25 TIPS & TRICKS *for*

Smarter Customer Service

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Introduction

Customer experience has never been more important than it is today. It drives loyalty, advocacy, differentiation, and even revenue. Customer service organizations are in a unique position to be the customer experience engine, but they continue to be squeezed by "Do more with less." "Be more productive." "Your budget's cut."

In addition, your customers are more mobile, connected, and empowered by technology than ever before. In their personal lives, they engage seamlessly with their friends, family, and colleagues easily and instantly on mobile and digital channels. Why can't they engage with the companies they do business with as seamlessly or conversationally?

The most disruptive companies view customer service as a critical part of their customer's journey rather than a destination to be avoided. They don't make service hard to find--they make it convenient, conversational, and an integral part of the experience.

We created this ebook to help you elevate your customers' experience by delivering a personalized, connected experience across every channel with the tools and intelligence that are now available to every service organization. So we asked expert service members of our Success Community for their best tips and tricks on delivering next-generation customer service. From empowering agents to enabling a premier self-service experience, here are 25 tips that will allow you to transform every agent into a super agent and transform your service center from a transaction-based cost center into a Customer Experience-driving profit center.

KNOW YOUR CUSTOMERS

In the world of Customer Service, providing timely, accurate assistance is table stakes. Whether you are a B2B or B2C business, your customers, suppliers, partners--and every one else you do business with--are making an investment in your product or service. In return, they expect you to know who they are and what they want when they call, email, tweet, or message you. Knowing your customers means having a complete 360-degree view of them across your entire business--which products have they purchased previously and how often? Which marketing offers have they responded to? What have they browsed for on your website? What other issues have they contacted you about and on which channels?

Do customer insights come in the form of a quarterly focus group or an annual survey? By the time you are able to react, your customers' preferences may have already changed again. Are you able to take customer survey feedback and create a complete feedback loop with R&D or product supply that can be actioned upon quickly? Are you able to surface customer insights in real time to your agents to resolve a case more quickly or in a way that is going to deliver a better experience to your customer?

Intelligent tools such as the Service Cloud Lightning Console provide agents with a unified, 360-degree view of your customers and pushes insights like contextual knowledge articles, similar cases, and even data from back-end legacy systems to help them resolve issues faster across any channel from a single location. For managers, Service Wave Analytics surfaces deep customer and operational insights, providing them with the ability to adapt and scale their business operations as their customers' needs evolve and their business grows.

TIP #1

"Take the time to connect with customers. In today's connected world, you should know what products I use and who I am. Take the time to recognize that and not just treat me like a number."

Rachel Rogers
@rrogers09

TIP #2

"Know where your customer is. Know what the time zone is, the season, the weather etc. Know who your customer is – Google them. Know what the context of their problem is. Read their customer emails."

Jodie Miners
@jodiem

TIP #3

"Make sure all information is available and that it's tailored to the person looking at it, especially if it's a paid service. Information should be easy to find."

Cheryl Feldman
@cherfeldman

TIP #4

"Make everything as personalized as possible, so the customer feels like he or she has a dedicated agent each time."

Jean-Michel Mougeolle
@jmmougeolle

Imagine contacting a support agent, and he or she already knows who you are, the products you own, and all previous interactions you've had with the company – on any channel. You don't have to imagine it. Service Cloud puts the power of a 360-degree customer view at every agent's fingertips, making it easy to deliver this personalized, conversational service to every customer, every time.

Learn more about delivering deeper customer service insights with a 360-degree view of the customer: Download the free e-book.

