

GLOBAL SURVEY INSIGHTS

Inside customer experience for manufacturing

Crafting seamless customer ecosystems and experiences



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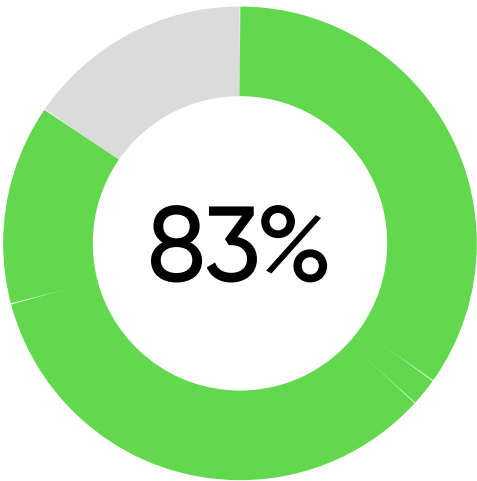
Elevating sales and service experiences for customers and manufacturers

As customer expectations are evolving, manufacturers are under pressure to improve customer experiences and increase profitability. They must also invest in new, innovative recurring revenue models that drive growth and create value with convenient, personalized services.

In 2023, ServiceNow led a global survey of 1,900 manufacturing leaders to uncover how they implement winning strategies to elevate customer experience. The survey reveals that manufacturers highly prioritize and invest in improving processes for both sales and after-sales services to provide great customer experiences.

Why? The reality is that delivering a great customer experience in manufacturing isn't just about supporting and servicing customers after the sale is complete. Equally important is producing a positive experience across the sales and order fulfillment process. Getting this part wrong can decrease customer satisfaction and loyalty.

Our survey shows that manufacturers are willing to invest almost equally in improving core processes of traditional services and new business models or services. In fact, **40% say increasing the profitability of existing services is a priority outcome, as compared to unlocking new revenue from servitization business models at 29%**. Making sure current offers are profitable before investing in new services is key.



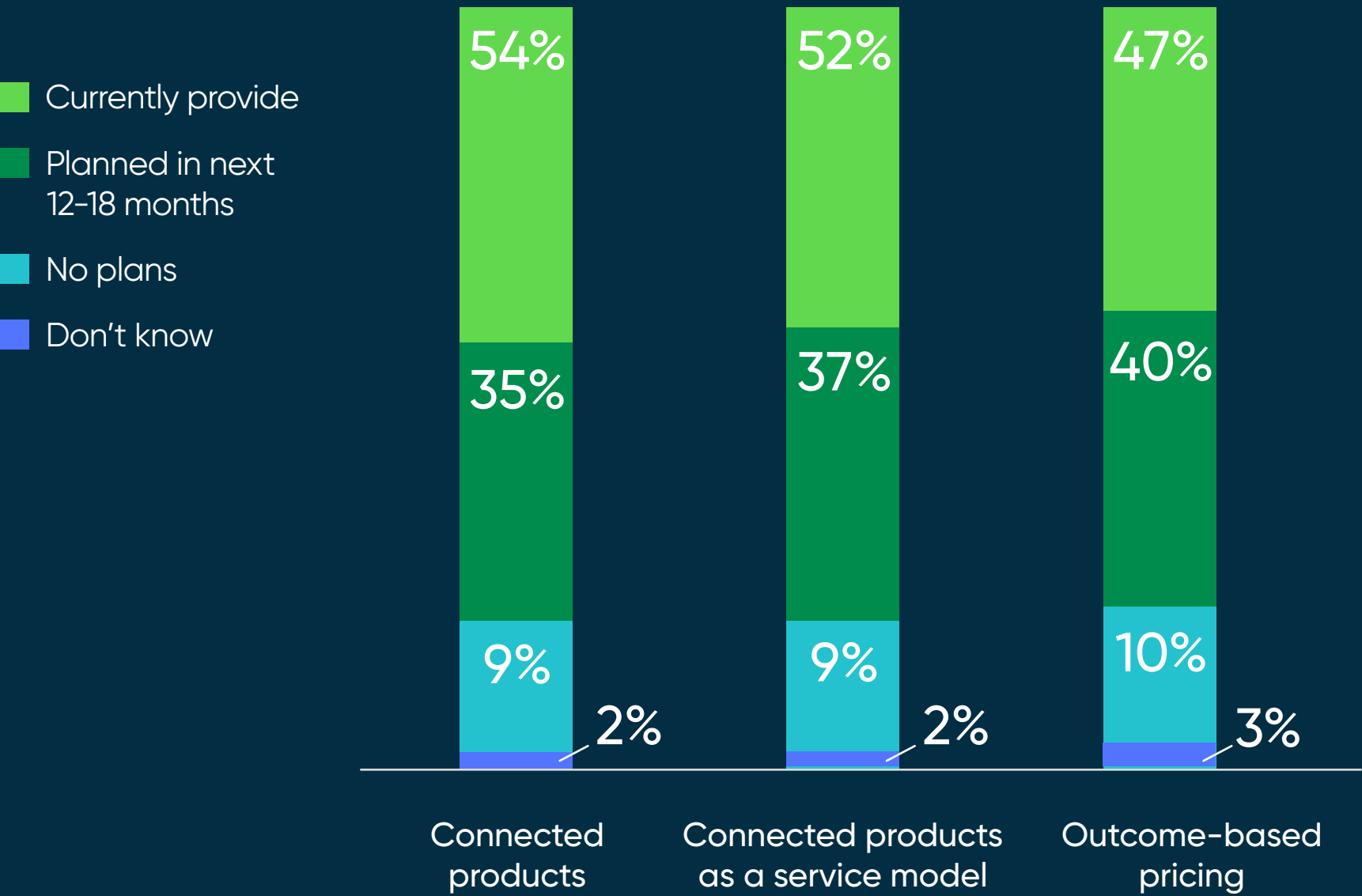
of manufacturers place a high level of focus and investment on improving both customer sales and service experiences

