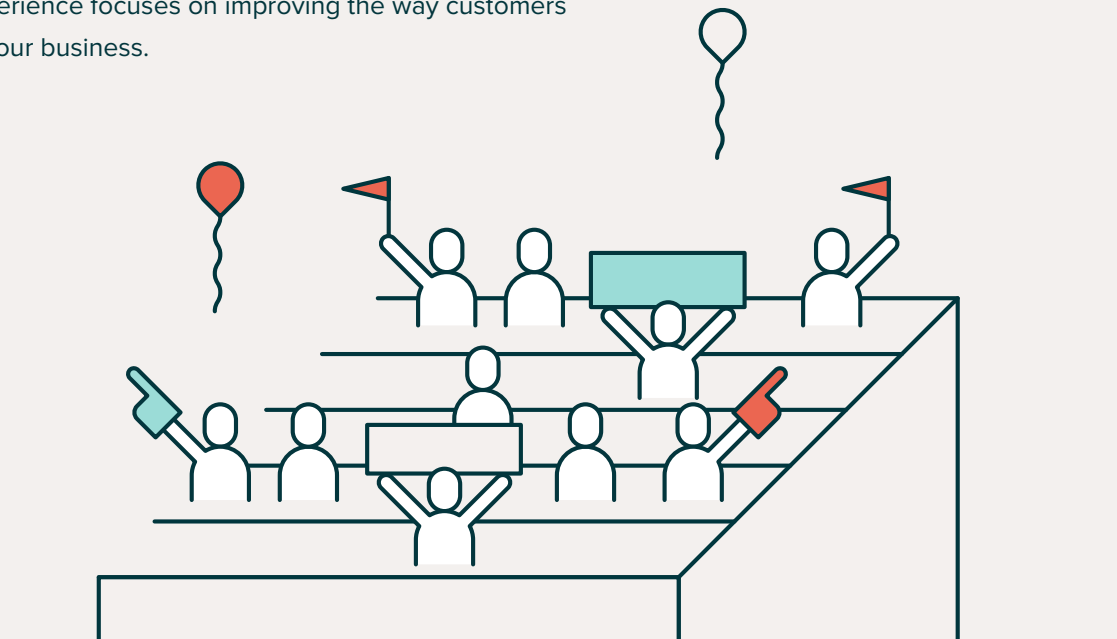


# Customer experience

# If you provide a negative experience to a customer, not only are they more likely to tell their friends and colleagues, they may abandon you for a competitor.

The good news is the opposite is also true: When you provide positive experiences, customers will choose your business and tell others, time after time.

Customer experience focuses on improving the way customers interact with your business.



# High growth

As a high-growth support organization, you have a unique set of challenges and opportunities. Clearly, something is working because you're in high-growth mode. The support you provide resonates with your customers. But the demands are on the rise as you're increasingly asked to do more with less. This strains your support team and threatens your ability to not only maintain the same level of quality, but improve it.

Yes, this is a difficult challenge, but it's not impossible. Zendesk has compiled real-world support strategies that have helped companies like yours, with everything from hiring and training agents to creating best-in-class support strategies to providing great customer experiences.

We designed this guide with the high-growth support team in mind to help you take your support to the next level.



# Customer experience brand

For many years, companies modeled their customer experience around a funnel, which assumed a beginning, middle, and end. Today, it's far more complicated, with overlapping customer journeys and unpredictable behaviors. The experience is more nebulous, and customers expect consistency on their terms, at any time. Keeping up is difficult for companies, which has decreased the quality of many customer experiences.

## COMPANIES AREN'T GETTING THE MESSAGE

According to Forrester's 2015 U.S. CX Index survey, customer experience scores were virtually unchanged for 69% of brands over 12 months, and only seven brand scores improved.

- Brand scores dropped for 15 out of 18 industries, compared to Forrester's previous customer experience report.
- Only 15% of brands received "good" scores—a drop from 26% the previous year.
- "Excellent" scores remain scarce, representing only 1% of brands.

