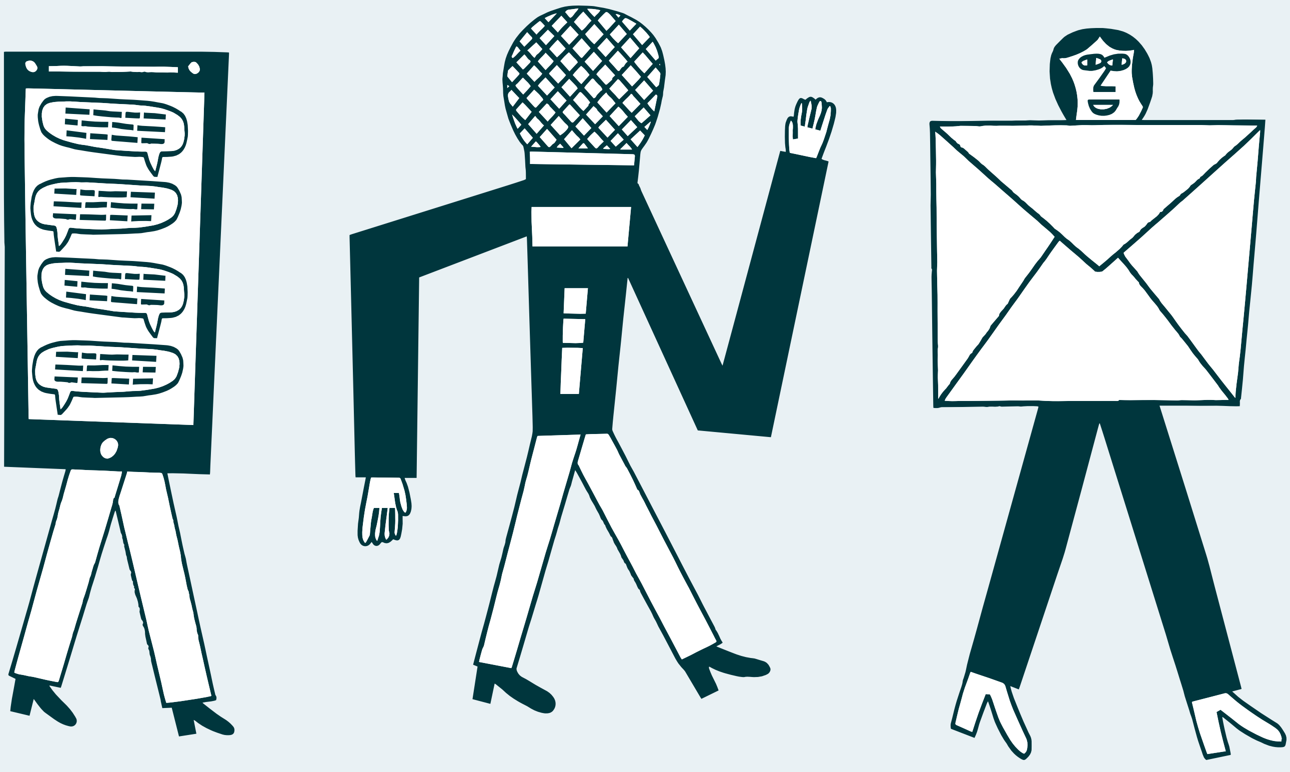
Roll out and manage multiple customer service channels



By communicating with your customers across multiple customer service channels, you have the opportunity to build more, and better, relationships.

The number of ways that we have to interact with customers continues to increase. We are now always connected in some way to channels of communication that can be used for having a discussion with and supporting our customers.

Customers both want and expect to be able to contact businesses in more than one way. They also want a consistent experience across all of those channels, so it's important to not only provide support using multiple channels, but to also think about how those multiple channels are used together to create a unified and consistent omnichannel experience.

As the providers of customer service and the builders of great customer relationships, it's up to you to adapt to the new forms of communication and ensure that you're providing and supporting the channels that your customers prefer and expect to be supported.

This means that there's a near constant need to stay on top of your channel strategy. No doubt, most companies and organizations offer more than one support channel, but even providing just two (let's say email and talk) requires resources, training, and channel management processes that are specific to each; each channel has its own set of challenges.

You can find more information about the business value of providing omnichannel support in the Zendesk eBook, The ROI case for omnichannel support.

About this guide

In this leadership guide, we explore the challenges faced when rolling out a new channel and when managing multiple channels simultaneously. Here are the topics covered in this guide:

Supporting multiple customer service channels

Deciding which channels to support is based on several factors: the channels your customers prefer to use and those that you can effectively operationalize into your support offerings. In many cases, you may be forced into the decision to support a new channel based on trends and demographics and the need to remain competitive in your market.