Decoding manufacturing challenges

To help manufacturers in their quest to deliver frictionless experiences across the entire customer journey and increase product uptime and performance, we uncover the challenges manufacturers must overcome. We also learn how they are navigating technology investments to meet their priority outcomes, while positioning themselves to innovate new service-based revenue streams.

Roughly half currently provide these services to their customers, and those who do not are likely to add them soon

% of total

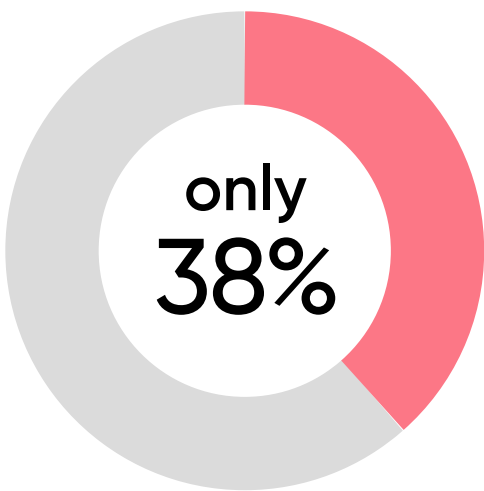
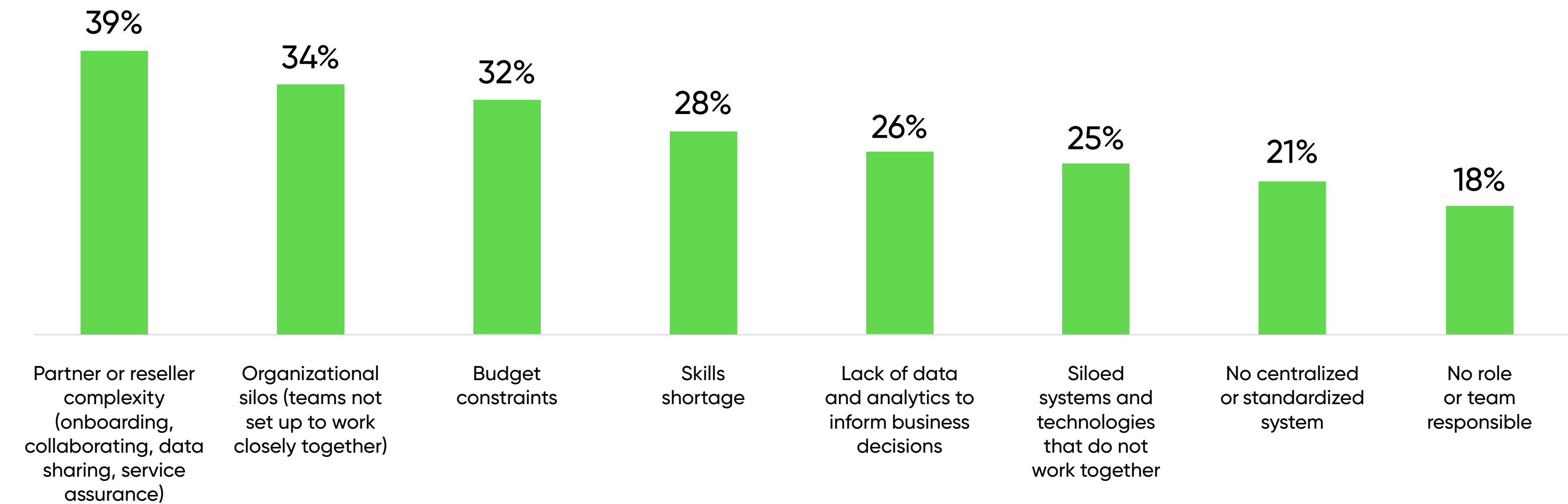


Navigating complexity: Barriers to seamless experiences

The manufacturing sales and service motion remains full of friction, yielding an uneven customer experience (CX). Organizational silos, a shortage of useful data and analytics, and disconnected systems and technologies are among the top factors manufacturers say impact their ability to improve customer service and lead to slow growth and increased costs.

Whether improving sales or after-sales service, the biggest barrier by far to improving CX is partner or reseller complexity.