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**"66% of B2B and 52% of B2C customers stopped buying from a brand after a bad customer service interaction."**

Source

## HOW TO OPTIMIZE YOUR CUSTOMER EXPERIENCE

Here are several techniques for high-growth customer support teams:



### **Be empathetic.**

Take on the point of view of your customers. Provide experiences that are best for them, not your company. Personalize emails and respond quickly to social media posts so your customers feel like they're communicating with a person.



### **Embrace your uniqueness.**

When you stand out to your customers, they are more likely to remember your brand and recommend it. Always consider—and implement—new ways of showing that your products are different from the rest.



### **Focus on agent experience, too.**

Close the feedback loop from customers and share that feedback with agents. Conduct quality assurance checks on agent calls and tickets to ensure they're meeting the customer branding experience. Use ticket routing best practices so customers don't have to speak to more than one agent (avoid the repeat game). And take the time to celebrate success with the organization.



### **Stay current.**

Know what social factors influence your audience—and be ready to quickly adapt to changes. It can be difficult to keep up with the constant influx of social platforms and programs, but do it anyway. Use social media to gain insights into future needs. Understand customer behaviors and patterns along their journey.



### **Don't sell; communicate.**

Replace corporate jargon with a human voice, and use that voice to tell your brand's story.

# Customer satisfaction and Net Promoter Score® reporting

It's impossible to improve the customer experience without listening to your customers. But it's not enough to ask them ad hoc. Instead, businesses must take a programmatic approach that is measurable, repeatable, and leads to actionable data.

Although there are several ways to collect customer feedback, two of the most widely adopted approaches are:

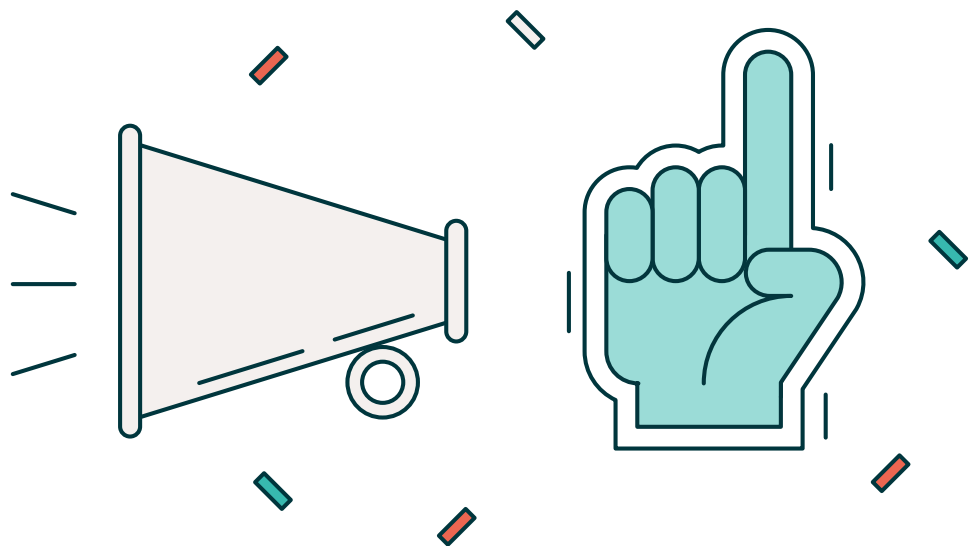
1. **Customer satisfaction (CSAT):**

A measure of short-term customer happiness collected via a simple survey sent to customers shortly after their interaction with a company

2. **Net Promoter Score® (NPS):**

A predictor of long-term customer happiness collected via a survey that asks: "How likely are you to recommend my company to someone you know?"

Although similar, these surveys have two different applications.



## CSAT

CSAT is a metric that measures a customer's satisfaction with the service received. Measuring CSAT helps track the effect of new initiatives on customer satisfaction. CSAT surveys can be automatically sent once a customer meets a predefined set of conditions, such as after an agent closes a ticket. The surveys should be short, direct, and should ask the customer if they were satisfied with the interaction.

