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Advertising and CX

Top 7 Ways to Deliver Service That Meets the Moment

Customer service is all about responding to a need in the moment— whether it's tied to a routine issue for a single customer or a massive disruption that's impacting your company.

The question is, are you prepared for both?

While most people think of customer service as answering questions and fixing problems, they don't think about the effects of global challenges on business like a healthcare crisis, manufacturing delays, or a skilled worker shortage. But those very types of issues can test your ability to succeed. Here are the top seven ways to keep your customers happy and your business running smoothly.

1. Digital customer service

What is it?

Digital customer service provides support through digital channels such chat, email, SMS text or social media. These experiences generally fit into two classes.

In assisted service, human agents deliver customer service using digital channels like chat or online video conferencing. While the modes of communication used are different, these experiences are very similar to their traditional counterparts.

Digital self-service makes it possible for customers to serve themselves without a live agent's assistance—but there's much more to it than an online help center. Advanced features such as process automation, natural language processing (NLP), and artificial intelligence (AI) can be used to

- Troubleshoot problems
- Explain contract and warranty terms
- Automatically reset login credentials
- Demonstrate proper assembly and usage
- Connect customers with expert advice—and more

Why it's important

Digital customer service satisfies the preferences of today's customers for choice, control, and speed. They can use digital channels to research, shop, and get support, which means they can get help at any time of the day. And digital service empowers them to solve problems on their own schedule and avoid having to interact with an agent.

Key strategies for getting started with digital customer service

1. **Your customers**

   Digital customer service is not a one-size-fits-all solution, so it's essential to carefully consider customer profiles as you build them. For example, while digital assistants are popular among Gen Z customers, less tech-savvy generations may not be so eager to adopt them. Or, customers in heavily regulated industries like finance may prefer not to provide sensitive information through a chat window or web form. To encourage more customers to use digital channels, provide options that reflect their needs and preferences.

2. **The human-to-robot balance**

   Most businesses will benefit from a combination of human-assisted service and AI-powered self-service. To make the best use of your resources, establish a threshold to govern when customers can escalate requests from a bot to a human agent. Many businesses prefer self-service for handling simple, recurring requests such as checking the status of an order or canceling a subscription. More nuanced tasks, like determining eligibility for an upgrade or replacing a complex piece of machinery, likely require a human hand. Find the right blend that satisfies customers and supports agents.

To learn more, read
**Essential Strategies
for Digital Customer Service**

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56% of service leaders are adding new channels or features within their existing channels, but customers still call for live support

3. **Channel mix and complexity**

Modern customers like having options when they need to contact customer service. However, there is such a thing as too many channels. A Gartner survey found that companies offering more service channels saw an increased volume of requests in their service centers. The same survey found that 61% of customers will use both assisted and self-service channels to resolve a single service request—a practice known as channel switching, which can complicate resolution journeys and duplicate costs by engaging human agents and AI.[1] To mitigate this, select digital service channels carefully and define distinct use cases for each.

4. **Channel and data silos**

Every channel generates transactional, customer, and/or behavioral data. But, if that data is siloed and disconnected, its value is limited. Agents and customers will struggle to connect the dots, manually piecing together interactions and records from different systems—and likely noticing gaps in the process. It is inefficient and frustrating for both parties when customers have to provide the same information repeatedly. To prevent lapses in customer understanding, a digital service strategy should integrate channels so accompanying data is connected and complete.

5. **Existing channel performance**

Think of digital service channels as something to augment—rather than replace—existing channels. 56% of service leaders are adding new channels or features within their existing channels, but customers still call for live support.[2] To give customers choice, optimize and augment the channels you have as you build out their digital counterparts.

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2. Effective contact center management

What is it?

How do businesses manage their daily contact center operations, including technical support, customer service, and sales assistance? And what are their strategies for helping customers across multiple channels such as voice, email, chat, video, and social media? That's what contact center management is all about.

Why it's important

Without effective call center management, your company is more likely to experience:

- Frustrated customers who have difficulty getting help, need to repeat their information to different agents, and receive incorrect information

- High agent turnover due to outdated and disconnected systems, unrealistic satisfaction scores, and inconsistent institutional knowledge

- Elevated costs due to new hiring and training

- Disparate data and systems that provide different customer views and hinder internal collaboration

Key strategies to improve your contact center

1. **Customer preferences**

   Do your customers prefer to engage digitally or on the phone? Are they comfortable with text messaging or video? Can they easily access these different channels and devices? Questions like these will help you better understand your customers and think about what changes you may need to make. If you sell to businesses that must comply with data privacy regulations, your contact center will also need to be built around these requirements.