Manufacturers report the following challenges that prevent great customer experiences



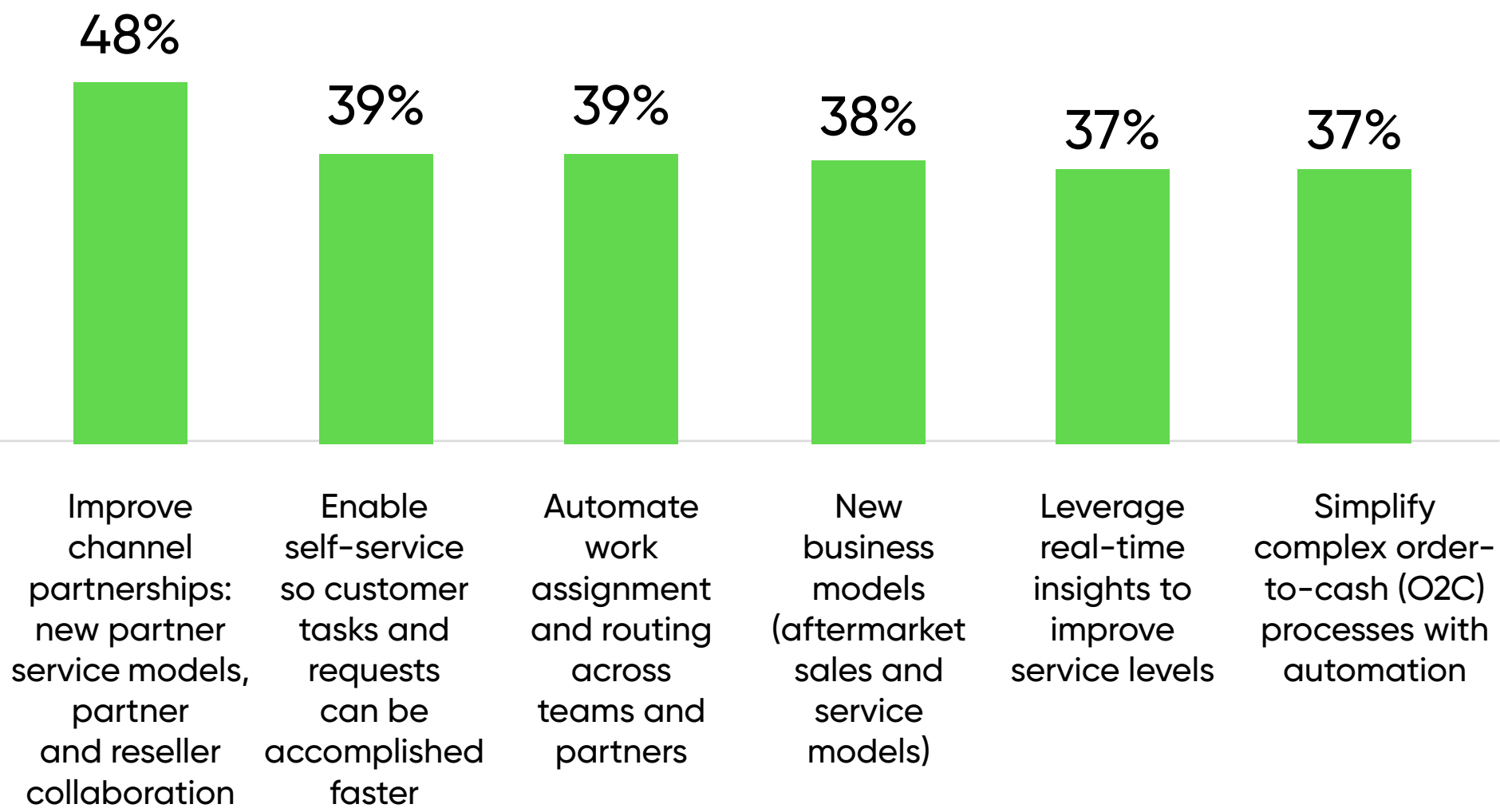
of manufacturing leaders believe the existing processes have a positive impact on the customer

How manufacturers confront and conquer CX challenges

The ServiceNow survey reveals that manufacturers see opportunities to improve channel partnerships, eliminate siloes, automate work, and tap into data more effectively.

Areas of customer sales and service experience targeted for investment or improvement

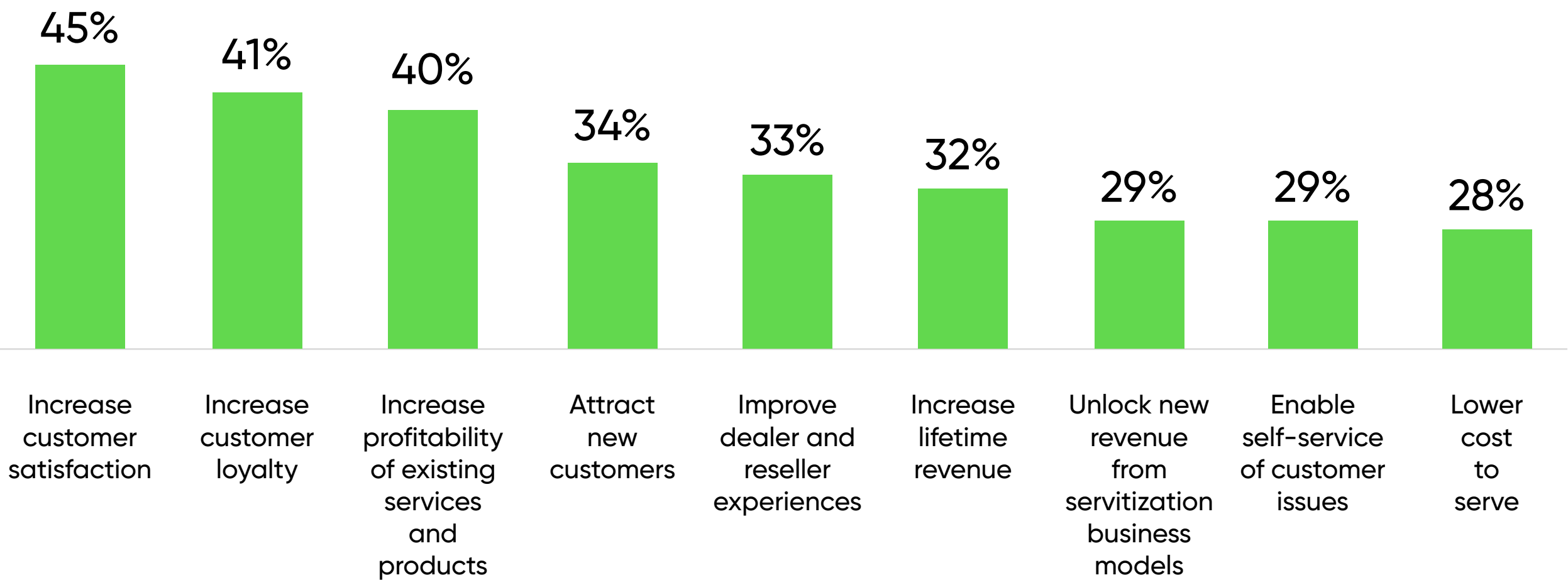
(% of total)



