Synthetix Special Edition

Multi-Channel Online Customer Service

FOR DUMMIES

A Wiley Brand

Learn to:

- **Deliver great customer service via all online channels**
- **Supercharge your customer service and satisfaction**
- **Answer questions and resolve issues instantly**
- **Create an efficient, effective customer service operation**

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synthetix

Steve Kaelble

synthetix

Multi-channel Online Customer Service Specialists

At Synthetix we believe that consistent and integrated customer service is key to customer satisfaction.

We've worked with some of the world's best known brands, transforming their online customer service using FAQ web self-service, live chat, virtual agents, email management, intelligent web forms and social media, combined with integrated natural language search for websites, contact centres, mobile and social networks.

World Wide Web Email/Contact Form

Mobile Web/Apps

Live Chat

Social Networks Contact Centre

All Synthetix services are cloud first and software as a service, delivering customer service solutions to all customer touchpoints. By extending knowledge across multiple channels, fast access to accurate and consistent answers ensure contact centre agents, customers and employees alike can find the right answer the first time and every time.

We know that choosing a partner to develop your online customer service is a decision of real strategic importance. We continuously work with our clients to understand their business and optimise their online customer service delivery.

Our portfolio of clients include:
Virgin Holidays, ACAS, esure, UK Visa and Immigration, Boots, National Express, Kärcher, Avios, Fortnum & Mason, Carphone Warehouse Ireland and The Yorkshire Building Society Group.

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Introduction

*Y*ou may have the best product on the market, but if your customer service falters, your goodwill may dry up quite quickly. Customer experience (CX) is a large part of what customers remember. It's also a large part of what they talk about when they're practising that magical act that marketers know as "word of mouth." Customer service reflects on your business, either positively or negatively. And if it's great customer service, you can use it as a fantastic marketing plus.

That's what *Multi-Channel Online Customer Service For Dummies, Synthetix Edition* is all about. This book focuses on the many different ways that today's most forward-thinking companies deliver customer service. It's about building a multi-channel customer service strategy that makes contact with customers not just by telephone but also through the company website, through social media, through online chat, and through FAQs. Customers often use more than one channel in dealing with companies, and more often than not, the telephone is not their preferred option.

This book details many different channels available to your company or organisation, and explores the strengths and drawbacks of each. You'll find it packed with tips for making the various channels work more effectively – and just as importantly, work together seamlessly.

Now and then you may see references to *omni-channel* customer service. "Omni" means "all", and aligning all channels is certainly the ultimate goal. A key ingredient for creating that big win is knowledge, the glue that can help you transform multi-channel into omni-channel. Your operation will be more consistent, accurate, and efficient if you have the same knowledge-base feeding multiple customer contact channels. When choosing a vendor, ask each candidate to demonstrate how these multiple contact channels integrate with each other, to give you the best chance to achieve that omni-channel dream.

Foolish Assumptions

It's probably not going out too far on a limb to make a few assumptions about you, the reader, given the fact that you've picked up this book. We're assuming the following:

✔ You are an executive at a company or organisation for which customer service is a high priority.

✔ You recognise that customer service is a whole lot more than just answering phone calls.

✔ You'd like to learn the basics about orchestrating a customer service strategy where all channels work in harmony to please the customer.

How This Book Is Organised

We've divided the subject matter up into chapters focused on the various channels that are a part of today's customer service, and the ways you can go about establishing a multi-channel strategy for your organisation. Here's a glimpse:

Chapter 1: What Is Multi-Channel Customer Service? It's not just service by telephone, it's a whole lot more.

Chapter 2: Helping Yourself: Most customers want to first try to find their answers themselves, and smart companies do their best to make that easy for their customers.

Chapter 3: Striking Up a Chat: Live interaction with a human remains important, but in-person and on-the-phone aren't the only possibilities. More and more customers are comfortable with chatting online.

Chapter 4: Connecting Via Email: Communication through email was the first new channel to gain acceptance, but it's not always the best. Here are ways to make it work most effectively.

Chapter 5: Finding More Channels: Your customers want to reach you through their mobile devices and on social media, and a lot would be glad to help you crowdsource customer service answers.

Chapter 6: Being a Repository of Knowledge: The knowledge-base is the brain of your multi-channel customer service operation. This chapter includes thoughts on building that knowledge-base, keeping it up to date, and plugging it into all the channels.

Chapter 7: Making It Happen: So you're ready to better align your customer service channels. Where do you start?

Chapter 8: Ten Tips for Agents and Administrators: A series of quick keys for succeeding in the multi-channel world.

Icons Used in This Book

Throughout this book, in the margins, you'll notice some lovely icons. They're more than just pretty, they have purpose, too. Here's what they signify:

Though we've chosen all of the thousands of words in this book carefully, please pay special attention to the paragraphs next to this icon, because they spell out the most vital concepts.

Here's some helpful advice to consider as you establish a multi-channel customer service operation of your own.

Not to alarm you or anything like that, but there are ways you can stumble as you work toward delivering exceptional customer experiences. This icon points to discussion about one of those danger areas.

Where to Go from Here

By all means, turn the page! Or flip through the pages. This book is intended to serve your needs in whatever way makes sense to you. Read it cover-to-cover, pick a chapter now and go back to another later, read just the paragraphs with icons. You can even read it back-to-front, if that makes you happy. Whatever you do, please read on, because your customers are waiting to contact you!

Chapter 1

What Is Multi-Channel Online Customer Service?

In This Chapter

▶ Connecting via telephone

▶ Building more channels

▶ Understanding the motivations

*C*hange is a way of life these days; it's so rapid that it's practically dizzying. You've probably heard the adage "change is the only constant in life" more times than you can count (though change feels nearly overwhelming now, it's a bit surprising to realise that quote was actually first uttered centuries ago, by the Greek philosopher Heraclitus). Products and services are changing – and so are the ways you provide customer service.

This chapter takes a look back at what customer service used to be like, and how that has changed. Many channels now provide services to customers, and some of the newest varieties are incredibly powerful.

Picking Up the Phone

Contact centres used to be known as call centres, because they started out handling phone calls. They've been doing that for decades – the first call centres in the UK emerged in the 1960s, with rows and rows of agents taking and placing telephone calls. Of course, today's contact centres still do this, but that's just the beginning.

Yes, plenty of customers still like to pick up the phone and place a call to customer service. Speaking to a human is a time-honoured tradition when resolving an issue or asking a question, and even when making a purchase. Older customers, in particular, think of this customer service channel first, and there are some situations that simply cannot be resolved in any other way, without live, back-and-forth conversation.

REMEMBER

Anyone who has operated a call centre knows that it's not exactly inexpensive. Each and every time a customer picks up and dials that phone, it costs more money in labour and overhead than one might think. Every time a call can be avoided or diverted, it saves money, and that's why call centres have evolved into contact centres. Many ways to make contact won't require you to utter a word!

Channels, Channels, Everywhere!