2. **Business goals (short-term and long-term)**

   Every service organization has different goals. For some, they've been asked to turn customer service into a revenue generator by selling additional products. Others need to improve operational efficiency so that fewer agents are needed. Or maybe there's a focus on automating more aspects of customer service to reduce staffing costs and fund innovation. As you set out to develop your plan, consider your initiatives and whether they are likely to stay the same or change over time.

3. **Company's growth strategy**

   If you plan to expand globally, your contact center employees and systems might need changes. For example, you may need to hire agents who speak specific languages or change processes to comply with regional data capture and privacy laws. If you're launching new products and services, your agents will need training on them. And if mergers or acquisitions are on the horizon, it's essential to think through the technological, operational, and human resources challenges of combining contact center operations.

To learn more, read
Essential Strategies for Contact Center Management

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4. **Hiring and talent management**

   Your agents are the public face of your company, but good help is hard to find—and expensive. Every time you lose an agent, it costs your contact center $35,000 to $105,000.[3] What is your company's hiring and talent management philosophy? Is a remote workforce effective, or do you need a physical location for contact center employees? Whether your employees are remote, onsite, or a combination of the two, consider how you can improve onboarding, training, and management of your employees.

5. **Innovation**

   There are many opportunities to optimize contact center operations through automation—from simple service requests to complex workflows. Consider how you might use innovation to improve your customer and agent experience. Will those innovations work with your IT roadmap and is there support for investment and experimentation with emerging technologies? Your agents will need to be prepared to adopt these kinds of changes and receive any necessary training.

3. Great agent experience

What is it?

There's a saying in customer service: "Happy agents create happy customers." But getting there depends on the agent experience.

How empowered, satisfied, efficient, and productive are your agents? Do they have the tools they need to help customers quickly or do they face challenges every step of the way? These are the details that encompass the agent experience.

Why it's important

When you equip agents with the right training, tools, and support resources, they can provide exceptional service that delights customers. And as a bonus, great agent experience leads to higher retention rates—a perfect antidote to the high cost of agent turnover.

Satisfied agents can deliver the service experiences your customers expect.

- **Faster, more accurate service:** When agents have the right knowledge and tools readily available, customers receive faster, more accurate service.

- **Reduced friction:** Agents with a complete view of the customer can reduce friction along the service journey to deliver better customer experiences, which ties directly to revenue.

- **Personalized service:** Armed with the right data, agents can personalize interactions with customers when it counts.

Happy agents create happy customers

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Key strategies for creating a positive agent experience

1. **Productivity**

   Unproductive agents aren't able to serve customers to the best of their ability. If an agent has to navigate multiple systems and screens to find the right information, and the customer has been on hold a long time, you'll end up with a poor experience all around. With unified agent desktops that integrate all communication channels and external applications into a single interface— along with embedded knowledge base and team collaboration tools—agents can significantly speed their resolution time and help more customers.

2. **Job satisfaction**

   In a world devoted to customer service, maintaining a satisfied workforce can be challenging. Some of the factors that affect agent job satisfaction include:

   a. Low salaries

   b. Repetitive tasks

   c. Inflexible work schedules

   d. Lack of career development

   e. Dealing with frustrated customers

   While contact center management can't mitigate all of these factors, the incentive for improving agent experience should be a priority since the average agent turnover rate can reach a staggering 45%.[4] If management can address as many issues as possible, they'll increase the likelihood of agents pleasing customers and, in turn, produce higher customer satisfaction ratings.

3. **Tools**

   gents need the right tools to do their jobs effectively. With tools like agent scripting, AI-recommended actions, and decision automation, agents can resolve service requests with minimal training. Through automation and dynamic guidance, agents can follow step-by-step processes to deliver faster, more accurate service without having to dig around for the right answer. Some tools of the trade include:

   - **Agent desktop:** A single interface for customer service applications and associated data from email, websites, physical stores, mobile sales, and account information customers provide when they contact support

   - **Agent analytics:** Role-based dashboards and reports that help management better understand agent productivity and effectiveness

   - **Knowledge base:** A repository of information to answer questions accurately and consistently.