The top outcomes manufacturers prioritize are to increase customer satisfaction and customer loyalty by improving customer sales and service functions.

Desired outcomes by improving customer sales and service

(% of total)



Simplify, connect, optimize: Streamline operations to drive growth

Driving results from targeted investment areas requires an ecosystem mindset: investing time and resources to understand what the customer requires. Today, streamlining the customer experience from purchase to service is more important than ever, so every touchpoint is as frictionless as possible.

The goal of manufacturers is to make everything easier—for both customers and employees. All external and internal value chain partners should work together seamlessly. This can be achieved by investing in customer self-service and by automating work across back-office teams and partners.

With an automated platform that unites your entire customer ecosystem, manufacturers can successfully secure multiple benefits, including:

- Automating complex order management and order exceptions processes
- Adopting on-demand insights to improve service levels
- Enabling self-service for customers
- Providing predictive and proactive field service
- Creating an intelligent workspace for customer-facing teams

Leader insight

“

Quality companies know they don't just deliver products, they deliver experiences. Digital transformation enables beautiful, effortless experiences that depend on automation, AI, and self-service tools.”

CEO, Industrial Manufacturer, Germany

Improve customer and dealer experiences

To grow company revenue, manufacturers must optimize and expand distribution models. However, delivering effortless experiences is useless if they are not repeatable.

The biggest barrier by far to improving CX is partner or reseller complexity, including onboarding, collaborating, data sharing, and service consistency. Manufacturers also say this is their top targeted area for improvement. In addition, ensuring that customers, no matter where they are, receive the same frictionless sales and service experience through partners is undeniably a main priority for manufacturers.

"Your partner and resellers are an extension of your brand," says Allen Hackman, global head of manufacturing industry solutions at ServiceNow. "Setting them up for success is critical. You have to give them a great service so they can, in turn, provide an exceptional service to your end customers."



Automation and AI unlock the benefits of seamless collaboration with dealers, resellers, and service providers

- **Increase agility and speed to market:** Automate reseller onboarding with standardized and easy-to-deploy service models that ensure order support processes.
- **Streamline support services:** Optimize reseller and dealer experiences and allow them to adopt new ways of working with customers for related support functions.
- **Generate new and better insights:** Measure and improve the value manufacturers deliver to resellers and customers with end-to-end visibility.

Your path to efficiency and extraordinary customer experiences

Digitalizing customer interactions is just one part of the puzzle for manufacturers aiming to reach their full potential. By streamlining interactions across internal and external partners in the value chain, manufacturers unlock optimum efficiency, maximizing profitability in both existing services and introducing new service revenue streams. Manufacturers who leverage a unified platform experience heightened customer satisfaction and loyalty by streamlining and simplifying the customer journey.

Revolutionize your manufacturing journey

With ServiceNow, manufacturers can automate end-to-end order management, support, and service operations, enabling new business models while reducing the cost to serve.



It's time to prioritize profitability, elevate efficiency, and streamline customer journeys with AI-powered automation and unified solutions.

