



Korcomptenz



The CIO Guide to Customer Service Transformation and the Modern Service Operating Model

20 questions to answer before modernizing customer service technology, activating AI, or reshaping delivery through Outsourcing 2.0, staff augmentation, and a Global Capability Center

Customer service transformation is not only a CRM or contact center project. CIOs must align channels, cases, knowledge, customer data, ERP, field service, portals, AI, security, support, talent, and governance. This guide helps technology leaders evaluate both the future service platform and the operating model required to run it.



Five signs the service environment is holding the business back



1 Customer, dealer, warranty, and service interactions are fragmented across systems and channels



2 Agents search multiple tools for customer, product, asset, order, or service context



3 Case routing, acknowledgments, escalation, approvals, or follow-ups rely on manual work



4 IT owns a growing support and enhancement backlog



5 AI is a priority, but service data, knowledge, security, and workflows are not ready

Platform modernization checklist

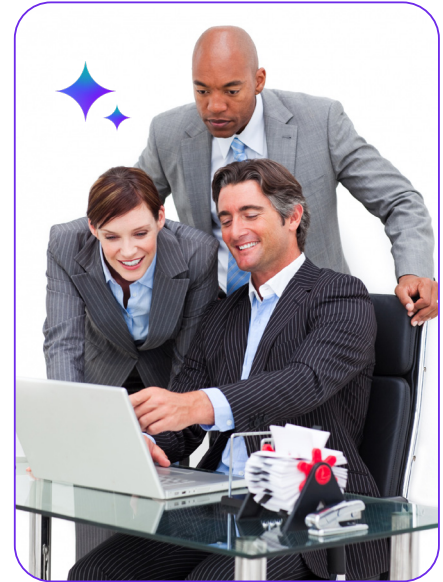
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|---|---|
| ☐ Are voice, chat, email, voicemail, chatbot, portals, and case management connected? | ☐ Is knowledge current, governed, searchable, and suitable for key AI use cases now and in the future? |
| ☐ Is service integrated with ERP, sales, field service, assets, orders, warranties, and dealers? | ☐ Do operational dashboards support routing, backlog, SLA, channel, topic, and quality decisions? |
| ☐ Are service workflows standardized and automated? | ☐ Can the platform support self-service, agent assistance, and continuous improvement? |

Choose the right operating model

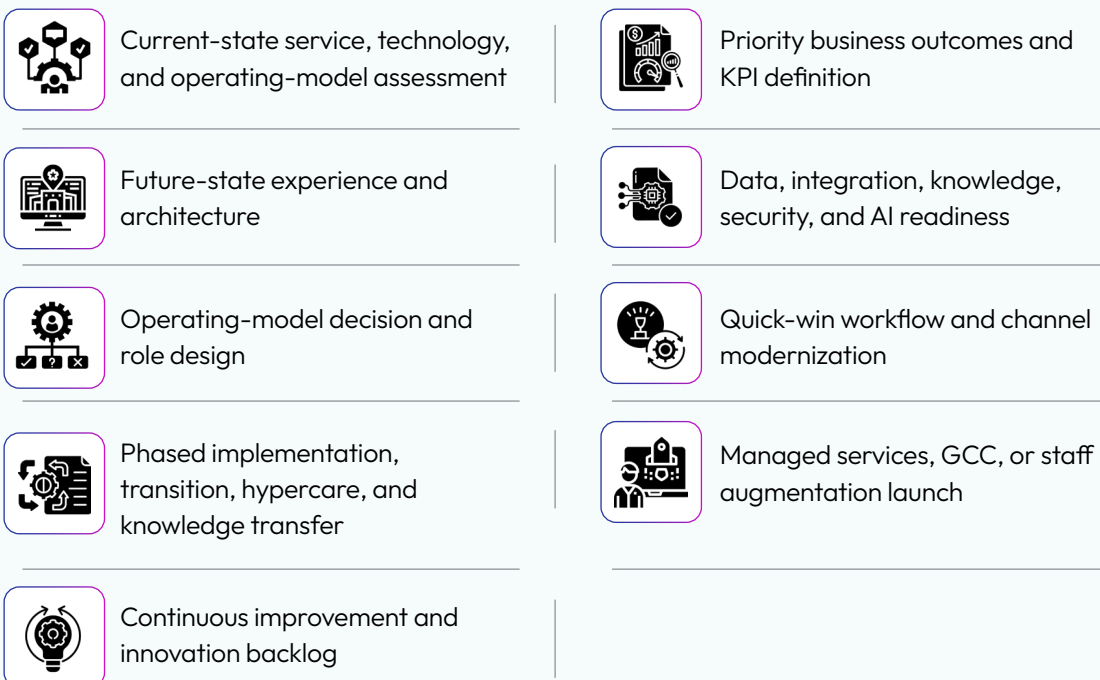
Model	Best Fit	Control and Responsibility
Internal team	Stable demand and strong internal skills	Client retains full staffing, management, knowledge, and delivery responsibility.
Staff augmentation	Specific skill or capacity gaps	External specialists integrate into client tools, processes, and leadership structure.
Managed services / Outsourcing 2.0	Ongoing support, enhancement, SLA, automation, and improvement needs	Provider assumes defined operational responsibility with governance and outcomes.
GCC / dedicated capability center	Long-term capability, scale, continuity, and enterprise alignment	Dedicated team operates as an extension of headquarters under a defined governance model.
Blended model	Transformation plus long-term run and innovation	Internal ownership combines with augmented talent, managed operations, and a dedicated global team.

Platform modernization checklist

- ▶ Which capabilities are strategic and should remain under direct internal ownership?
- ▶ Which work is persistent, repeatable, measurable, and suitable for managed delivery?
- ▶ Which specialist skills are needed temporarily or variably?
- ▶ Which processes need dedicated knowledge retention and trained backups?
- ▶ What SLAs, KPIs, governance forums, and escalation paths are required?
- ▶ How should savings be reinvested in automation, AI, analytics, and service innovation?



Transformation roadmap



CRM AI You Can Use Right Now

AI is already transforming customer service in measurable ways. If your organization isn't taking advantage of these opportunities, there's a chance you are falling behind.

- Case and conversation summaries

- Email and chat response drafting

- Knowledge retrieval and recommendations

- Natural-language access to service records

- Routing and prioritization support

- Service trend, backlog, topic, and channel insights

- Next-step and workflow assistance

- Automated end-to-end case management



Schedule a Customer Service Transformation and Operating Model Assessment with Korcomptenz.



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Thank you for reading

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