   - **Automated workflows:** Technology that automates manual processes in day-to-day interactions

   - **Feedback management:** A process where agents solicit customer feedback for continuous improvement
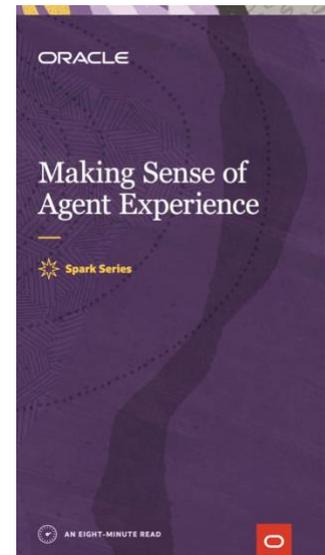
To learn more, read
Making Sense of Agent Experience

4. **Training**

    Instead of one-and-done training, agents should have continuous opportunities to improve their overall service delivery, including both technical and soft-skill training.

    -   **Technical skills:** Learning the tools needed to provide service, including phone systems, the agent desktop, and product-specific training

    -   **Soft skills:** Learning the people skills to interact with customers, supervisors, and other employees successfully, such as communication and problem-solving

5. **Organization**

    Organize your agents based on the different roles they play within your business. For some, it makes sense to align agents into tiers according to their experience and product expertise. In other cases, it might make sense to organize by product line, geography, or skill set (like foreign language). Once this framework is set, modern contact center software can be used to route incoming requests to the best suited agent to improve efficiency and quality of interactions.

4. Proactive service

What is it?

Remember the last time a waiter refilled your coffee without you having to wave him down? Or the text reminder you got for your oil change? These are examples of proactive service—anticipating customers' needs before they ask for help. It's the kind of service we've all come to expect.

There are three types of proactive service experiences.

1. **Human (person-to-person)**

    A service professional notices a future need and recommends it to a customer. For example, while activating high-speed internet, a technician suggests buying a new router that can achieve the connection speeds the customer has paid for.

2. **Technical (machine-to-person)**

    A technology provider preemptively addresses a technical issue. For instance, a B2B SaaS company releases a software update to fix a bug that users haven't yet noticed. Or, a smart commercial refrigerator registers a needed repair and communicates the data needed to make that repair via the Internet of Things (IoT).

3. **Customer-driven (person-to-business)**

    Customer support data preempts large-scale issues and needs. Let's say a manufacturer receives multiple complaints about an office coffeemaker malfunction. Instead of waiting for every customer who has purchased that machine to submit a ticket, support data triggers an alert to send replacement coffeemakers to everyone who ordered one.

Exceptional proactive service creates more loyal customers

Why it's important

Most people think of customer service as a business function for fixing problems, like when you receive a defective product and contact customer support for an exchange. This traditional model is known as reactive service. But if that's the only type of service being offered, it can cause a host of problems.

- Resolving problems takes longer if you're waiting for customers to alert you to issues, increasing cost and effort for your team

- When resources are tied up fielding a high volume of calls, there's nothing left to power innovation—and your company may lose its competitive edge.

- Inefficient service leaves customers with products or services they can't use, leading to dissatisfaction, customer attrition, and reduced revenue and market share.

Proactive (or preemptive) service avoids these issues by anticipating and addressing customer needs before customers become aware of them.

Key strategies for building proactive service

1. Customer expectations

How well do you know your customers? Do they jump from online to offline across multiple channels when they are looking for help? Do you have a clear under-standing of which customers are candidates for proactive service? The truth is, all customers are different and while some people might appreciate proactive outreach to provide updates on minor issues, others may prefer to be contacted only on a need-to-know basis. Consider which situations truly merit proactive outreach to avoid annoying customers or sending so many minor updates that critical issues go unnoticed.

2. Employee skills

Proactive service requires a shift in how your organization and agents approach customer service. Being proactive involves more than outbound notifications or IoT asset monitoring. By reducing routine inbound calls, your agents will need to be able to solve more complex service requests. Do you have the right team in place to handle these types of issues? Or will you need to hire and train your agents to make the move from call-takers to experts?

3. Business and financial goals

Some organizations have been asked to transform their service operations from a cost center to a profit center. Others have been told they need to improve operational efficiency to reduce staffing needs. And for some, it's both. To inform your strategy, consider all the ways proactive service can benefit your bottom line and ask yourself if the pressure to cut costs and increase revenue is likely to stay the same, increase, or decrease over time.

To learn more, read
Essential Strategies for Proactive Customer Service

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4. **Innovation**

   For some businesses, building a proactive service model may require investment in technology, especially if your customers want more automation and channel support such as text or social media. It's also important to consider what technology and process innovations will increase productivity for your agents. Do you need to connect customer account information currently stored in separate systems such as financial and supply chain? And what about IoT? These questions are critical to improving customer experience and boosting your competitive edge.