How to improve CSAT surveys:

- **Be consistent.**  
Ensure that your customers receive surveys at the same time.
- **Simplify your survey.**  
Ask clear, simple questions.
- **Make a lasting impression.**  
Train your agents to properly close calls and tickets.
- **Ask for more feedback.**  
When possible, ask customers to provide more details about their interaction.
- **Act on feedback.**  
Always close the feedback loop.

## THE PROS AND CONS OF CSAT

No single customer survey will provide input for all your feedback needs.

### Pros

- Helps measure correlation of changes in trainings or procedures on customer satisfaction
- Allows for customized survey questions that let you delve into different strengths and weaknesses and focus on finding the best ways to meet their needs

### Cons

- Fails to consider mildly satisfied or dissatisfied customers
- Limits its scope to a single interaction; the weakest predictor of future behavior



## NPS

NPS is a metric that predicts customer purchase and referral behavior. NPS is based on how your customers respond to a single survey question: “On a scale of 0–10, how likely are you to recommend my company to someone you know?”

Based on how customers respond, they are categorized into three groups:

- **Detractors (0–6)** are disloyal customers who complain about your business and share negative opinions.
- **Passives (7–8)** are customers who are ambivalent about your business and don’t usually impact your business.
- **Promoters (9–10)** are loyal customers who are enthusiastic about your business and share positive opinions.

A simple formula aggregates all your survey data into an overall NPS score.

A positive NPS score has been linked to long-term business growth. You can compare your score to other companies in the same industry to understand the overall health of your business. You can also use your survey results to decrease the number of detractors and increase the number of promoters.

## Text analysis

One of the most valuable aspects of NPS is the inclusion of open-ended questions. This allows companies to collect contextual information via anecdotes from the customer, which can be used in conjunction with the rating they’ve provided. Doing so allows you to understand:

- Why detractors (customers who gave the rating 0–6) had a bad experience
- What hurdles prevented passives (customers who gave the rating 7–8) from becoming promoters
- Exactly why promoters (customers who gave the rating 9–10) love your company

## MISCONCEPTIONS ABOUT NPS

**Myth:** NPS replaces CSAT surveys.

**Reality:** CSAT measures transactional satisfaction and NPS focuses on the long term.

**Myth:** You should only send NPS surveys to happy customers.

**Reality:** NPS identifies the following customers: those who won’t recommend your company, those who feel indifferent, and those who are happy to spread the word.

**Myth:** You should send NPS surveys after a specific event.

**Reality:** Sending NPS surveys at a regular cadence is the best way to remove biases resulting from certain events.



# 24/7 vs. 24/5

Although we'd all love to be able to provide uninterrupted support to our customers, it's not always feasible. Thoughtful decisions need to be made to solve this issue, and there are several important factors to consider:

- What channels do you support and what's the primary channel?
- Do you have visibility into your contact traffic by channel during non-business hours?
- Can you segment your traffic based on after-hours activity?
- When do your customers want to contact you?
- Are your customers individuals or companies?
- Is your customer base spread across multiple time zones?
- Are you offering global support? If so, what time zones are you supporting?

Understanding these factors will give you insight into when you should staff support agents, and when it's acceptable to provide customers with other options, such as self service.