If you've ever provided a mobile phone to a teenager, you already know that today's young people seem loathe to actually open their mouths and talk. Some seem to have even forgotten that their smartphones can actually place and receive telephone calls. That's so quaint and old-fashioned to them, because they long ago moved on to other forms of communication.

Those other forms of communication are taking over life at today's contact centres, which now field customer contacts through an increasingly wide range of channels. The telephone is still an option, but customer contacts also might arrive by way of email, form-driven online contact, online chat, text, social media, and the list seems to keep on growing.

REMEMBER

Web-based self-service is now considered to be the primary channel for customer service. Nine out of ten people use a brand's website as a source of information, and 89 per cent of customers say they are more satisfied if they're able to get answers quickly online. A lot of these customers are quite happy to contact a company via email if an answer can't be found on the website, or fill out a form requesting more info.

More than half of all customers also expect companies to provide customer service through social media channels such

as Facebook. Three-quarters of customers want to use their smartphone for customer service – and when it comes to their smartphones, they want to use the "smart" part more than the "phone" part. A quarter of them say if they can't self-serve their issue successfully, they'd like to strike up an online chat.

Most customer service choices are less expensive to operate than a traditional call centre. The challenge is making all of these multiple channels work in harmony with one another. That's what customers want and expect, and the companies that can achieve a truly integrated multi-channel customer service operation will reap the rewards.

Avoiding Misunderstandings

Many people assume a phone call is the gold standard for customer service, and that online channels are inferior. That's one of numerous myths about multi-channel customer service.

Customers want the best service . . . and they deserve it. They're not likely to consciously choose inferiority. The fact that they've warmly embraced customer service channels other than voice suggests that they actually like connecting that way. They're not making that choice just to save you money.

The fact is, customers expect to receive a consistent level of service, and equivalent quality, across all channels. And they're making good use of all of the channels. Ovum research finds that more than half of customers utilise three or four different channels over the course of shopping, buying, and following up.

Another myth is that these additional channels developed so that contact centre operators could slash jobs. That's really not the point. Yes, other channels are less labour-intensive, but more importantly, they serve customers well (Synthetix research finds that two thirds of customers would rather use online channels instead of voice to take care of after-sales support and service).

That said, non-voice channels do save money, and the better they work, the more money they save. According to ContactBabel research, 58 per cent of the calls that make it to

the contact centre are the result of failure in some other chan-
nel, or the customer's inability to resolve an issue through
self-service (which certainly happens from time to time, no
matter how good the self-service channels are).

Some people think an agent on the phone is best equipped
to make a sale happen. That's not necessarily true, either.
All customer service channels can help convert potential
customers into buyers. Live chat is a great way to help a
buyer make that final purchase decision. And even self-service
can be used for upselling, through carefully placed banner
advertising.

The bottom line is, non-voice channels weren't created to
avoid customers. They exist to please customers. It's impor-
tant to use them well, but research suggests more than half of
customers have trouble finding the information they're seek-
ing online. There's room to improve.

Chapter 2

Helping Yourself

*A*re people these days more self-sufficient? More anti-social? Or simply more empowered? Whatever the answer, it's true that we are more likely than ever before to go out and find our own answers, without anyone else's help. The Internet has put a whole world full of information at our fingertips, and we're very much accustomed to seeking answers.

This chapter explores how smart companies and organisations take advantage of today's do-it-yourself information seekers, establishing effective self-service customer service online, in ways that both please customers and save money. Read on to learn how to get the most out of the FAQ concept using cutting-edge technology that simultaneously meets the needs of customers and generates insights for you.

Helping Yourself via the Web

Customer behaviour has changed a remarkable amount in the Internet era. It has become second nature to seek out online information right away, at the precise moment the need arises. No one wants to wonder anymore – someone with a problem or question will sit down at the computer or speak a search into a smartphone, seeking an instant answer.

The instant-answer dynamic has major implications for virtually every business. Customers want answers to their questions and resolution of their problems, and they want it all to happen right now! In many cases, they're more than happy to find the answers themselves – the business just needs to be sure self-service information is out there to be found.

It wasn't that long ago that self-service was seen as an almost cynical cost-saving opportunity: put information online and you just might save the expense of having a human provide that information over the phone. It's certainly true that your organisation's website is the lowest-cost channel, but in a wonderful bit of Internet serendipity, the website also happens to be a customer-preferred place to go first.

According to a report from Synthetix:

- 90 per cent of customers check your website first for information, before they call or email.

- 89 per cent of customers say they are more satisfied when they're able to get answers quickly online.

- 67 per cent of them say they overwhelmingly prefer online channels over voice contact when they're seeking after-sales service or support.

- Seven out of ten customers believe online customer service will be much more prominent than traditional call centres within a decade.

- And just one of every ten people reports being completely satisfied with customer service right now, which means there's a lot of room for improvement, and great rewards for those companies that successfully improve.

These opinions hold steady across multiple industries. Consider the travel industry as an example. Customers have become quite comfortable booking their own flights and hotel rooms online, but Synthetix research indicates about two-thirds of travellers still encounter a need to contact their travel or leisure operator before the trip begins. They have a question they did not consider before booking, or something changes, creating the need to reach out. Nine out of ten say they'll check the website first.

The best-case scenario all round is for the matter to be resolved right there in the self-service channel. Most importantly, customers are happy when that happens. They want matters resolved quickly, and they want them resolved correctly the first time. If that first time is a self-service online channel, and it gets the job done, you have created a happy customer.

But nearly as importantly, successful self-service resolution saves the company money. A robust self-service online channel has been shown to reduce contact centre calls and emails by about 25 per cent. Every one of those calls would have cost money, and that adds up to a lot of savings.

Every extra step a customer must take is one more opportunity for abandonment. If you're able to reduce the instances when a customer must take the next step and make contact with the contact centre, you'll likely decrease your abandonment rate. And nobody likes to be abandoned.

What a great deal! Customers actually prefer to start out with what is the lowest-cost and often most instantly effective channel. But they expect companies to take their online needs seriously, and many aren't there yet, in the opinion of customers.

Answering Customers' Questions

An essential part of the online self-service channel is the collection of frequently asked questions (FAQs). Customers are in search of answers, so a database of FAQs is a logical place to store them. It's important to note, though, that today's most effective FAQs are a whole different breed of animal, compared with the static list of Q&As that one used to find on websites.

To begin with, yesterday's FAQs were there to be browsed. Good FAQs were organised by category to make it easier to find the appropriate question and corresponding answer, but the process inevitably involved a lot of clicking and scrolling.

Today's FAQs, on the other hand, begin with the customer asking his or her own question, typed into a search box, in simple and conversational English. For those customers

seeking answers via their smartphones, a touch-friendly interface is vital to success these days. Customers want you to make things easy for them, and if you do, you'll reap the rewards.