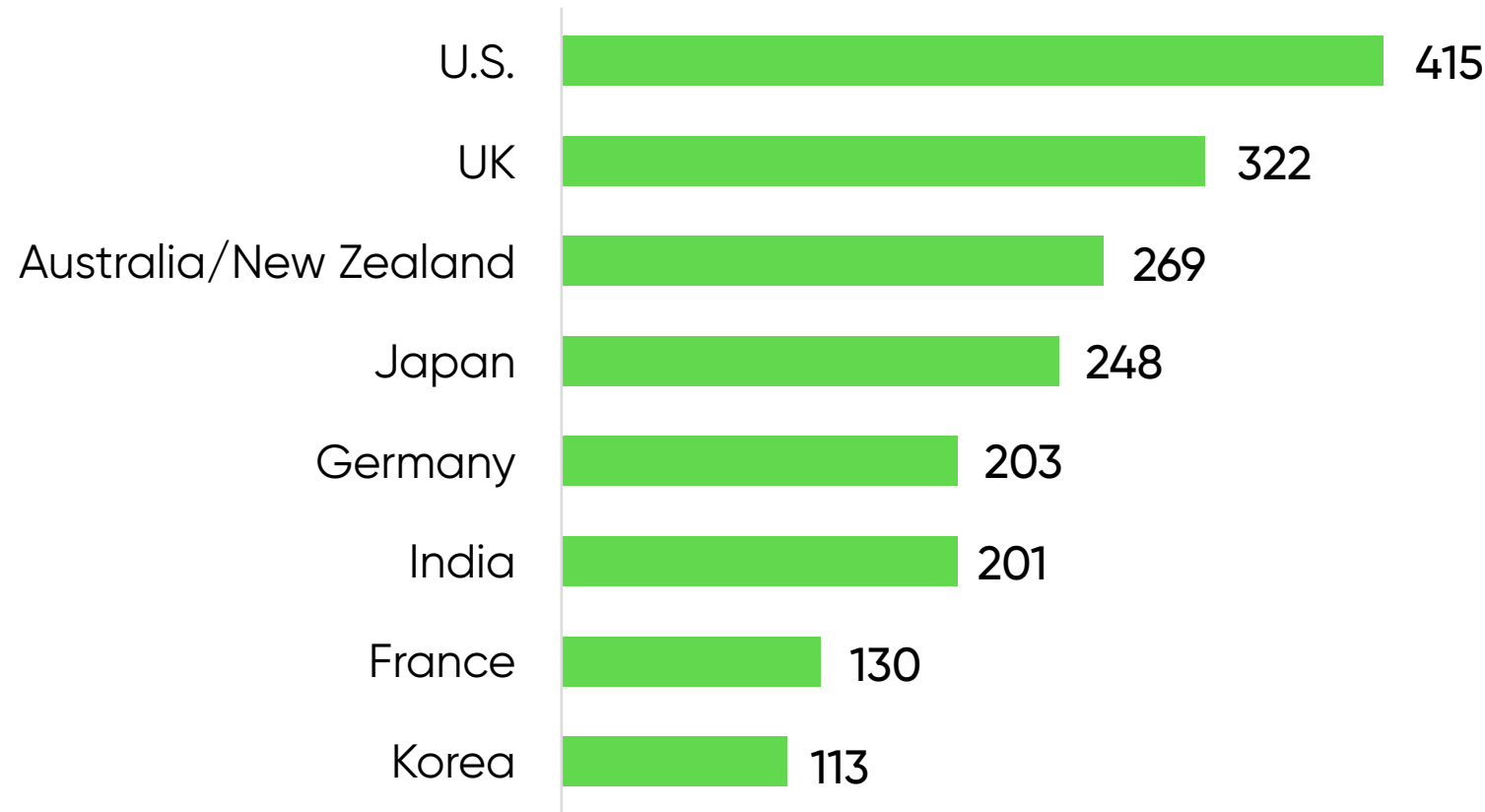


About this survey

ServiceNow engaged Dynata to conduct a global survey of manufacturing executives. It evaluated how manufacturers are using digital transformation to drive outcomes and manage macro uncertainty across the value chain.

Responses from 1,901 respondents were collected via online surveys conducted between March 13 and April 13, 2013.