A 360-DEGREE VIEW OF YOUR CUSTOMER
Deliver deeper customer service insights

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DEVELOP A CULTURE OF CARING

It's simple: When an entire company is committed to a superior customer experience, it will put their needs and expectations at the center of the business. But this extends beyond just caring about the customer; it also means caring about your agents who are on the front lines and interacting with customers all day, every day.
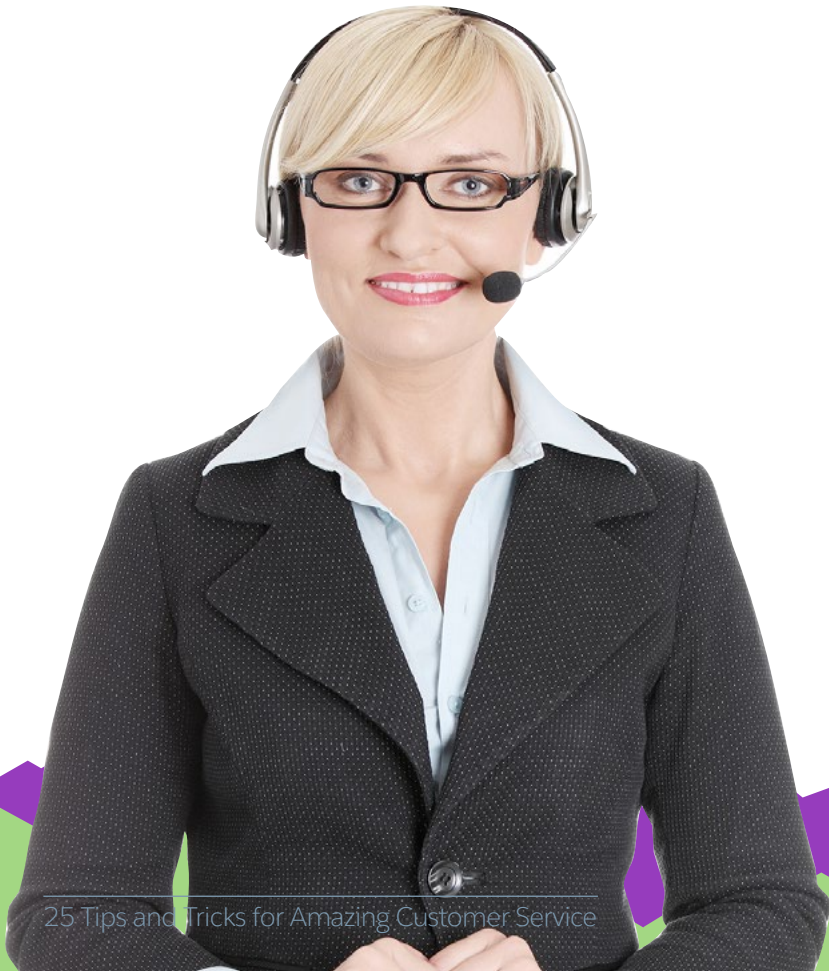
TIP #5

"Make sure your service teams are well-trained. Invest in your people as well as your technology."

Aiden Martin
@amartin_nl

TIP #6

"Quit treating support like an afterthought. It's a part of your sales cycle, and should not exist to exclusively upsell."

Amber Boaz
@amber9904

TIP #7

"Hire agents with a deep sense of empathy. There is nothing worse than help from an agent who seems to not care, not listen, and doesn't really want to help."

Kylee Durant
@KyleeDurant

A culture of caring is two fold: Caring about your customers – which means delivering an experience that meets their expectations – and caring about your agents as well, including their training and preparedness. Want to learn more about the four steps to incredible customer service? Check out this interactive infographic!

TIP #8

"Listen, listen, LISTEN! A customer's situation may not be cookie-cutter, so listening helps service agents determine the real problem. This saves time, as the clarifying statements/questions/discussion often take up the most time on a call/chat."

Kylee Durant
@KyleeDurant

TIP #9

"Measure what matters most. Does the number of case closures really identify excellence? Does it matter how long it is open for? Identify how you want to determine success from your customer's perspective, then design your metrics."

Brian Kwong
@kwongerific

TIP #10

"Own the issue. If you didn't ship something on time, admit it. If the wrong size was sent, apologize. Don't make it the customer's problem."

Nick Zinser
@nzinser

OPTIMIZE FOR EMPOWERMENT

Once a company has committed to keeping the customer experience at the core of the business, the next step in building an expectation-exceeding service experience is making sure the customer support team is empowered, productive, and prepared. According to our 2017 State of Service report, top service teams are 3.4x more likely than underperformers to say their service agents are completely empowered to make customers happy.

TIP
#11

"Prioritization is critical. It may sound difficult to prioritize while keeping customer satisfaction levels high; however, it can be done. Leverage interpersonal skills to demonstrate compassion, and even the person at the end of the list will be satisfied with your streamlined workflow."

Rachel Rogers
@rrogers09

TIP
#12

"Staying organized is key. Knowing where to find the answer is more important than trying to know all the answers off the top of your head."