Smart practitioners of self-service are finding additional ways to direct customers to FAQ answers, and steer them away from making unnecessary contact with an agent. For example, FAQ search technology can be built right into contact forms.

Imagine that a customer has a question, and believes that the best way to get the answer is to just email customer service through an online contact form. The customer types in the question into the comment box, and a pop-up immediately analyses the question and suggests a couple of FAQs that stand a good chance of answering the customer's question right there on the spot. If the customer's question can, indeed, be answered by one of the suggested FAQs, it's an unexpected and welcome customer pleaser.

That certainly was the case for one public transportation company that built a new and improved FAQ operation with today's most powerful technology. The former iteration was a relatively static offering. Customers could type in a question, but received only one potential answer in return. And they only accessed the FAQs through the question section of the website – there was no interactivity with other customer service channels.

That company's solution is a more dynamic self-service operation that recognises natural language queries and returns the most appropriate responses from which the user can choose. And the solution ties directly into contact forms, suggesting solutions to pre-emptively answer customer questions before they're even finished asking them. Since making the switch, more than a million customers have tapped into the FAQs, very often finding the answer right then and there, diverting what would otherwise have been a contact centre interaction.

Something very important to note about today's most powerful self-service implementations is that they don't just serve the customer. They generate incredibly valuable information that is useful across the entire organisation.

Consider the case of a building society that built a better self-service operation. Customers love the improved access to information, of course. But the new-product team also loves the technology, because it includes analytics capabilities that provide very helpful insights into customer needs and preferences. Tracking customer queries provides details about what customers are looking for, which helps in the planning of new products.

The marketing team also finds helpful insights for creating more effective marketing campaigns. Think about it – ultimately, marketing at its core is all about discerning the needs of customers and telling them how your company can fulfill them, and customer service information has everything to do with the needs of customers.

The most powerful FAQ databases are not just tools for customers. They're like on-going surveys and focus groups – goldmines turning out volumes of precious information for the benefit of the rest of the company.

"Employing" Virtual Agents

The virtual agent takes the FAQ concept a step further, offering online access to answers in a way that's even more engaging. It, too, recognises natural-language questions, but builds in more personality that feels more . . . well, personal.

The virtual agent system also climbs into decision trees, which means what once was a static list of Q&As can now make great strides toward actually solving problems without the need for a human being. Rather than simply comprehending one question and delivering an answer, the agent can walk users through a carefully structured series of questions, and come up with just the right answer.

A truly integrated, multi-channel online customer service system also might give customers access to virtual agents via connection points other than the website. For example, a virtual agent interaction can potentially be triggered by a visit to your company's Facebook page, if you wish to set things up that way.

More Reasons to Satisfy Customers

Customer retention is an excellent reason to be very serious about customer service. Aberdeen Group research, for example, has found that a multi-channel knowledge strategy can increase retention by 5 per cent and also lead to an 8 per cent increase in revenue. Customers unhappy with service, on the other hand, will often entertain thoughts about leaving and using a competitor.

Utility customers don't always have that choice, though. They may not have the ability to switch to a different company. But that doesn't mean utility companies are free to simply ignore customer service. Utility suppliers may have regulatory reasons for ensuring top-notch customer service, with accurate information and consistent processes. There can be serious repercussions if customer complaint guidelines aren't met.

That's a good motivation for maintaining a comprehensive customer service knowledge-base. That way, you can be sure you're serving up consistent information no matter how a customer makes contact.

Whatever the industry, effective online self-service can result in satisfaction levels that are almost unbelievable. One water utility has a self-service tool that handles approximately 20,000 interactions every month, and finds that 97 per cent of those interactions successfully resolve the query.

Chapter 3

Striking Up a Chat

*S*ome customer service situations demand a live conversation with a real human being as the only real solution. But that doesn't necessarily mean picking up the phone. Live online chat is an increasingly prominent customer service solution, one that (once again) works quite well for both the company and the customer.

This chapter outlines some of the advantages of online chat as a customer service tool, and some of the latest advances. Live chat has most of the benefits of a phone call, and while it might seem to some to be a bit less personal than a phone call, plenty of people actually prefer it that way.

Chatting Without a Phone

Live online chat has caught fire remarkably quickly across the customer service world. And why not? Customers are increasingly comfortable using this format to make contact with companies. Fully a quarter of customers now report that they would use live chat to contact customer service if they can't resolve their issue through online self-service.

REMEMBER

In some cases, customers are even more comfortable with chat than taking part in an actual voice conversation. Research suggests, for example, that a lot of people would rather type out a keyboard conversation about a late bill payment, than discuss it on the phone.

Consider this: eDigital research has found live chat to be the most satisfying of all online customer service channels, with a satisfaction rate of 73 per cent. It gets the job done, and does so without requiring customers to leave the service channel they've chosen: the Internet. It's a seamless way for them to make contact without taking their fingers off the computer keyboard.

Providing a chat box avoids the need for customers to dial their way through a phone tree or an IVR loop. The chat box is there, without the phone experience that some customers find to be a hassle. Response times are often shorter, too, because agents are able to handle two or three chat sessions simultaneously, rather than just a single phone call. It's efficient on the contact centre end, and when done well, customers have no idea that they're not the one and only focus of the agent's attention.

Live chat fits well into a full, multi-channel customer service strategy, and like all of the other channels, when used properly it can satisfy the customer and bring quick issue resolution. One water utility built live chat into its multi-channel solution and found that it reduced the number of forms submitted through other channels. Live chat took care of the more complex needs for which other channels were less ideal. The end result was that 80 per cent of customers who tapped into live chat were satisfied enough that they would use it again in the future.

Who likes to chat? Without making too many wild generalisations, it does appear to researchers that younger customers are more comfortable with the concept than are older ones. We're talking the 18 to 34 crowd, who seem to like using chat to get their quick questions answered while online shopping.

Live chat is also a channel of choice to those who require privacy, for instance in a crowded space or office who don't wish to utter personal details over a phone, but can instead discreetly type a conversation. It can also offer a life line for someone with a hearing impairment, allowing them to converse through chat.

Live chatters seem to appreciate the relative anonymity, particularly if they're asking questions that would be more difficult to ask face-to-face or even on the phone. And chatting is not all that different from texting a friend, a very common and comfortable modern medium for communication.

Chatting Tactically

Certainly, live chat is great for resolving issues. Customers can compose their thoughts as they report the issue they're experiencing, and they can take away a written transcript of their interaction, which can be helpful if it contains advice on follow-up steps. It certainly beats taking notes with a phone cradled on your neck.

Organisations using chat primarily for troubleshooting are missing some fantastic opportunities, including successful sales closings and upsells. Synthetix research suggests that three in ten companies actively use chat as part of the sales effort, and that number is on the rise. Live chat has been shown to enhance customer loyalty, increase the sales conversion rate, and cut down on shopping cart abandonment.