Global respondents

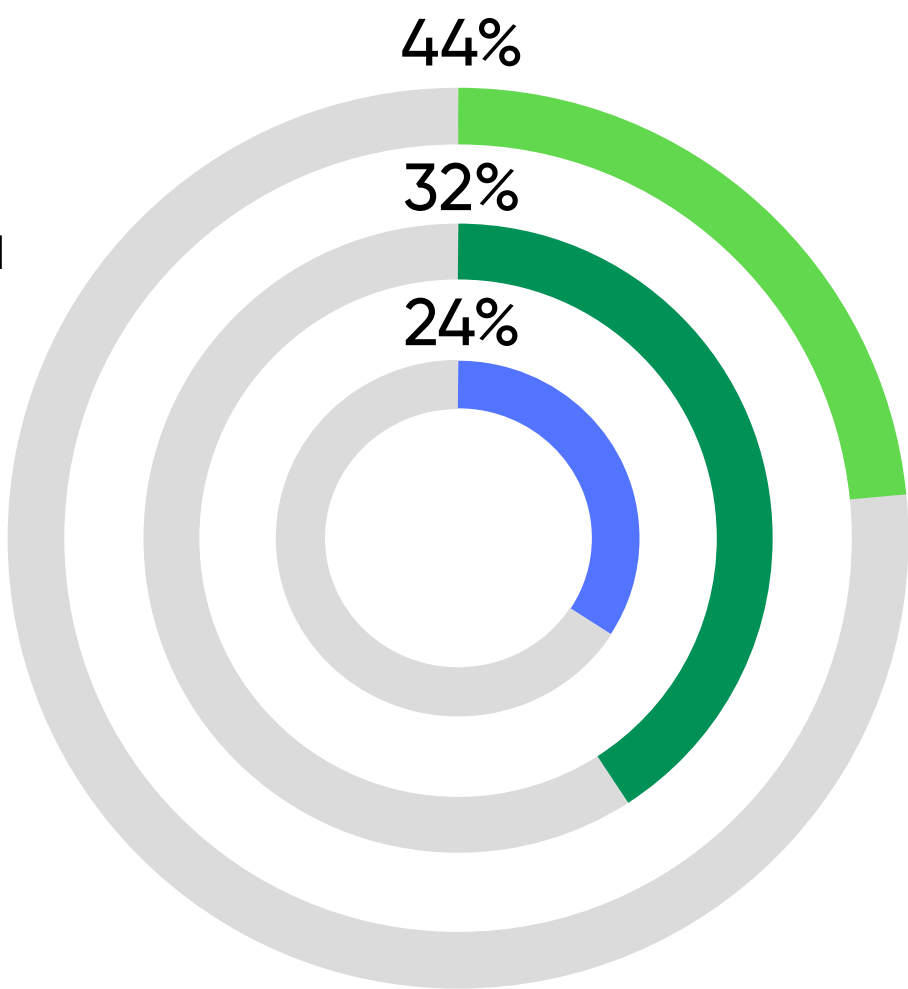


Global revenue breakdown

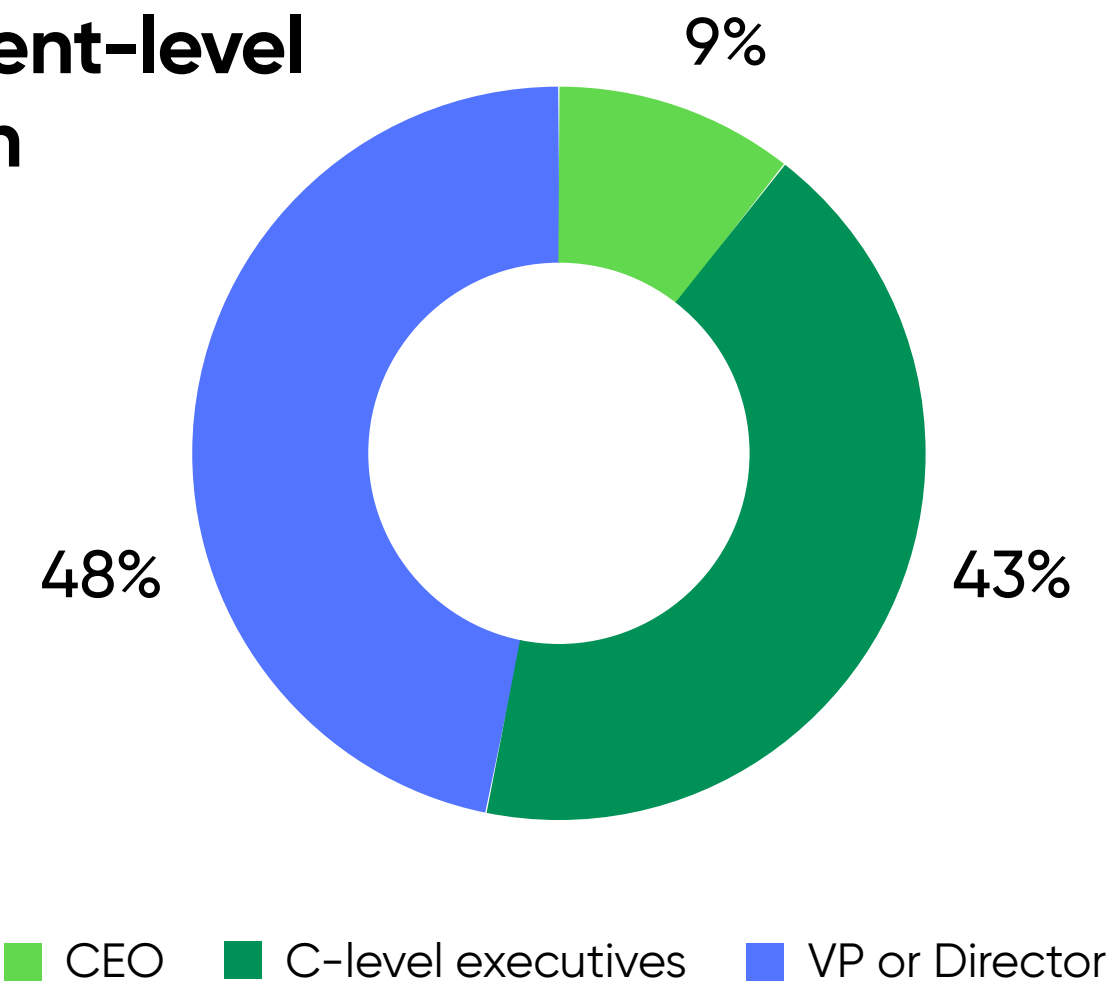
76% of respondents reported >\$1B in annual revenue