For example, live chat has quickly emerged as a favorite channel of communication and the one that provides the highest customer satisfaction rating according to a recent Zendesk benchmark study. For customers, it's convenient and immediate and requires less effort than many other support channels. For customer service organizations, it's efficient and effective and allows agents to help more customers in a shorter amount of time.

Self-service is a popular channel with customers as well. According to a report entitled "Trends 2015: The Future of Customer Service" by Kate Leggett of Forrester Research, 76% of those surveyed chose to use the help or FAQs available on a company's website over other channels. The expectation is that needed information is available online and that it's easy to locate and use. This is a good trend because it results in fewer support interactions; more deflected tickets. We're now seeing a new channel emerging, messaging. Similar to chat, it enables a customer and an agent to quickly exchange short text messages.

But unlike chat, messaging allows us to move on to other tasks while we're having a conversation; messaging doesn't have to be our single point of focus. New messages pop up wherever we happened to have navigated to on our mobile device, for example, in the course of a messaging conversation. Messaging also allows companies to either automate the exchange using chatbots or provide human interactions—or both. Messaging, like chat, is also a good way to leverage your self-service knowledge base by surfacing that content in messages via excerpts or links to KB articles in your help center.

Providing customers with self-service options via access to a knowledge base of some kind is important. It addresses a customer preference and it helps you scale and deflect tickets. While self-service, and support channels that result in tickets and email exchanges, go a long way in reducing support issues, it's also important to provide some live support such as chat, talk, and messaging. Customers need a way to make more immediate one-to-one connections.

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Trends 2015: The Future of Customer Service, Forrester Research

Anticipating and managing channel volume

When you roll out a new customer service channel, you're opening up a new way for your customers to reach you. But how many will take you up on that offer? This can be hard to predict, but you can make educated guesses based on the level of customer engagement you have in your existing channels, as measured by the frequency of requests you currently get. The rate in your new channel might be higher or lower, depending on factors such as:

- How actively and visibly do you announce or market the new channel?
- Is the new channel easier to access than your existing channels? For example, is it embedded in your product where existing channels have required going outside the product?
- Does the new channel allow for faster responses or resolution of issues? If so, that could encourage more customers to reach out to your support team.
- You may also experience a short-term surge in requests on the new channel as customers may simply want to take it for a test drive.

Another aspect of volume is the question of how a new channel will affect engagement on your existing channels. If customers start turning to the new channel in preference over an existing channel (e.g., chat or talk over email), that can blunt the increase of requests you may see overall. While that might mean more work for your team, it's also giving you the opportunity to address issues that might have otherwise resulted in the customer giving up and moving on.

A great way to help you discover what the increased demand might be is to roll out the channel slowly to a subset of your customer base. This could be your highest-paying customers, trial customers or prospects, or it might be customers that are working with a particularly challenging part of your product or service. You could do this by contacting the customers directly or only revealing the channel to a select group. After you've gotten an idea of how this group engages with this channel versus your other channels, you can determine whether it's feasible to expand it to a larger group.

Staffing for the new channel rollout

So how do you staff a new channel? It should go without saying that you want to put your best foot forward when providing a new channel to your customers. You don't want the new channel to have a negative effect on customer satisfaction. With that in mind, here are some suggestions for staffing the rollout.

1. Take a phased approach to the rollout.

Begin with a beta and staff the channel with senior team members who have been trained to support the new channel. Senior agents will be able to answer questions quickly and accurately and are less likely to be thrown by any workflow change.

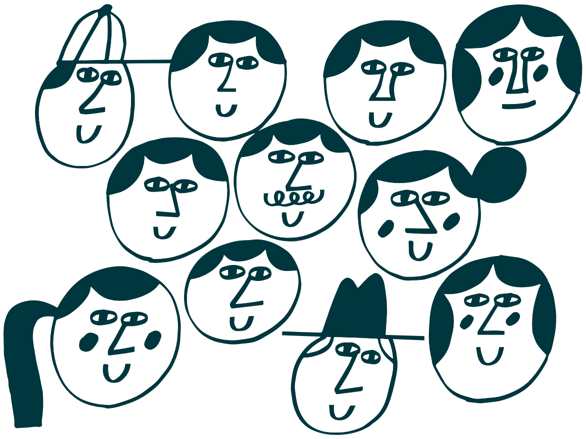
2. Take advantage of agents who have had experience using this channel in previous jobs.

These could be agents you already have on your staff or new agents you'll hire to support the new channel.

3. Keep channel shifts short at the beginning.

If you have sufficient staff, it can be worthwhile to keep shifts short at the beginning, rotating through your agents so they can experience the channel and then process any lessons they learn.

This advice can be applied to any channel rollout, but some channels have their own set of staffing best practices. In the Rolling out live chat and providing proactive customer service leadership guide, we go into more detail about staffing best practices for the chat channel. You'll find best practices for the talk and social media channels in How new channels affect the way agents manage their work below.