Here's some research from Forrester shedding some light on customer preferences:

- Nearly two out of five customers said their decision to purchase was influenced by a successful online chat session.
- 44 per cent said the ability to have questions answered through live chat is one of the most important features a website could offer.
- 62 per cent said having live chat available would make them more likely to buy from the website again.

Other researchers have documented similar findings about the sales power of chat. Shopify, for example, found that live chat users filled their shopping carts with up to 48 per cent more stuff, and were three times more likely to make a return shopping visit.

The question is, how can you engage online shoppers at just the right time with a chat invitation? You can and should put a chat button on the website, but don't expect every chat-persuadable buyer to reach out and push that button. It's better to reach out proactively with chat, right when the potential buyer needs the interaction.

Easier said than done, of course. Many people shopping or paying a bill online have had a chat window open itself up at an intrusive time. In that case it's more of an annoyance than a positive experience builder. The secret is to create chat opportunities that open themselves up based on customer behaviour, and it takes quite a bit of study and observation to figure out what the optimal triggering behaviours look like.

The most obvious time to offer chat is when it appears that the customer is becoming bogged down or stalled while working toward completing a purchase. That's a sign that the customer may have some questions or need some assurances before hitting the "purchase" button. Stepping in with an invitation to chat about it can be just what's needed to close the sale.

Be wary of the downsides, though. If you're building in technology to analyse visitor behaviour and open up a chat window at just the right time, you'd better have someone ready to chat. That seems rather obvious, but you'd be surprised how often a site will initiate a chat, then make the potential buyer wait. That's not a good way to form a profitable and lasting relationship. The customer may get frustrated and reach out to complain across another channel – or even worse, just go shop somewhere else.

The general rule is to respond to a chat request within 30 seconds, at the very least with a simple "hello" or a canned response. No one likes to wait, and odds are, your visitor won't. Sending a simple message will, at the least, get the conversation started, and potentially put the ball back into the court of the customer.

Being able to respond quickly enough requires carefully orchestrating your staffing, to be sure you have enough agents in place when the demand will be highest. It also means ensuring that if your agents are overloaded, the system stops initiating chats or allowing any more potential live

chatters until someone is free to handle the contact. It may seem unfortunate to turn away a potential chat opportunity, but that's better than starting a chat and then frustrating the potential customer on the other end.

Don't switch off chat when the phones are busy. Chat is a more efficient medium than the phone. Why not push a phone customer on hold to use the chat channel by promoting it through your IVR?

Live chat agents can certainly handle more than one conversation at a time. But it's critical to control such multi-tasking carefully. Generally speaking, it's not a good idea to have agents working more than three chats at the same time, or else they're liable to get distracted, confused, or delayed.

What does make sense is to make good use of those agents whose interaction skills are ideal for selling. Everyone has different strengths, and the agents who have mastered live chat are more likely to excel at selling and upselling.

Choosing the Right Technology

Effective chat is more than just instant messaging. The right technology can make it seem effortless on the part of the customer, and can increase its ability to engage.

Canned responses are central to an effective chat operation, but they must be used appropriately. They're there to help agents respond quickly and use the right tone and branding language, but customers will pick up on the canned nature if agents don't have the green light to edit and the ability to personalise canned responses for the situation. After all, the whole point is to create real conversation.

Building in strong knowledge-base connections also makes the chat more efficient and helps the agent respond as quickly as possible. This holds true regardless of the purpose of the chat. The knowledge-base must have not just troubleshooting information but also pertinent sales-related details, such as special offers and deals, and cues to guide the agent in upselling. This is one way live chat integrates itself into the whole multi-channel self-service operation.

Also helpful is technology showing the customer's real-time key presses to the contact centre agent, even before the customer hits the "send" button. With these live key press feeds, the agent can see what the customer is typing while the customer is still typing it, and that can result in a much faster response.

REMEMBER

Co-browsing also can be a helpful live chat addition. If the chat is a problem-solving conversation, it can be helpful to be able to see what the customer is seeing, and walk the customer through the solution. In essence, the chat agent is able to look over the shoulder of the customer and point to the solution.

When Chat Goes Wrong

Having established what a powerful tool live chat can be, it's worth noting that any powerful tool can be powerfully dangerous if not handled properly. Here are some ways it can inadvertently work to your disadvantage:

✔ **Too Much Chatting:** Live chat is unbeatable for certain customer service functions, but it's not ideal for everything. Resist the temptation to put it on every page. Remember that it still makes sense to try self-service FAQs first, because that frees up your agents to handle more of the issues for which chat is the best channel.

✔ **Conversation Without Purpose:** If contact centre agents are not properly skilled and equipped for effective chat, there's no point in making chat available. Agents must have strong connections to

knowledge-base information so they can truly be the expert on the other end of the conversation with the customer.

✔ **Chat That Gets in the Way:** Failing to use the best data analytics can result in chat windows popping up where customers don't want them.

✔ **Security Issues:** Ensure that the software driving your chat has the latest security measures in place, just as you would any other part of your IT infrastructure. After all, your customer may be sharing personal account information and other details that really need to remain secure – plus, you want your customer to *feel* secure. So be certain your vendor gets regular external security audits, and has a compliance programme in place to ensure real peace of mind.

Having this kind of capability can help close a sale in the short term. But it also can build loyalty in the long term. You know what they say about teaching someone to fish. Co-browsing can leave the customer with greater ability and motivation to be a return customer.

Video chat can add a personal touch to the live chat experience. If your customer can see the agent on the other end, it can be more engaging and assuring that there really is a human, not some sort of automation. On the other hand, video chat is costly to implement, requiring special training and a video-friendly contact centre setting. And if the customer has Internet bandwidth issues, as many do, video runs the risk of creating frustration.

Chapter 4

Connecting Via Email

• ••

In This Chapter

▶ Staying in touch through email

▶ Making use of forms

▶ Reducing the number of messages

• ••

*E*mail is one of the most basic functions of the Internet. Every day well over 100 billion emails dart back and forth through cyberspace, and some of them contain customer service queries about your organisation's product or service. You need to keep in touch with your customers by email, but it's not always the most efficient way to provide customer service.

This chapter explores the tips and tricks for making email work better for customer service. It spells out the drawbacks of email-based customer service, and explains how forms can solve many of those issues and help email-style contact fit seamlessly into your multi-channel strategy.

The Rise and Rise of Email

Think back to the early days of the Internet – what were people using it for? They were checking news headlines, reading brochure-like information posted on relatively static websites, and they were sending and receiving emails.

It's no real surprise that email was the first online customer service channel to really gain acceptance, because it was one of the first Internet functions to gain acceptance. It's second-nature for most customers now, who long ago became as accustomed to sending an email as they were to picking up the phone.

The irony is, as email became such an integral part of users' Internet experience, many people forgot that it has its drawbacks compared with other communication channels. People started emailing when they still might have been better off picking up the phone. Most importantly, for all of email's efficiencies in certain situations, when you're trying to resolve some kind of issue, multiple back-and-forth contacts might be required.