Adam Marks
@adammarks1224

TIP #13

"If you don't have a knowledge base (even an internal one), push for it. Having a place where you can reference common issues will make life much easier for everyone."

Patrick Connelly
@aelst

TIP #14

"Make sure you have the right information at the right time based on the type of customer service request it is. Getting an immediate picture of the customer and the service request at the moment the customer calls or puts a request in allows you to deep-dive into particular areas of the customer's details."

Francis Pindar
@radnip

TIP #15

"Know your system interface inside and out. Find the quick actions/clicks and stay organized."

Nana Gregg
@nanahg3

TIP #16

"First-call resolution with proper information is best. If something needs to be escalated, make sure the escalated party can resolve it."

Cheryl Feldman
@cherfeldman

Connecting with customers is at the heart of conversational service. But even the most powerhouse agent comes across a tricky case that demands an answer, fast. When the clock is ticking, Salesforce gives agents the tools they need to keep the conversation going.

Service Cloud's Lightning Console automates tedious processes, and delivers the right information instantaneously. With knowledge articles, subject matter experts, and extensive customer profiles right at their fingertips, agents have what they need to deliver a complete, personalized answer to every customer inquiry, lightning fast.

HUMANIZE SELF-SERVICE

Superior service means providing a plethora of options for your customers to answer their own questions without picking up the phone or sending an email. Consider this: 81% of customers would prefer to self-serve before dealing with a service agent, according to a recent Harvard Business Review article. Ouch! But in the age of omnipresent search engines, this empowered mindset isn't all that surprising.

Self-service is a growing requirement for DIY-minded customers (and must be accessible from any device to satisfy today's hyper-mobile customers). With a self-service community, your customers can help themselves by accessing a rich library of knowledge-based articles, as well as ask questions directly to the community and collaborate with other customers to find the answer.

TIP #17

"Don't make using self-service a requirement to open a case. You can deflect more cases by offering them as an option without making looking at them a gate to getting to support."

Patrick Connelly
@aelst

TIP #18

"Make sure you have great search functionality in your self-service portal."

Geoff Flynn
@geoffreyflynn2

Tapping into this growing power of customer communities puts your business at the front of the pack. The seamless connection between Community Cloud and Service Cloud means that your community is never separate from your service department and agents are always a click away from stepping in and answering questions that the community can't answer on its own. Self-service options are a true win-win: Customers are empowered to answer their own questions (just as they'd prefer) and service agents are freed up to tackle the trickier cases.

TIP #19

"You can't just set up 'self-service' and expect it to be used. It will only be used if people find it beneficial, with quality content within it."

Francis Pindar
@radnip

TIP #20

"Make it easy and fast. Don't put a lot of burden on your customer. A big form asking for lots of information before a 'case' could be submitted is likely to be ignored. Having to click many times to find information will cause the query to be abandoned. Quick, easy, and simple rules the day."

Brian Kwong
@kwongerific

TIP #21

"Remember that to the general public and to your customers, your company is one entity. If you try to subdivide self-service experiences by division or department, you're putting your governance structure ahead of customer interaction."

Nick Zinser
@nzinser

MAKE IT EASY

The 2017 State of Service Report asserts that customers expending moderate-to-high effort to resolve an issue is one of the top three customer-service challenges. This can take many forms: not being able to find the information he or she needs online, being passed around on the phone to numerous different agents, or being frustrated by a lack of mobile service capabilities.