USD

- \$1B–\$5B
- \$5B+
- \$350M–\$1B

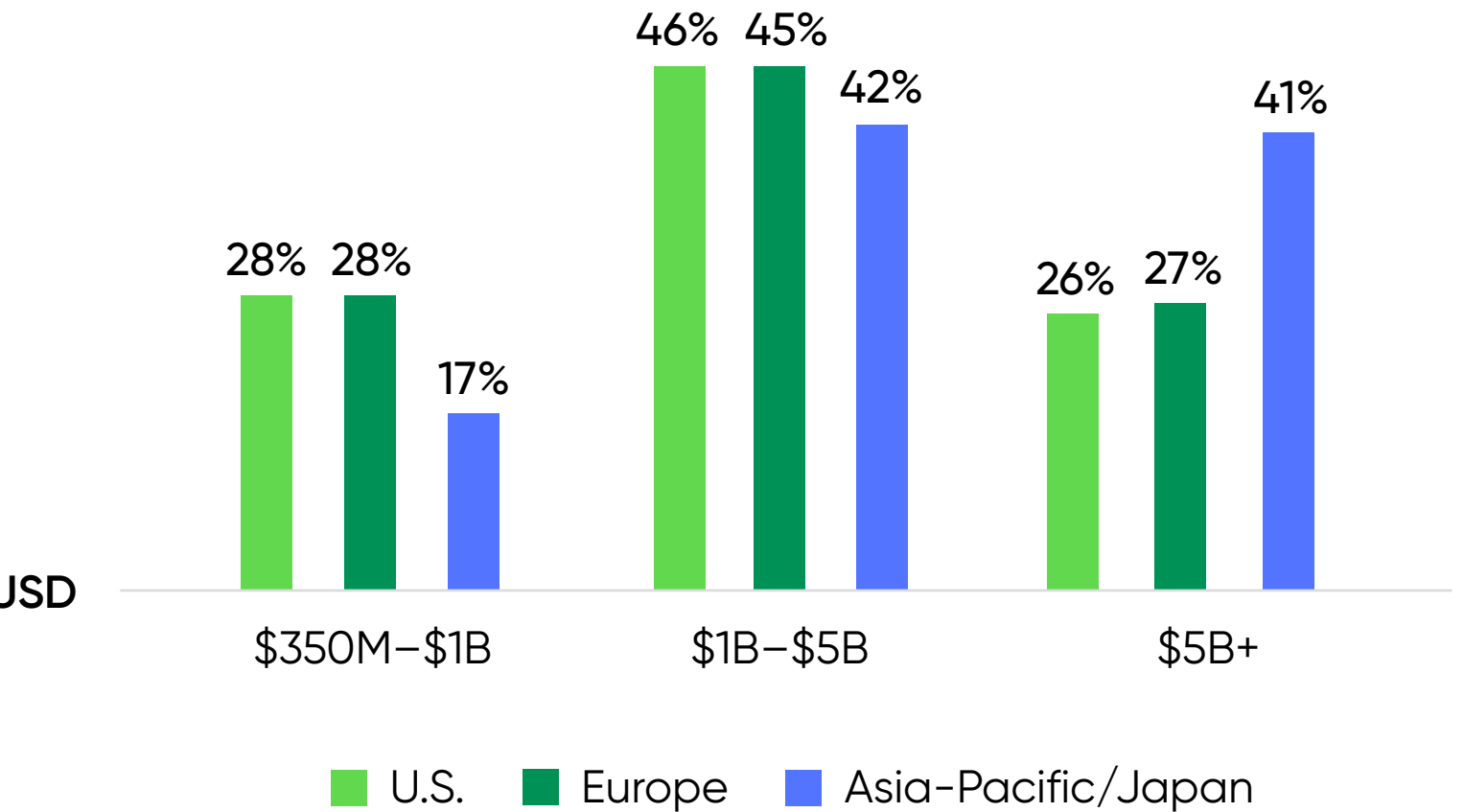


Management-level breakdown



C-level executives: COO, CFO, CIO, CTO, CISO, CHRO, CRO

Regional revenue breakdown



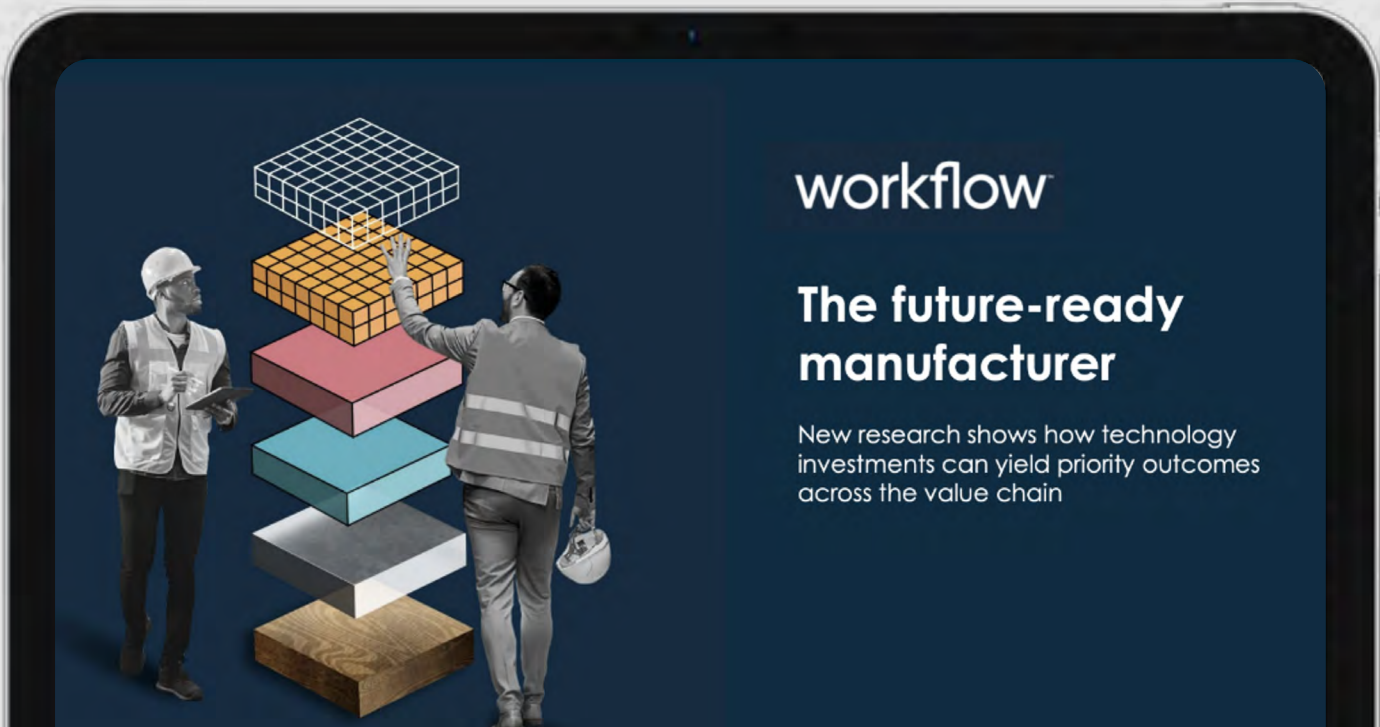


For a deeper exploration of ServiceNow solutions, we recommend the following content:

The future-ready manufacturer

Gain access to insights from over 1,900 manufacturing leaders and discover how manufacturers can harness technology investments to navigate present and future macro challenges.