This back-and-forth happens with ease in an in-person conversation, or on the phone, or in a live chat environment. With email, however, each piece of the conversation requires a new email. That's not the most efficient way of doing things.

Fortunately, there are ways to take the comfort and familiarity of email and make it more efficient and effective. The goal is to more tightly integrate email – along with those things that are more or less like email – with the rest of the multi-channel customer service operation.

Using Web Forms

Think of an email as a blank sheet of paper. That's really what it is, other than the fact that no trees were cut down to create that electronic blank page. A blank sheet of paper is a powerful thing when put into the hands of a creative person, but it can absolutely paralyse a lot of people. What should they put on that page? Where do they begin?

In the context of customer service, that blank page is a terrible place to start. When the only thing your customer begins with is an email address, that customer has no idea what kind of information you really require in order to serve whatever the customer's need might be.

Forms can really start to become your friend if you stop to consider what you'd like to include. You're no longer presenting the customer with a blank sheet of paper. Instead, you're building some structure into the conversation from the very start. You may not yet know what the problem or need is, but you're asking the right questions to figure it out.

Looking back again at those early Internet days, the first contact forms tended to be pretty generic. What's your name?

What's your address? What's your email address, and your phone number? And what is it that you want to ask?

The most effective forms these days are anything but generic. They have very specific fields, seeking information that will be pertinent for efficiently routing a customer's contact to the right place.

REMEMBER

Well-designed forms also invite customers to upload and send along supporting documentation. That serves a couple of important purposes. First, it helps collect pertinent information upfront, potentially reducing one or more back-and-forth email exchanges. Second, building the capability for uploading documentation into the form makes it possible for the customer to stay in the channel where he or she started. No need to click out of that web form and go over to an email app to send an attachment. Every time a customer has to change channels, there's a risk that customer simply tunes out completely.

Reducing the Volume

How many people these days open up their email and exclaim, "I wish I would get more email"? On the contrary, the volume of email is a common complaint for personal and business email users alike. With regard to customer service emails, the smart use of forms can help reduce that volume of email and crank up the volume on customer satisfaction.

REMEMBER

Unlike those early, very generic name-address-phone-issue forms, today's forms can be intelligent. Not only can they be specific enough to gather pertinent info upfront and accurately direct messages to the right place – they can actually prevent some messages from ever being sent in the first place.

This is yet another example of what "multi-channel" really means. Your forms should tie directly into your knowledge-base, because you just might be able to turn your contact area into a self-service opportunity.

TIP

With every word your customer types, the form can query the knowledge-base and look for a possible solution to the problem the customer is relating. This intelligent form can then make suggestions to the customer. These ideas are not

intrusive – the customer can easily dismiss them – but in many cases they can resolve the issue right then and there.

It's vital to be able to offer this contextual knowledge at every step of the intelligent web form process, and to take advantage of technology that constantly refines the knowledge to serve the customer. As you plan ways to help customers along their shopping, buying, and service journeys, you need a full understanding of all the information required to serve them most efficiently.

Another advanced technology you'd be wise to check out is the ability for contact centre agents to step in at appropriate times in the web form process with an invitation for live chat. Initiating a live chat at the right time allows the customer's needs to be met without having to wait for the back-and-forth of email.

One British retailer has discovered that more than 40 per cent of customers choose to chat when invited. They end up resolving their issue without ever hitting the "send" button on the form, and that speed and ease of use has been a real customer satisfier. It's one more way to bring customers to the right channel for their needs – in this case, live chat – even if they didn't initially realise that chat would be the best way to go.

REMEMBER

Smart forms can tap into the whole power of the multi-channel continuum. Their interaction with the knowledge-base can help the knowledge-base learn what issues customers are having, and which FAQ answers can most effectively resolve those problems.

They also feed into the management analytics that allow you to track usage of the FAQ knowledge-base. These are the analytics that not only help you keep that knowledge-base up-to-date and useful, but also help you keep a real-time watch over the kinds of issues that customers are experiencing right now. That's far more powerful than the email contact forms of yesterday, isn't it?

Chapter 5

Finding More Channels

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*T*he list of ways to make the connection between customers and customer service grows almost daily.

Back in the day, mail and phones were our main forms of communication, and most of the phones back then didn't even have push buttons. Along came connections through desktop computers and the Internet, then laptops, then smartphones and tablets, and now smart watches. It's not hard to imagine the day when people have chips implanted in their brains for the ultimate direct connection (and don't worry too much that we'll all turn into evil robots – that's just Hollywood's interpretation, we promise!).

This chapter explores some of the latest channels for connecting with customers. How does the smartphone change the customer service equation? What about all the social media links? And is there value in tapping into the brains of other customers?

Mobile Customer Service

With a smartphone in most every pocket or handbag, customers can reach out whenever they want, wherever they are. Industry analysts believe there are roughly two billion smartphones in use across the planet, and nearly two-thirds of all mobile users in the UK have access to a smartphone.

REMEMBER

Given that reality, virtually every multi-channel customer service operation must be built with the needs of smartphone users in mind. That means services must be tailored to mobile devices, with a responsive design and content that won't overwhelm a small screen.

WARNING!

Many companies aren't doing a great job of this so far, according to researchers, and mobile customers don't have a lot of patience with them. For example, Limelight Networks research found that of those customers who have a bad experience trying to shop via mobile device, 80 per cent abandon the process entirely. Only a fraction persist and move to a computer, while the rest simply give up or go to a competitor's mobile site.

In a way, that's not all that surprising. People who are trying to accomplish something on a mobile device are doing so because they don't want to wait until they're in front of a computer. Whatever it is they're trying to do, they want to do it *now*, and if they get frustrated by your site, they're likely to move on to something else.

Successful organisations respond by simplifying what they can in the mobile environment. They may have an app or they may create a mobile-optimised website, but either way, the content tends to be pared down to fit mobile constraints.

TIP

It's worth noting that while smartphones can create headaches for businesses, they also offer some advantages. Depending on how your site or app is set up, it may be able to tap into the mobile user's GPS-enabled location, which can provide useful information. You also may be able to identify the customer in ways that aren't possible through other channels.

Some organisations have been challenged by mobile-focused customer service channels because they tend to cut across traditional areas of focus. Phone calls have historically been the province of the contact centre, but smartphones do so much more than just place calls. For example, they also connect with social media, which in some organisations is considered to be a marketing focus.

That's all the more reason to truly integrate the operation across channels. Customers don't care in the least who is in charge of what – they just want consistent information across all channels. Anything short of that makes them cranky.

They want those channels to work together seamlessly, which is a challenge in and of itself in the mobile world. Be sure to make it as easy as possible to shift to a different channel if necessary – make phone and email contact information easy to find and use on the mobile device.

With the ever-increasing menu of channel options, it's vital to understand where customers are turning and how they're trying to connect with you. Be sure to analyse usage by channel, to best understand how customers are trying to connect.