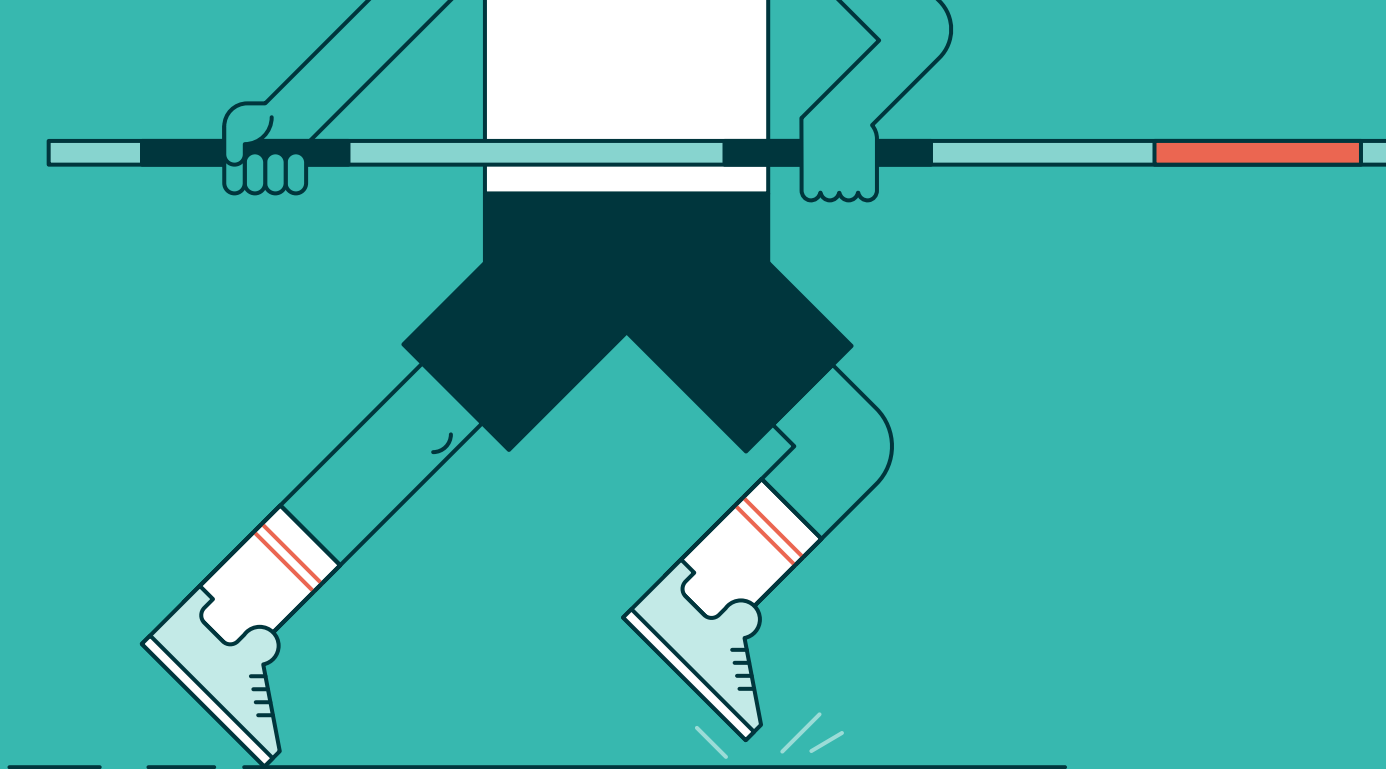
## **How to determine business hours**

Don't guess. To best understand when your customers need support, use data from the following sources:

- Web traffic
- Email volume after hours
- Customer feedback

# Key takeaways

- 1** Many companies understand that the customer experience is important. But far too few are doing anything about it. Instead of building experiences based on what's best, listen to customers and monitor their interactions with your company. Then use what you find to create great experiences.
- 2** Customer satisfaction surveys are a great tool for determining the short-term happiness of customers. When used correctly, they let you know which types of interactions are working and what needs improvement.
- 3** Since many support organizations can't help customers at every hour of the day, they should use data to determine the most effective times to staff agents.



# Achieving scale

As a support team looking to achieve scale, you have a unique set of challenges and opportunities. Your organization is capable of delivering quality support to an ever-increasing number of customers, and you know you can meet those needs. As your company moves to the next level, a deluge of customer interactions is just around the corner. The way your support structure and strategies currently stand, there is no way to meet future demand without finding a way to scale and maintain a high level of quality.

Yes, this is a difficult challenge, but it's not impossible. Zendesk has compiled real-world support strategies that have helped companies like yours, everything from building career paths of agents to escalating ticket management to benchmarking against competitors.

We designed this guide with the scale-seeking support team in mind to help you take your support to the next level.

# Benchmarking vs. competitors

There are many ways to measure the health of your customer service organization. Operational metrics and customer surveys provide a ton of context and let you know what needs improvement. But if you're not benchmarking yourself against your competitors, you're only getting an insular picture of things.