Training agents to support the new channel

Many channels generate support requests that result in helpdesk tickets and the agent to customer interaction happens within that interface and therefore mostly through email. Many of the processes and customer interactions will be similar across those channels and so will your training. An exception to that is Twitter, which is a public facing channel and requires more response guidance for agents and is also more time sensitive.

You'll want specific instructions for channels that enable live interactions (talk, text chat, video chat, and messaging) where the ticket is an end result of the interaction and is used for follow up and tracking. The medium dictates customer interaction best practices. As you'll see in the following section, they vary by channel.

The following training best practices apply to all channels:

1. Practice using the new channel.

Your team should practice using the new channel with each other to simulate what it will be like with customers before rolling it out. This practice may reveal situations and special cases that you might not have thought of without having done some testing first. After it is rolled out, you can use this same process to train new agents on the channel.

2. Use experienced agents as trainers.

Use experienced agents to train other agents how to support customers on the new channel.

3. Assign a channel lead.

For distributed support organizations, select a senior team member to be the channel lead for each location. It is then their job to train the rest of the team as needed.

4. Document your training.

For scalability, document training in a slide deck or internal KB article, for example, or capture a training session on video.

How new channels affect the way agents manage their work

Your agents' typical workflow might be to start their day by checking for and responding to customer replies from the previous day, then taking a new ticket from the queue, working or escalating that as required, and then moving on to the next one. Live channels and social media channels, however, change the way agents interact with customers. Rather than reacting to support requests that have found their way into the ticket queue through various channels to be picked off one at a time, live channels require live action and reacting in the moment. Let's take a look at a few examples of how certain channels affect an agent's workflow.

Chat

The chat channel makes it possible to work on multiple support requests simultaneously, which means that they should be able to solve more issues more quickly. But how many concurrent chats can an agent successfully manage? Our best practice recommendation is three; more than that can result in delayed responses to the customer and lower satisfaction ratings.

Managing multiple chats simultaneously also means that the agent has to constantly switch contexts as they think about the issues each customer raises. Some agents might find this easier than others.

When chat channel volume is low, agents may have "down time" that they can use to work traditional tickets, but that can be a trap if an agent takes on a lot of new tickets and then finds themselves swamped by a surge of chat requests. Therefore, it can be beneficial to be cautious about the number of tickets an agent has open when they're also responsible for responding to chats.

Chat-interaction best practices

For our complete list of recommended live-chat best practices, see [Essential customer service skills: how to interact with customers on live chat.]

Talk

Talk shares some similarities to chat in that it's a synchronous, or real-time, conversation with the customer. Unlike chat, however, agents can only effectively work one phone call at a time, which of course reduces the burden of context switching.

The challenge with the talk channel is trying to write everything down during a phone call. It's usually not possible. To handle this, agents can write notes in the ticket or do more research on the problem after the call has ended, during the "wrap-up time." This also means however that the agent is unavailable to take another call. Therefore, you might want to set guidelines for how much time agents can spend on wrap-up. After all, if all your talk agents are in wrap-up mode, there's no one available to take new calls.

If there's a surge in call volume, you may need to impose stricter limits on wrap-up time or even have agents who are working other channels jump on the phone to help handle the flood of calls. This means that those agents also need to be trained to support the talk channel as well.

Talk-interaction best practices

For our complete list of recommended talk-channel best practices, see Essential customer service skills: how to interact with customers on the phone.

Social media

Social media can be, and usually is, the place where frustrated customers go when they want to vent in a public space. As a result, managing the Twitter and Facebook channels requires a special mix of skills.

Agents need a sharp eye for technical details, the ability to read closely for emotional cues, the diplomacy and communication skills to defuse the situation and direct the customer to other channels as needed, and do all this while speaking in a voice that matches your company's social media personality and brand. You'll find an excellent discussion of this in the Relate article "Let's get real: the not so secret relationship of brands and customers online."

Social media agents need to be responsive, which could mean either that social media tickets are prioritized above other tickets or that you have designated staff responsible for dropping what they're otherwise doing to instead respond to your social media tickets quickly. Because of this, you probably shouldn't mix working the social media channels with talk or chat.

Social media-interaction best practices

For our complete list of recommended social media best practices, see Essential customer service skills: interacting with customers on social media.