Social Customer Service

Facebook, Twitter, Instagram, and other social media channels are increasingly valuable customer service tools. Allowing contact through these channels is vital, and they also offer opportunities for sentiment analysis.

Just as you can't ignore the need to provide customer service options geared toward smartphones, you can't afford to bypass social media channels. They're everywhere, it seems, they are growing, and they're playing a significant role in shaping opinion about your organisation.

The prospects are a bit scary, it must be said. The social media channel is one you can sometimes influence, but never completely control. Depending on the venue, you may be faced with complaints or customer service concerns that are aired very publicly. Word of mouth is nothing new, but social media gives word of mouth a megaphone and encourages customers to shout.

While Facebook or Twitter have not always been seen as typical venues for receiving complaints, an increasing number of businesses view social media channels as helpful for acting on those complaints.

TIP

No business likes to see negative comments aired as publicly as they are when they circulate through social media. But consider reframing the situation as an opportunity to publicly demonstrate positive and responsive customer service. In that regard, not all bad publicity turns out to be bad in the end, as long as it's handled professionally and appropriately.

All that said, social media channels offer ways to proactively provide customer service, too – not just respond to complaints aired via tweet or Facebook post. Remember, your organisation's Facebook presence is a vital point of contact with current and potential customers, and you need to ensure that service options are handy at all points of contact.

There's no reason for social media users to move to a different channel just to access your FAQs. Take advantage of services that bring your FAQ self-service to social networks, and connect with your customers where they want to be.

REMEMBER

A growing number of companies view social media as a prime place to operate a fully supported customer service channel. These companies allocate resources to monitoring and moderating social media, not just from a marketing perspective, but with a service-focused eye as well.

One more important point about social media. If you're a Facebook user, take a moment to consider why you are – you want to know what's new with your friends, and what they think about important issues and events. Similarly, social media channels provide your organisation with a valuable way to gauge what your customers and potential customers are thinking, about you as well as your competition. Analysing customer sentiment is a critical element in developing better products and services, to anticipating customer service needs as they're building.

Engaging Customer Expertise

The Internet is a great place to connect with like-minded people, including plenty who have similar interests and experiences. That's good for social connections as well as information sharing.

Though you may think of yourself as the expert on your company's product, other users out there will also have a lot of experience with the product, and some hands-on expertise. These users can be a valuable resource from a customer service perspective, which is why many product manufacturers tap into them to crowdsource answers to other customers' questions.

Consider this: You have a potentially large community of product users out there. Depending on the size of your company and the type of product, there could be hundreds or thousands or even more of them. They have worked with your product, figured out answers to issues they've had, sometimes even created workarounds that your engineers never imagined. Why not connect these super-users with one another as part of your multi-channel customer service solution?

The advantages of this concept are significant:

✔ The user community is open 24/7, while your customer service department might or might not be.

✔ These users are creative, and may have encountered both problems and solutions that are new to you.

✔ Inviting their expertise is a great way to build their loyalty to your product and brand. You're engaging them, and you're publicly showing that you value them and trust them.

✔ This is a low-cost solution. It does not by any means replace the need for internal customer service, but a crowdsourced answer is essentially free, and it just might divert a call from hitting your contact centre.

Of course, crowdsourced tech support and customer service is not entirely under your control, so it requires careful monitoring and moderating. Your own experts also need to weigh in from time to time to offer their own ideas and solutions, or to provide clarification. While crowdsourcing allows you to gain valuable ideas and insights from customers, don't let users grab the steering wheel of your

customer service strategy. It's vital that a crowdsourced forum remains an avenue for great ideas, and doesn't escalate into a public collection of complaints.

By crowdsourcing aspects of customer service, you'll wind up with happier customers, and you're likely to generate additional content for your knowledge-base (after you've vetted the crowdsourced advice to ensure that it's correct and appropriate).

Chapter 6

Being a Repository of Knowledge

*I*f companies could hire know-it-alls and employ them forever, knowledge management would be a snap – just ask the expert, and the answer is always there. In the real world, though, no such person exists. Each company needs its own knowledge-base, a repository that feeds information across the multiple channels of customer service, including contact centre agents and, of course, customers.

This chapter digs into the details of the knowledge-base. It's vital that one source informs everyone, and that it be adaptable to ongoing learning and change.

Finding Knowledge Everywhere

Customers want reliable information about a company's products or services, and one would think good information would be just a click or a phone call away. Surprisingly, it's not necessarily that simple, because information sources don't always agree with one another.

In fact, one study in the UK found that more than a third of customers found information online that conflicted with what someone at the contact centre said. Which information was

the right information? Who knows? Both sources ought to be reliable. And if two reliable sources can't be relied upon to agree with one another, that leaves some customers wondering whether the company really has its act together.

REMEMBER

Maintaining a single source of truth is vital, to ensure consistency of information across all channels. Companies and organisations must create an internal knowledge-base, then make sure all customer service channels are plugged into it.

That includes not just the contact centre as accessed via telephone, but also contacts returned via email, conversations conducted via live chat, social media, and interactions in the retail setting. All of those channels must have access to the same source of information, and it must be kept up-to-date.

Connecting to the Contact Centre

The contact centre is an ideal place to start when building the internal knowledge-base.

REMEMBER

Remember that the knowledge must be easily accessible, or you might as well not have that knowledge. If you're in school and you can't recall the facts you need when you're taking an exam, your knowledge isn't worth much. The same holds true with internal company information that you plan to use for customer service.

As it turns out, a lot of companies have this problem when it comes to the repository of internal information that the contact centre and other customer service channels must access. For some companies, the knowledge-base is really more of a traditional document-management situation that requires a lot of searching. Put another way, this kind of old-style system has very poor discoverability.

It's not surprising that it started out that way. The beginnings of the typical knowledge-base were some paper files, then the collection grew and became more time-consuming to manage than anyone could reasonably devote. What is sometimes missing in this evolution is competent knowledge management, the key to keeping a knowledge-base discoverable and useful for the long term.

Back in Chapter 2 we talked about the external FAQs, and how easily searchable they must be. But the internal knowledge-base must be just as easily searchable as the external FAQs. Search technology is just as important internally as it is externally.

It's vital to keep that in mind when determining the vendor for the knowledge-base. Consider the functionality of the software solution carefully. It might include such features as natural language searches, automation for the organisation and retrieval of documents, some way to rate how accurate articles are, and dynamic production of FAQs.

Truth be told, there's no reason why the external knowledge-base shouldn't tap into the same source of truth as the internal knowledge-base. Consistency is vital, and that's the best way to keep the message on the same page, regardless of channel.

In fact, according to Aberdeen Group research, companies that tap into internal knowledge-bases to provide customer service gain a lot by doing so:

✔ Their cross-sell and upsell revenue grows, by as much as 11 per cent.

✔ Their revenue per customer tends to increase, by an average of 8 per cent.