5. **Leadership champions**

   While some proactive service changes will just involve agents and line of business managers reporting on customer interaction trends, you may need data analytics to identify particular patterns or areas of friction along the customer journey that erode customer loyalty and increase churn. Depending on your current technologies, this could require a financial investment. Identify leadership "champions" to advocate for you across the organization and designate the funding you need.

5. Guided self-service

What is it?

Digital self-service has become customers' go-to approach for finding answers and resolving issues. It lets them avoid long call center wait times and puts them in control. Guided self-service adds automated assistance to make it even more effective. It can be a chatbot asking questions that steer a customer toward the best resolution or a pop-up message that provides additional information to someone completing an online form.

Examples of guided self-service:

- **At home/on the road:** Imagine you have a flat tire. You call your road service or insurance company and the system asks you to "press one" for towing service. You are then texted a link to a chatbot that asks you questions and automatically contacts the nearest towing service to dispatch assistance. You're texted the name of the towing company and an estimated arrival time. Later, you're asked if you're satisfied with the service or need more help. The chatbot gives you a phone number you can call with a single tap.

- **In the office:** Guided self-service can help employees sign up for benefits like health insurance and complete tasks such as promotions, transfers, and raises. For insurance, automated questions appear to help you determine which benefits you're eligible for based on your location, family status, and other personal details. It then provides action items and other information based on your answers.

Besides being easy to use and putting employees in control, guided self-service provides mobile capabilities, built-in approvals, and workflows—while also eliminating paperwork.

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Why it's important

Customers expect great digital support experiences. Because 40% of consumers now prefer self-service over human contact and 69% of consumers try to resolve their issue on their own,[5,6] it's critical that businesses offer guided self-service to ensure success. FAQs and contact forms are no longer enough. Automated assistance goes further to give people the guidance they need to resolve their issues, based on their particular circumstances and preferences.

Guided self-service also offers several business benefits.

- **Improved customer experience and brand loyalty:** Being able to quickly find answers and resolve issues creates happy customers—and happy customers become loyal customers.

- **Reduced costs:** With the right technology, customers can help themselves, and your company can reduce service costs because fewer service tickets and calls are needed.

- **Increased productivity:** When self-service is automated, your team can focus on more critical, complex issues instead of simple, repetitive inquiries.

Key strategies for a successful guided self-service strategy

Guided self-service can be your brand differentiator. But you can't just set it and forget it. It's a continual service evolution driven by several fundamental tools and metrics to ensure its effectiveness. A successful guided self-service strategy should include these key capabilities.

1. **Knowledge bases**

   Information about your products and services often included in frequently asked questions, white papers, video tutorials, and more.

2. **Chatbots**

   Also known as digital assistants or digital agents, chatbots use AI or natural language processing (NLP)-powered software to understand, analyze, and respond to customer queries.

3. **Customer intelligence**

   The process of gathering and analyzing customer information—such as their purchase history, behavioral data, or customer details—to provide personalized support and develop a stronger relationship.

4. **Decision automation**

   Technology that guides the customer through a series of questions and delivers personalized information and advice.

5. **Proactive engagement**

   Based on customer activity, this automated assistance may appear as chat pop-ups, suggested knowledge base content (also known as contextual knowledge), or options to speak to a live agent.

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Making Sense of Guided Self-Service

✳ Spark Series

A SEVEN-MINUTE READ
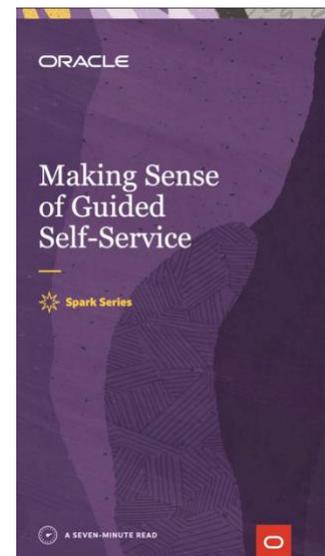
To learn more, read
Making Sense of Guided Self-Service

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6. Visual engagement

What is it?