Doing so encourages everyone to strive for perfection and promotes innovative thinking. It also helps you get a better understanding of your industry, and it's the most effective tool for identifying best-in-class business practices with a view to their adoption. Furthermore, benchmarking can:

- Expose areas that need improvement
- Pinpoint areas for cost reduction
- Assess performance objectively
- Test the success of your improvement initiatives
- Get a base line for your support to your vertical and industry best practices

## BEST PRACTICES

Benchmarking takes more than a casual, anecdotal look at the competition. It requires a well-thought-out strategy.



### **Choose an appropriate peer group.**

Look at factors like geography, scope, scale, complexity of issues, and industry.



### **Start early.**

Benchmarking early on will transition you from reactive to strategic.



### **Don't try to do too much.**

Limit the benchmarking scope to something that can be finished within 90 days. Measurable results are mandatory to ensure its continued success.



### **Look outside your industry.**

Some of the most dramatic learning comes from companies who operate outside of their industry. Another industry might address the same problem in a completely different way.



### **Focus on improving operations.**

Statistics cannot be improved, but the operations or processes that those statistics relate to can.



### **Keep it simple.**

Don't try to benchmark or study too many factors at once.

Visit the [Zendesk Benchmark](#) to see how you compare to your peers.

# Customer segmentation

Different customers have different needs, and meeting those needs often requires specific approaches. In addition to the customers' needs, your company might choose to interact with some customers in different ways. Maybe you want to surface self-service options to freemium users, while escalating tickets from enterprise users.

This is a great strategy for companies looking to achieve scale. But before you begin, first define your customer segments.

## SEGMENTING AN EXISTING CUSTOMER BASE

As with most tactics, each company will have to choose segments based on their own needs and the realities of their existing customer base. Here are several common customer segments to get you thinking about what makes the most sense for your company.

1. **Geography:** Factor for different time zones and language needs.
2. **Industry:** Serve multiple industries, each with their own SLAs and expectations.
3. **Product class:** Route customers of a new product to a specific support team.
4. **Product usage:** Provide advanced support to high-usage customers when necessary.
5. **Organization size:** Consider the differing needs and support levels of every company.
6. **Revenue:** Consider automatically escalating VIP customers.

## USING CUSTOMER SEGMENTS

Segment your users by creating customer lists for the following:



### Entitlements

For each plan type you offer, based on a custom field for the subscription type or plan



### Online retailers

According to their purchase history or preferences, based on custom fields



### E-commerce

Based on their subscription start date or trial expiration date



### Gaming companies

To identify big spenders and active users, based on the customer's online activity

# Business process outsourcing (BPO) strategy

BPO involves outsourcing a specific function or operation to a third party. Smaller companies may not have the need to outsource or the resources. But companies seeking to achieve scale can use it to maintain service standards and meet their growing support demands.

## BPO OPTIONS

When developing a BPO strategy, consider the different options available.



### Onshore

Representatives that reside in the same country as your market



### Nearshore

Resource operating in a foreign country within the same hemisphere as your customers



### Offshore

Offshore-based call centers with lower labor costs



### Virtual or home-based

Agents cover equipment costs in exchange for work-from-home flexibility

## WHY OUTSOURCE?

- Access best-in-class business processes
- Increase or decrease staffing quickly
- See less overhead on support staff
- Harness leading technologies
- Get faster time to market
- Offer global support
- Increase efficiencies
- Enhance capabilities
- Elevate service
- Expand language support
- Enrich customer relations
- Improve supplier relations
- Free up management time
- Decrease operating costs

## WHAT IF BPO ISN'T FOR YOU?

BPO doesn't make sense for every business. Some have tried it and found certain negative side effects and challenges, such as:

- Decreased customer satisfaction
- Linguistic barriers
- Less control over business functions
- Lack of company knowledge
- Divided agent focus
- Lack of collaboration and communication between agents and departments
- Hidden costs
- Security and privacy concerns

If this is the case, there are other options to help scale support. One of the best ways to do this is limit agent touches or the number of agents required to solve a ticket. To achieve this, here are some tactics:



### Business rules

Triggers and macros can be set up to escalate or route tickets to the right agent the first time, and automatically reply to simple tickets with prewritten responses.