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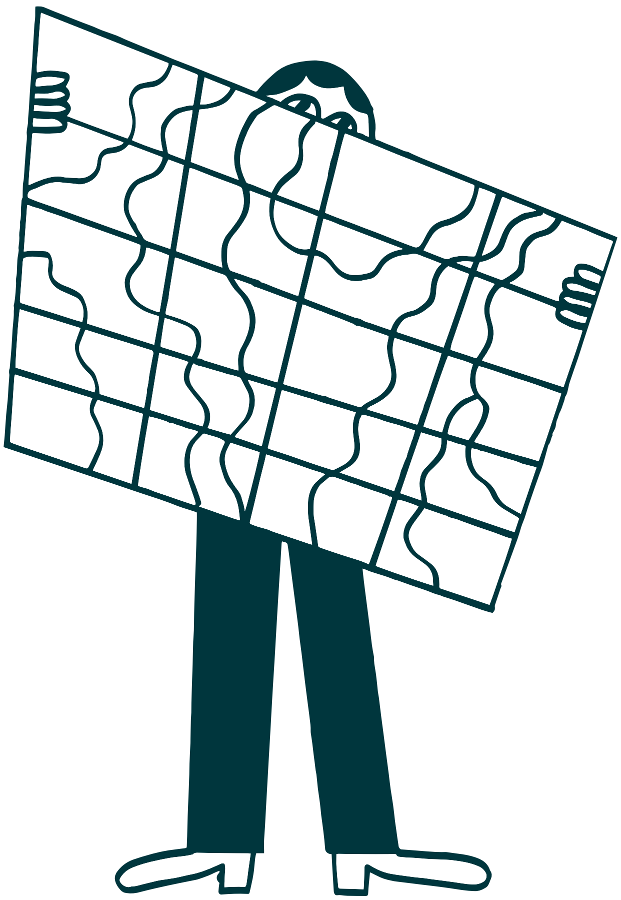
The number of concurrent chats an agent can successfully manage.

Managing escalation paths by channel



Some channels may require a different escalation path than others. Your own escalations paths are no doubt based on your own workflow and your particular needs, but here's a generalized escalation path that will help us explain how escalation might work for the different channels.

Triaging tickets

Triaging tickets is an escalation in that someone has evaluated the issue and decided how it should be routed rather than having an agent choosing it at random. Support requests received through Twitter (we refer to these as twickets) and Facebook posts are likely to be triaged since many of the requests are actually better handled by marketing, not support. Talk and chat support requests are not triaged of course because they are immediately responded to by agents who answer the phone or pick up the chat request.

Escalating live channel interactions to tickets

When it becomes necessary to escalate a support issue to an agent or team that handles the more technically challenging issues or when you want to make a public exchange private, the live interaction channels (chat, messaging, and talk) must first be converted into tickets. The conversation moves from synchronous (live) to asynchronous and email-based.

You could conceivably do live-transfers of talk and chat tickets, but the potential problem there is that the person receiving the transfer needs to come up to speed on the situation. In an asynchronous situation, they can take the time to read the ticket to get this information. But for talk, this would require either the customer or the original agent to explain the situation—the customer won't want to repeat themselves, and the agent might not repeat the situation exactly, which could frustrate the customer. For chat, the receiving agent would need to spend a little time reading the chat transcript (if that's available). A live transfer does make sense, especially for the talk channel, when the customer asks to speak to a manager, which does happen and should be dealt with immediately.

Escalating to other channels (channel switching)

Sometimes it makes sense, because it's better for the customer, to move a support interaction from one channel to another. A good example of this is a ticket that because of complexity or too much back and forth for whatever reason is better handled by just calling the customer and talking through the issue. This allows agents to cut through confusion and speed up resolution time. You don't need to set up an incoming voice channel to do this of course, but if you do have it set up, your outgoing phone calls can automatically be appended to the ticket, so there's a record of the conversation. Another example of streamlining issue resolution and reducing customer effort is to proactively reach out to customers using, for example, live chat. By enabling proactive support on your website, you can monitor your customers' behavior and provide help for those who are unsuccessfully attempting to use your self-service channel (your help center) to find an answer to their question. You can switch them to the live chat channel by popping up a chat with the offer of immediate assistance.

Measuring the success of your new channel

The point of introducing a new channel is to address a customer need and to create an efficiency for your support organization. After you've rolled out a new channel, you'll want to measure if both those goals were accomplished. Here are some ways that you can measure the success of your new channel.

Measure the CSAT of the new channel compared to your existing channels.

Doing so will help you to evaluate and ensure that you're delivering consistent quality in the new channel. You don't want CSAT to be lower than your other channels. It's not always a straight up comparison, however. Some channels have higher CSAT because customers prefer them (chat and talk for example, because they're immediate and lower effort) and some tend to have lower CSAT (Twitter for example, because that's where people tend to go when they want to publicly vent their frustration).

Measure agent throughput.

You can measure operational efficiency by looking at the average handle time or how many new tickets agents can service in the same period of time compared to your other channels.

Evaluate customer engagement.

Customer satisfaction surveys touch on this, but are you also hearing from more customers in the new channel than with the old ones? Is the new channel having a positive impact on conversion or retention rates?

Learn more about our omnichannel solutions