Visual engagement is all about real-time collaboration with customers. Using channels that feature a dynamic visual element such as video calls, screen sharing, and third-party conferencing allows you to

- Help customers navigate to specific information on the website, such as technical specifications or assembly instructions

- Demonstrate a product such as software or a small device

- Assist customers as they're completing an online purchase, form, or other process

- Diagnose and resolve problems such as incorrect software installation or the damage to an item during shipping

Why it's important

The global pandemic increased the reliance on video as in-person service calls were either limited or prohibited altogether. Since that time, business and consumer customers have become more comfortable with video and continue to see it as a convenient way to get the help they need.

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Key strategies for initiating visual engagement with your customers

1. **Direct links on your website**

   Create easily visible direct links on your website so customers can start a text-based chat, voice, or video session. These options can be displayed all the time on every page, or you can limit the options to certain business hours or certain pages. You can also limit access to certain types of customers, such as those who have paid for premium support packages, loyalty rewards members, or high-value accounts.

2. **Invitation after escalation**

   If a customer still has an unresolved issue after interacting with the first channel or channels, you can escalate their case to a deeper level of engagement, such as video or screen sharing. Escalations can be raised in different ways, for example:

   - Automatically by a bot based on text the customer enters

   - At the customer's request by clicking a button or entering the inquiry in a chat window

   - By your agents, who may escalate the interaction from chat, voice, or phone to video or screen sharing
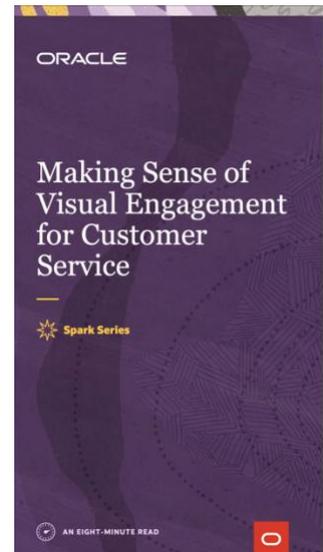
7. Chat

What is it?

Chat is a convenient way for customers and service agents to communicate online. How does it work? Similar to a text message, chat windows pop up on a company website or mobile app, inviting visitors to connect. This technology allows prospects and customers to get their questions answered and problems resolved quickly—without having to call customer support.

There are two types of chat technologies.

- **Live chat** refers to human service agents communicating with customers in real time via a chat interface

- **Chatbots** use software powered by artificial intelligence (AI) to understand, analyze, and respond to customer queries sent through chat

Why it's important

Even though chat has been around since the mid-'90s, adoption has grown significantly in recent years thanks to advanced technologies like AI. Natural language processing (NLP), a branch of artificial intelligence, helps computers understand, interpret, and manipulate human language to create more relevant, personalized chat conversations.

Getting chat right is important to your customers, your agents, and your business.

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Making Sense of Visual Engagement for Customer Service

Spark Series

AN EIGHT-MINUTE READ

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Making Sense of Visual Engagement for Customer Service

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Customers appreciate

- Not waiting on hold or navigating an endless automatic phone menu

- Being able to multitask while chatting with an agent

- Getting answers and issues resolved faster by chat than phone or email

From a business perspective, chat can

- Help service agents work more efficiently and productively

- Reduce support costs when chatbots are used versus live agents

- Improve the quality of service and build customer loyalty

- Provide 24/7 support from live agents or chatbots

Key strategies to improve your chat experience

1. **Balance agent productivity and customer satisfaction**

   Both are important, and neither should be prioritized over the other. Use chat to provide the immediate assistance customers demand while keeping agents productive and efficient.

2. **Be ready for mobile**

   Is your chat portal optimized? Is it responsive? Does it load quickly? These are important factors to consider if you want to keep customers happy and earn their loyalty.

3. **Ensure AI and humans work together**

   Chatbot technology is growing increasingly sophisticated. Yet many customers still prefer chatting with a human. Transition customers seamlessly from chatbot to live agent by sharing customer information effectively.

4. **Measure and monitor the success of live chat versus other methods of engagement by continually referring to your KPIs.**

   What is your average handle time? Or call deflection rate? Ask your customers about their experience with your chat capabilities.

5. **Look into the tools and technologies, such as integrating your knowledge base or decision automation tool, that will help improve and personalize your chat experience.**

   If live chats are first routed through a digital assistant, you'll increase the success of self-service with embedded knowledge and dynamic interviews.

6. **Enable live chat on more than just your customer service page.**

   It's a great place to start, but it may not be the only place where a customer encounters an issue or where they want to initiate a chat. Offering live chat across multiple points on your website, like the cart or check-out page, may increase conversion rates, average order value, and customer satisfaction.

To learn more, read
Making Sense of Chat

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