✔ Their customer retention grows by 5 per cent.

✔ First-call resolution improves by roughly 8 per cent.

Sharing the Knowledge

The knowledge-base is an amazing thing, packed with more information than any one person could be expected to know. That raises a daunting question: Does the knowledge-base know enough? What doesn't it know that it should know? Who is qualified to make that determination?

To begin with, how about the agents whose daily work takes them deep into the knowledge-base? They may not be subject matter experts on everything, but they start to know that knowledge-base and what's in it, and they can have excellent

insights into what's missing. The customers with whom they interact also can shed light on what needs to be there to better serve their needs.

Such insights help keep the knowledge-base a living, growing, evolving thing. As agents and customers point out gaps, product experts come in to fill the gaps. It may require a full-time person, or more, to maintain a knowledge-base and help it evolve. Or, learning capabilities may be built right in. The automated systems within a knowledge-base may be able to adjust and adapt to changing requirements of agents and callers.

It's essential to have a system where the agents working in the knowledge-base are able to make suggestions. They're not likely to be the ones acting on those suggestions and putting info into the knowledge-base, but their input is essential for bringing about constant evolution and continuous improvement.

Note the distinction between the system driving the knowledge-base, and the task of knowledge management itself. Various vendors offer you a knowledge-base system, but as mentioned earlier, you'll also need a person (or people) whose job it is to curate that knowledge.

Choose your knowledge-base vendor carefully, because the right technology will make it much simpler and easier for your knowledge management specialist to update information. The job of daily knowledge management should be to focus as much as possible on the knowledge itself, without the need for a lot of technical expertise on running the knowledge-base.

Chapter 7

Making It Happen

*C*onvinced of the virtues of multi-channel customer service? That's a great thing, and your customers will appreciate that very much. The next question becomes, how do you get there?

This chapter spells out some of the things you'll need to think about as you plan your multi-channel approach. A major decision to ponder is whether your operation will be based on-premise or in the cloud. Also, you've got security questions to answer, and you'll need to connect with the right vendor.

Storing Cloud-Based or On-Premise?

What is "the cloud"? Simply put, *the cloud* refers to software and services that run on the Internet instead of your computer. The term "the cloud" has been around since at least the 1990s, around the time that the World Wide Web began to grow exponentially. The migration of technological functions to off-premise resources has really taken off in the past several years, to the point where nearly everyone has some personal information stored in the cloud (whether they realise it or not).

As you plan your implementation of multi-channel customer service, you'll inevitably be faced with the decision of whether to build at your location or somewhere in the cloud. More and more contact centre managers are ditching their on-premise legacy providers and choosing cloud-hosted solutions for their telephony, customer relationship management, and multi-channel customer service. They're going for what's known as SaaS, short for *software as a service*.

They're doing so because of the promise of considerable cost savings, thanks to reduced staffing requirements, lower maintenance expenses, and less power consumption. They're also attracted by the potential for significant gains in flexibility.

When deciding whether to use the cloud or not, it's important to make sure you're basing your consideration on the most up-to-date insights, because many of the concerns that used to turn some companies away from the cloud aren't really issues anymore. For example, security and stability were early concerns that some people had about cloud solutions. But check what cloud computing pioneers such as Amazon, Microsoft, and Google are up to, and you'll find that they've addressed and overcome those issues.

What the cloud-savvy companies know, and all companies should consider, is that now's not the time to get nostalgic about the way things have been done in the past. This is truly the "age of the customer," marked by dramatically changing customer behaviour, and those companies that don't adapt may become irrelevant.

Still, it's not an easy choice to leave the legacy system behind. Some contact centre managers worry about losing information, or fear that it'll be difficult to train people on the new system. They wonder if it would be better to bolt some new technology onto their legacy system.

The problem with that thinking is that most legacy systems aren't especially nimble when it comes to adapting to changing customer behaviour. Cloud-based, automatically updated technology, on the other hand, is great at adapting. So much better, in fact, that it's usually worth making the switch. Adopting the latest technologies will not just enhance customer service, but will help resolve most customer enquiries quickly and efficiently. That means happier customers, and everyone knows how valuable that is.

The other thinking that has some people wanting to hang onto older technologies is the idea that over a period of five years or so, all of the on-site infrastructure costs will have paid for themselves. That's a notion worth questioning, though. Even if hardware lasts, there are all kinds of ongoing costs, such as hardware additions, backup and recovery, tech support, and other maintenance.

Here are some things to consider as you review your options:

- ✔ **Cost:** Cloud or SaaS solutions fall under the category of *operating expenses*. They're subscription-based, with the cost often depending on the number of users or sessions. Upfront costs are minimal with a cloud solution. The cost of on-premises operations falls under the category of *capital expenses*. There are upfront costs for hardware, software, air conditioning, lab space, and that kind of thing.

- ✔ **Customisation:** On-premise options may or may not be customisable. It depends on the vendor. The same can be said for cloud-based solutions.

- ✔ **Hardware:** A cloud solution does not have hardware hosting costs, just the cost of the computers needed to access the services. For an on-premise solution, you must foot the bill for hardware and system platforms to run the applications.

- ✔ **Security:** Risks associated with on-premise installations depend on the security measures taken by the user. In other words, it's totally up to you. For an SaaS, cloud-based solution, access is through the Internet. Choose a reputable vendor with strictest security protocols, and security risks are minimal.

- ✔ **Mobile access:** Because a cloud-based solution is just that, in the cloud, it's easily accessible from just about anywhere, on just about any kind of device. Offsite access is much trickier for an on-premise solution.

- ✔ **Integration:** An on-premise solution may integrate fairly well with existing software, but it's not likely to be as agile when it comes to updates. And its ability to integrate with cloud-based services is quite iffy, particularly because on-premise solutions are not always built with full Internet connectivity in mind. Integration involving cloud solutions varies depending on the vendor, but updates are painless, remote, and automatic.

> Cloud services tend to work well with one another, and often can be coordinated to allow single sign-on.

✔ **Control:** An on-premise user controls both systems and data, while a cloud solution has the SaaS provider in charge of systems and entrusted with customer data.

✔ **Ongoing relationship:** An on-premise model typically involves an upfront transaction with a vendor, who sells a license for the software and subsequent upgrades. After that, there may be much less contact. The relationship with the SaaS provider begins on Day One and is ongoing. It's essential to build a trusting relationship with the provider.

Staying Safe

It seems like there's a new story every week about a data security breach somewhere. It's enough to make some people steer clear of the Internet entirely, but that's obviously not an option if you truly want to do business in today's totally connected world.

REMEMBER

Needless to say, you'll want to make security a priority, given the fact that you're dealing with customers' sensitive personal information, account numbers, and financial data. You may think a bulletproof solution to data protection is "mission impossible," but you'll rest more easily if you know your SaaS vendor is well-versed in security measures. Any vendor you consider should have a security model for its SaaS operations, and should be eager to provide you with proof.