### High-level journey-mapping sessions

Document the customer experience, then take on the perspective of the customer to build experiences based on their behavior. Using the techniques above, you can create a journey that lets the customer have an efficient company interaction. Ultimately, this will lead to fewer tickets and agent touches.



### Help center/self service

Providing robust self-service options, and surfacing those options to customers, helps them solve their issues with little to no help from agents.



### Ticket forms

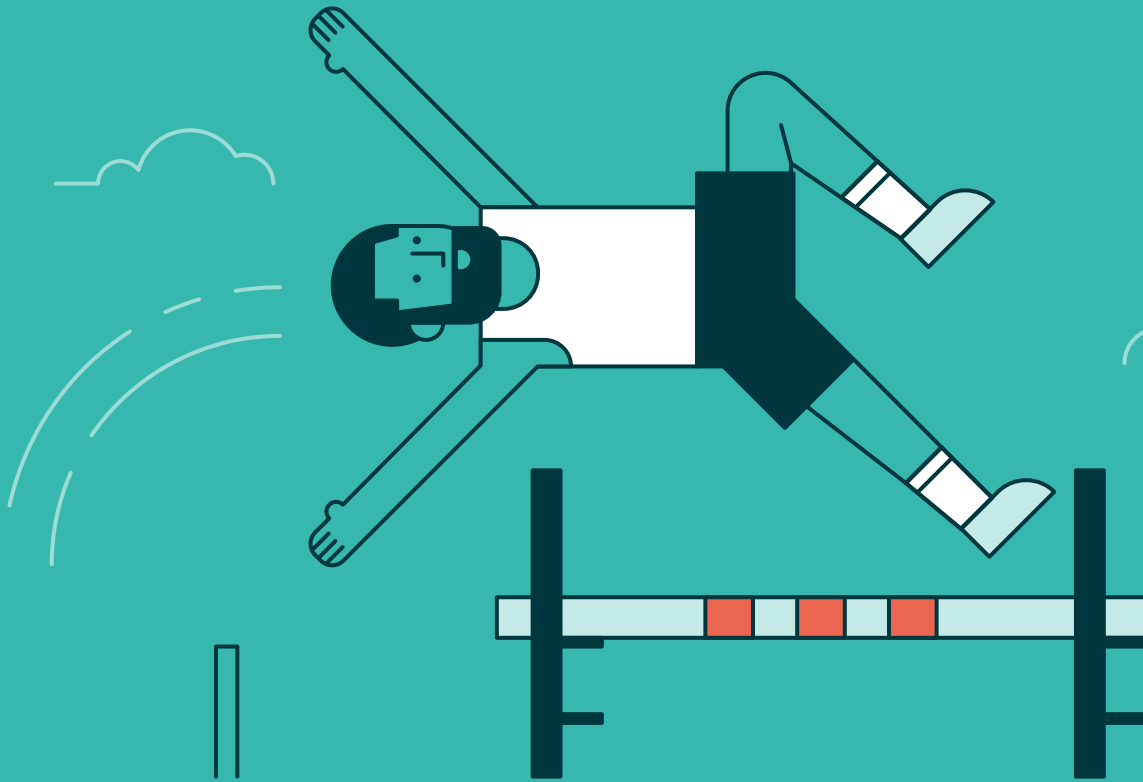
Prebuilt ticket forms increase the likelihood that customers will include more relevant information required to solve a ticket.





# Key takeaways

- 1** It's easy to get caught in the bubble of your own support metrics. That's why it's vital that support organizations benchmark themselves against competitors—and companies in different industries—to ensure that they always maintain a high standard of support.
- 2** Different customers have different needs and expectations. Segmentation is an efficient way to organize customers into segments to provide tailored support for each segment.
- 3** When done properly, outsourcing support functions can help you scale support without sacrificing quality, provide customer service in new regions, and decrease operational costs.



