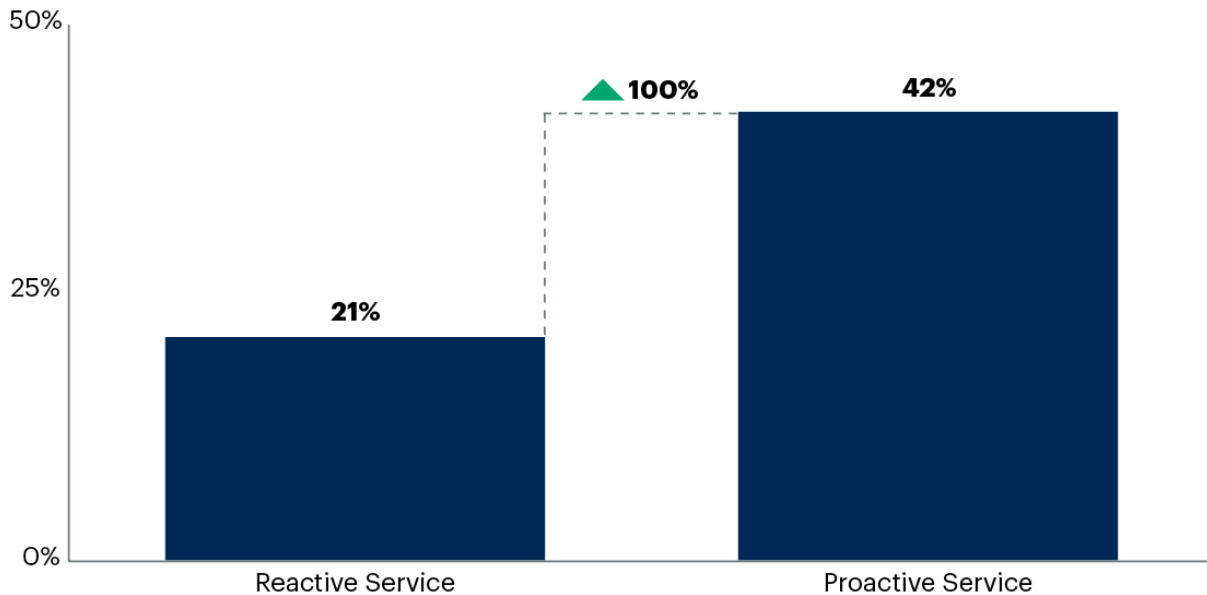
We asked the 87% (n = 5,248) of customers who did not receive any type of proactive service whether they would prefer to receive proactive service or reach out to customer service themselves (see Figure 5). Surprisingly, less than a quarter of customers reported that they would prefer to receive proactive customer service (21%). Yet, when compared to customers who had previously received proactive customer service, we see that number double (42%). This finding suggests two important implications for customer service leaders.

First, customers' attitudes toward proactive service rely heavily on a customer receiving some sort of proactive service. Those who received proactive service view it much more favorably than those who did not. Secondly, even customers who receive proactive service report a preference for reactive service, despite higher VES, CSAT, NPS and lower CES when receiving proactive service.

This suggests a disconnect between customers' stated preferences and what yields the best outcomes for them.

Figure 5. Percentage of Customers Who Prefer Proactive Service

Percentage of Customers Who Prefer Proactive Service Reactive Versus Proactive



n = 6,004

Source: Loyalty Through Customer Service and Support Survey

727073_C

Conclusion

It is clear that taking the initiative to reach out to your customers proactively provides a major opportunity for customer service organizations. Along with the cost optimization benefits of reducing call volume and increasing engagement with self-service channels, the customer experience greatly benefits. Customers rate the experience much higher on all key metrics, indicating a real opportunity to boost retention and other loyalty outcomes. In addition to a significant boost in metrics, customers themselves find these activities valuable.

When reaching out to a customer proactively, we recommend that customer service organizations provide a clear reason, that focuses on the customers' needs, for the contact. Additionally, though customers may report an aversion to proactive service, the customer experience is better and customers' preference for proactive service increases with exposure.

About This Research

Our Loyalty Through Customer Service and Support Survey collected data from 6,004 customers throughout six different countries to understand the customer service interaction and how it affects customer preferences in the future.

Of the 6,004 customers surveyed, 756 received proactive service.

© 2020 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."

[About Gartner](#) [Careers](#) [Newsroom](#) [Policies](#) [Privacy Policy](#) [Contact Us](#) [Site Index](#) [Help](#) [Get the App](#)

© 2020 Gartner, Inc. and/or its Affiliates. All rights reserved.

About Gartner

Gartner is the world's leading research and advisory company and a member of the S&P 500. We equip business leaders with indispensable insights, advice and tools to achieve their mission-critical priorities today and build the successful organizations of tomorrow.

Our unmatched combination of expert-led, practitioner-sourced and data-driven research steers clients toward the right decisions on the issues that matter most. We are a trusted advisor and an objective resource for more than 14,000 enterprises in more than 100 countries — across all major functions, in every industry and enterprise size.

[Learn more \[gartner.com/en/customer-service-support\]\(https://www.gartner.com/en/customer-service-support\)](https://www.gartner.com/en/customer-service-support)