TIP

When you're checking out vendors, be on the lookout for signs of seriousness and professionalism regarding security. The vendor's security should be regularly audited by an external body. There should be a compliance program that will confirm the status of security related information a vendor provides.

Everything from web chats to email to personal data should be protected robustly from end-to-end, and at rest. There must be regular penetration testing by an external body, and compliance certification.

REMEMBER

If you're choosing to put your customer service operation into a cloud-based infrastructure, be certain there is 24/7 monitoring and a dedicated team for responding to incidents. Ask to be sure there are full backups, as well as a comprehensive business continuity plan that you can see. It's vital that the infrastructure be secure, stable, and reliable, during peak times, and all other times.

Finding the Right Vendor

Beyond security, there are multiple other things to consider as you search for a vendor. Here are some key questions to get to the bottom of:

- ✔ Can you choose what you want from the product portfolio – such as web self-service, social self-service, mobile self-service, live chat, email and form management, and contact centre knowledge management? Can you add other components later? How well can they scale up?

- ✔ Does the vendor have an integrated platform, or a loose collection of components? Does the vendor own all of the products, or are they a patchwork of unrelated pieces? How do the various products integrate?

- ✔ Where is the vendor based? Is it in your country or elsewhere? Equally important, where is the data stored? If it's not in your country, are there compliance issues related to where it's stored?

- ✔ What is the commercial payment model? Will you be charged a fixed cost, or a per-session cost? How will the payment model be impacted by peaks in usage – ones you can predict, as well as surprise peaks?

- ✔ What is the hosting infrastructure? Will increases or decreases in traffic affect the hosting fee?

- ✔ Will you own the data, or will the vendor? If you wish to change vendors at some point, will you be able to export your data and take it with you?

- ✔ What kinds of analytics are supplied?

- ✔ What kind of experience does the vendor have?

Chapter 8

Ten Tips for Agents and Administrators

*A*n effective multi-channel online customer service strategy doesn't just happen. It takes careful planning, meticulous deployment, and a whole lot of care and feeding. Read on for a series of tips aimed at both administrators and the agents on the front lines of customer service.

Keep an Eye on the Data

A multi-channel online customer service operation is a two-way street. You're spending a lot of time and effort on serving customers' needs and providing them with valuable information, but there's a lot of value for you, too, in the data on your customer interactions. Study it carefully to learn customer sentiment about you and your competitors, to determine which broad issues need to be addressed, to get ideas for new and improved products and services, to find out what channels are most effective for selling to your customers . . . the list goes on and on. The data related to customer service may not entirely replace market research, but you'll be amazed at the insights you can uncover.

Form the Most Effective Teams

A sports team has many different positions, and any individual player is likely to be better at some positions than others. Your customer service team is no different. You'll be a more successful team if you carefully assign members to the roles best suited for their own strengths – some excel at upselling, some work best in writing, others are great ambassadors over the phone. Some will be downright terrible at interacting with customers directly but have a knack for managing and updating the knowledge-base. All are important roles, but the operation won't win unless the players are doing what they do best, and working together as a team.

Don't Let Email Clog Other Channels

Email has its place in the grand scheme of multi-channel customer service, but it has its drawbacks, too. The more you can steer customers away from emails and forms, and toward self-service or such instant options as online chat, the better off everyone will be. Depending upon how you've set up your team, answering emails could potentially prevent agents from achieving the most benefit from other channels that can resolve issues more quickly and effectively. So, make a plan for reducing emails when you can, and address them when you must, without pulling resources from other channels.

Keep the Knowledge Fresh and Proactively Managed

Knowledge may be power, but outdated knowledge is, well. . . old. Once the knowledge-base has been built and connected to the various customer service channels, it's vital to manage it well so that it remains fresh and useful. Be sure to review the knowledge-base periodically to update or remove outdated tips, fixes, and offers. And be mindful of suggestions for improving the knowledge, opportunities to fill in gaps, and ideas for issue fixes that come from the minds of loyal customers.

Focus on Tone, Etiquette, and Grammar

Your customer service agents are your public face to your customers. Depending on your business and how you sell, your agents may be the only human contact customers have, so it's important that they present themselves as professionally as possible. This requires a careful focus on hiring, training, and deploying agents. Clearly, you must employ agents who communicate well, and it's vital to monitor their interactions to identify areas where you can help them improve. Also be certain that you have them working the channels where they perform the best.

Use Templates for Responses

Some people call them "canned responses," but "templates" certainly sounds less deprecating. That's appropriate, because templates are only a bad thing if they're overused to the point that your human agents begin to sound like robots. Templates, when used properly, help your agents respond more promptly, effectively, and completely. They help prevent spelling and grammar errors. They ensure that the message or bit of advice is delivered accurately and consistently. And they make certain that responses are delivered with the proper tone and branding considerations.

Personalise the Message

Having just established the importance of templates, it's now vital to add that they have their dangers. The biggest is their potential to seem impersonal. Agents must have the flexibility (and the skills) to personalise the message so that it fits the profile and needs of the customer, and suits the situation. Personalisation helps the chat conversation feel human and perfectly tailored for the issue being discussed, even if the chat is largely driven by templates.

Help Agents Collaborate

You've built a team of agents, not just a collection of individuals. Each has strengths, each has areas where improvement is possible, and if you provide the right opportunities, they can learn from one another and help each other better serve customers. Facilitate collaboration both formally and informally, with processes for cooperatively addressing issues and achieving smooth handoffs.

Listen to Your Agents

Build ways to gather feedback from agents and analyse the customer queries they collect. This helps to identify gaps in the knowledge-base that need to be filled, as well as uncovering opportunities to improve the information already there and the processes for connecting with customers. Agents are your eyes and ears in the field, your boots on the ground, and they will inevitably have valuable insights to share if you encourage them to speak up and listen to them when they do.

Train and Update Agents Regularly

Your products and services most likely change and evolve periodically, and you must keep your agents up to speed. Of course, a part of this involves regular maintenance of the knowledge-base, but it also pays to provide regular agent training. Besides, it's not just a matter of updating their product knowledge – agents need refreshers and ongoing practice on customer service tactics and skills. They'll feel better about their jobs, and will perform much more effectively.

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A guide for serving customers seamlessly and effectively through all channels

Customer service used to be just a phone call away. It still is, of course, but forward-thinking companies are carefully coordinating and integrating customer service activities across multiple channels, including telephone, email, live chat, social media, and online self-service. The key to making it work well is a powerful, well-maintained knowledge-base that's plugged into every channel.

- *Reach customers on their terms – make connections that resolve issues conveniently and quickly*

- *Ensure consistent information – serve up the same helpful answers, regardless of the channel*

- *Boost satisfaction levels – surprise customers with fantastic service before, during, and after the purchase*

- *Operate more efficiently – build a customer-service operation that works better but costs less*

- *Find expert assistance – choose a vendor that can make multi-channel customer service work for you*

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