# Driving efficiency

As a support organization looking for efficiencies, you have a unique set of challenges and opportunities. Your organization has effectively overcome the challenges that typically plague less mature support organizations. Today, you have a robust team with specialized roles that provides high-quality support.

Even though you're experiencing great success, you can't shake a nagging feeling that things could be better. Maybe support provided from a newly opened international office isn't performing as well as you'd like, or change management still feels like it did during the startup days. As your support structure and

strategies currently stand, you know you can't rest on past successes. You must find a way to improve even further.

Yes, this is a difficult challenge, but it's not impossible. Zendesk has compiled real-world support strategies that have helped companies like yours, with everything from providing multi-product support to using data to forecast different support scenarios.

We designed this guide with the efficiency-seeking support team in mind to help you take customer service to the next level.

# Multi-channel support

It's likely that you're already providing support via multiple channels. Email and voice are typically the most popular, but chat, social media, and even SMS messaging are quickly growing in popularity.

One important question that every company looking to drive efficiency should ask is: "Are we providing the best possible support across all our channels?"

## THE CUSTOMER POINT OF VIEW

The first thing you want to do is see things through the eyes of your customer. For instance, you might view each channel as a separate entity:

- Phone is available during the day and customers can leave a message at night.
- Email, help desk, and social media can collect inquiries 24/7, but they're only answered when someone is in the office.

Customer service is available at different times and channels, but your customers might not see it that way.

To them, support should always be available. When they can access a website, view a Facebook page, or dial phone number, they expect a reply. Customers think with a multi-channel mindset, but they just want it to be easy to get a quick answer to their question.

## KNOW WHERE AND HOW TO INVEST

Of course, you can't support all channels with 24/7 agents. Instead, you need to make intelligent decisions about where to invest. Ask yourself the following questions:

- Which channels are the most efficient for our organization? Keep in mind that different channels offer different benefits, and our customer demographics may favor one channel over another.
- How can we foster meaningful customer relationships across multiple channels?
- What's the right number of channels to support? Do we really need that many?
- How can we decide which channels are the best to offer?
- How should we allocate agents? Are they dedicated to a single channel or blended across a few? How can we forecast growth and scale for demand by channel?
- How can we ensure that the customer experience is consistent?

## OPTIMIZE MULTI-CHANNEL SUPPORT

Armed with this knowledge, you can take steps to optimize your support channels.

First, use a customer service tool that unifies support requests from every channel. Do this by creating tickets in a single platform and a seamless, consistent experience, regardless of which channel your customers use to contact the company.

Effective multi-channel support includes:

- Unified tools and processes
- Cross-channel communication (e.g., from email to phone, or social media to email)
- A strategy for monitoring volume and engagement
- At least one live channel, such as voice or chat

The moral of the story is this: If you care about the customer experience, you need to find new ways to interact with customers, identify best practices, and update your strategies accordingly.

[Learn more about providing multi-channel support.](#)

# Dedicated subject-matter experts

As discussed in the multi-product support section, organizations that are trying to drive efficiency might need to invest in specialists, or employees with a deep knowledge of a specific product or technology.

A subject-matter expert (SME), or domain expert, is an authority in a particular area or topic.

In many support organizations, the team leader is used as the first step in an agent's career progression. It is often a low-risk training ground for potential supervisors or managers. SMEs are a valuable information resource and provide a wealth of knowledge and support to agents.

## WHAT DOES AN SME DO?

- Provides assistance and up-to-date information on specialty topics, policies, processes, quality assurance, marketing programs, or general contact center issues
- Liaises with the functional area from which they obtained their expertise and provides feedback on new processes, programs, and updates
- Updates and creates knowledge content
- Creates an operating environment where members can build and share expertise
- Frees supervisors from having to attend meetings so they can spend more time in the call center assisting and coaching agents
- Demonstrates a superior level of job knowledge and service excellence (as a low cost, high benefit form of recognition)

## ENABLING SMEs

Encourage your SMEs to focus on knowledge discovery instead of knowledge presentation. For example, an SME can ask thought-provoking questions or provide online scenarios that help learners explore a situation and discover how their actions lead to consequences. When a learner can find the information on their own, they are more likely to remember and recall it in a moment of need.