Service Cloud takes conversational service wherever your customers are with LiveMessage and SOS for apps 1-to-1 mobile service. Your agents can keep the conversation going anywhere using instant 2-way messaging and in-app support that includes one-to-one support with live video and screen annotation.
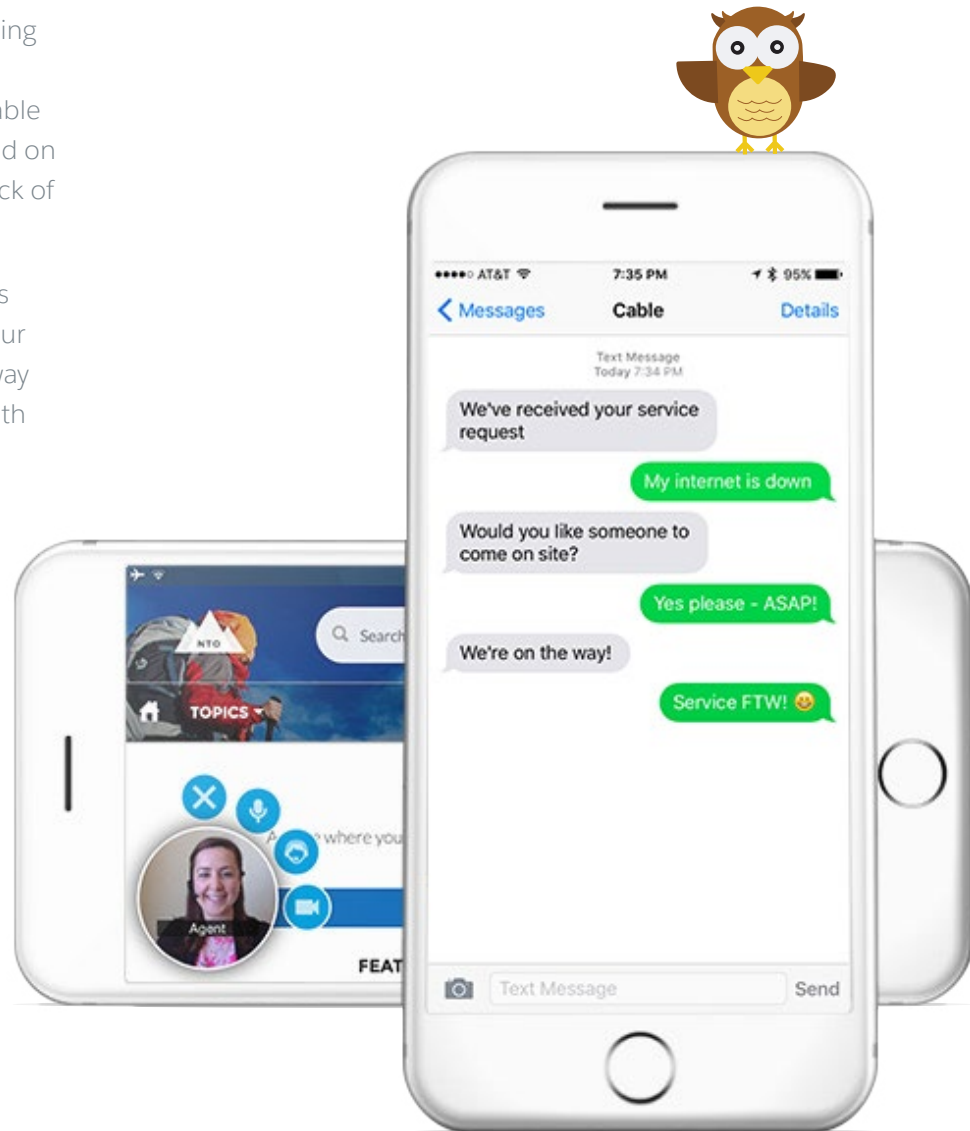
TIP #22

"Make it easy to find [company info] from Google. Including the metadata for knowledge graph entries is a nice touch."

TIP #23

"Keep it simple! If I can't get what I need in less than five minutes, I will give up."

Rachel Rogers
@rrogers09

TIP #24

"Make it easy, efficient, positive. You can develop 'fun' ways for customers to use self-service portals or websites."

Kylee Durant
@KyleeDurant

TIP #25

"Make it easy from wherever customers are – any page or any spot in an article – to switch from self-service to logging a service request. Don't make people navigate through three screens from where they are, to logging a case."

Geoff Flynn
@geoffreyflynn2

At the end of the day, you could provide ultra-personalized, smart service to your customers. But if it isn't easy for the customer to seek out and engage with that service, your efforts are null and void. Ease of use means that your agents, self-service options, and service analytics are all working in harmony to provide a superior experience that will leave your customers singing your praises.

CONCLUSION

Your customers expect a service experience that's as instant and as personalized, as a conversation. Support teams are excelling by meeting the customers where they are, empowering their agents with the right tools to boost productivity, and enabling customers with robust self-service options. By centralizing the business around the customer, your company will succeed in delivering the exceptional service that separates you from competitors and transforms customers into brand advocates.

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THE CUSTOMER SUCCESS PLATFORM

SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS IoT