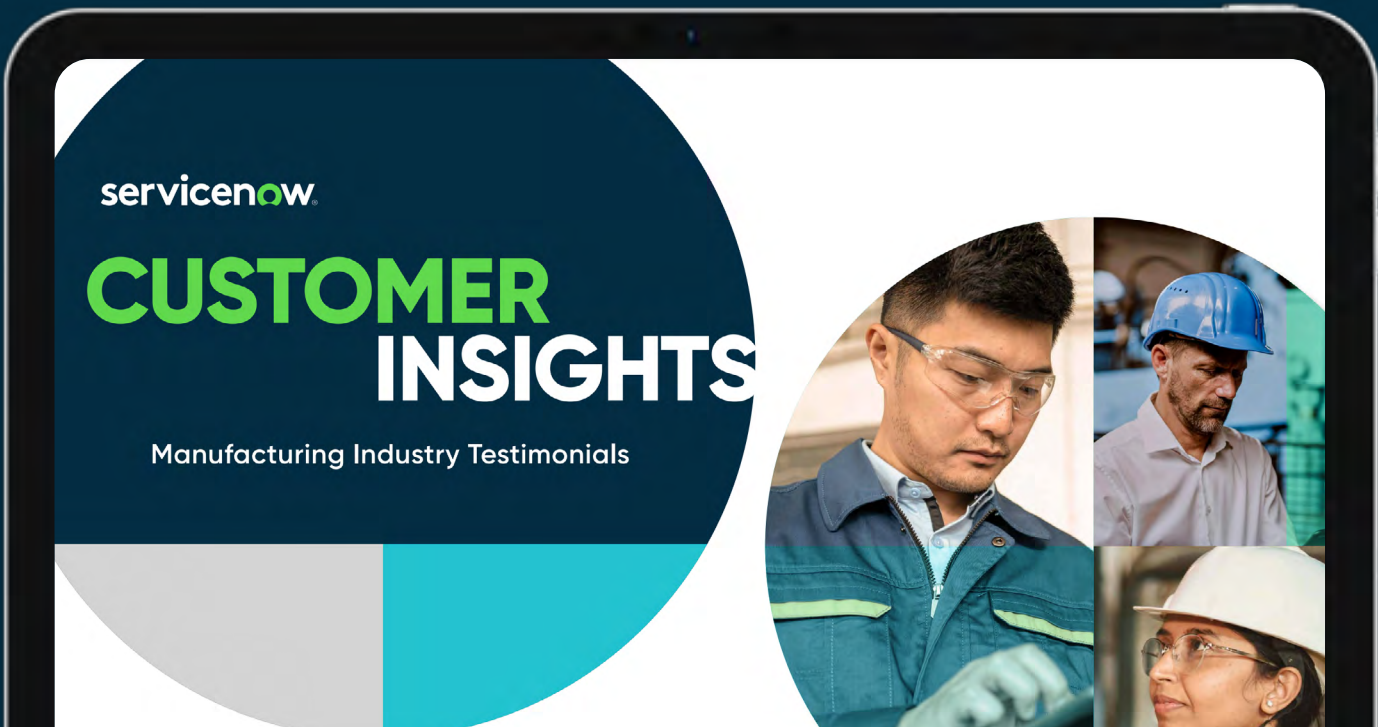
Read Ebook



Customer insights—manufacturing industry testimonials

Discover the manufacturing strategies our customers are implementing to achieve business outcomes, and drive action across the entire value chain.

Read Ebook



About ServiceNow

ServiceNow (NYSE: NOW) makes the world work better for everyone. Our cloud-based platform and solutions help digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow™. For more information, visit www.servicenow.com.

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