A learner doesn't need to be an expert in a topic. Instead, they need to be able to carry out a task or expand their knowledge base within a limited scope. SMEs can help with this. Learners also don't have a great deal of time to fully engage in all topics, which means that SMEs should focus on what's important. The SME has a vast amount of experience in the field, but they need to bear in mind that learners only need the key takeaways to achieve their goals.

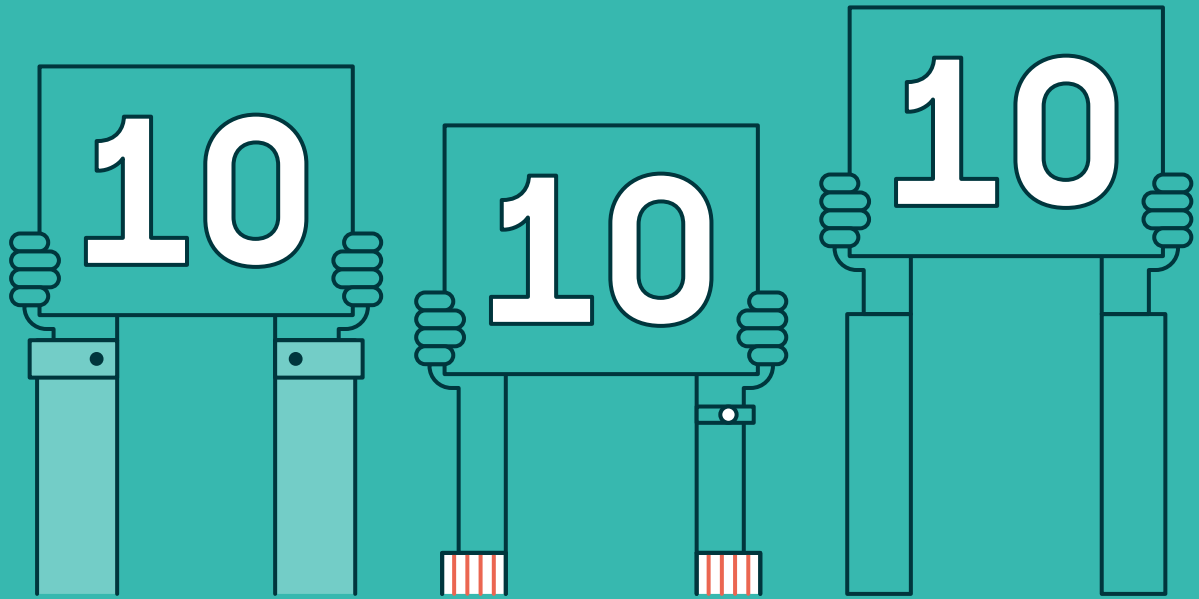
### Here are three tips to help SMEs work with others and share their knowledge.

- Be clear about expectations and objectives. Ensure the SME understands who they are helping and why.
- Make sure they make learners work for the information. It's not enough that they can repeat something they've memorized; they need to understand and internalize the information.
- Keep in mind that learners do not need to become SMEs. They just need a working understanding of the subject matter.



# Key takeaways

- 1** Customer expectation drives multi-channel support. Listen to your customers to understand how they want to be supported on each channel. Then optimize each channel to meet those expectations.
- 2** Subject-matter experts are essential for not only providing specialized support to customers, but helping others in the company—from product to marketing—maintain a working understanding of complex concepts and strategies.



# Conclusion

The process of improving customer service never ends, so this guide is meant to be a big step in the right direction. Even if you implement and master every tip and strategy, improve customer satisfaction and loyalty, and hire and train the best possible agents, there's always plenty of room for improvement.

We hope this guide has helped you understand that great customer service is possible.

Assess your Customer Service organization's maturity at [assessment.zendesk.com](https://assessment.zendesk.com)