10 Steps to Empowering
Customer Service Agents
The new path to great customer service

salesforce

Organizations known for providing excellent customer experiences have at least one thing in common: they understand that the agents who are on the frontlines of interacting with customers every day are by far the most important factor in delivering the kind of stellar customer service that people talk (and tweet) about; they have an opportunity to create lifelong customers.

Yet many companies don't treat customer support agents as the crucial brand ambassadors that they truly are, and as a result, agent turnover increases. Agent turnover costs companies roughly 50 percent of an agent's full salary: 10 percent is spent on recruiting a new agent, 30 percent for training, and 10 percent for onboarding them.

Four key missteps:

1. Lack of training

2. Lack of progress towards a long-term career

3. Lack of recognition

4. Lack of empowerment

Global organizations of all sizes understand the importance of customer loyalty – especially from a revenue perspective. Increasing your customer retention by 5 percent can help boost profits by as much as 85 percent. But business leaders often talk about gaining more revenue per customer. So companies start focusing on cross-selling and up-selling to get the customer to buy a second line of business and increase their 'share of wallet' from customers.

" In fact, a 5% increase in customer retention can increase your profits by as little as 25% and as much as 85%. "

Introduction

What these business leaders might not understand is that the path to earning more revenue per customer must be earned by delivering a reliable, memorable customer experience. In other words playing the long game for customer loyalty and not focusing on short-term profits. One of the keys to unlocking the incredible opportunities that customer loyalty provides is empowered, informed, happy customer support agents. Not only do empowered

agents feel more invested in your company, but their ability to impact customer loyalty is the single most under appreciated sources of new revenue for businesses today.

How can businesses stop the agent turnover machine in its tracks and build a customer support department that empowers each and every agent? In this e-book you'll learn seven key steps.

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STEP 1:

Get a Seat in the C-Suite

More companies are developing roles like a Customer Experience Officer, which is helping companies understand the power of an empowered agent addressing a customer issue at key points in the customer journey. The CXO's role is to be the customer advocate – to tell their stories and convince other executives, like the CIO or CFO, that the end-to-end customer experience is a worthy investment. These individuals serve as top executives with the authority to design, orchestrate, and improve customer experiences across the increasingly complex range of customer interactions.
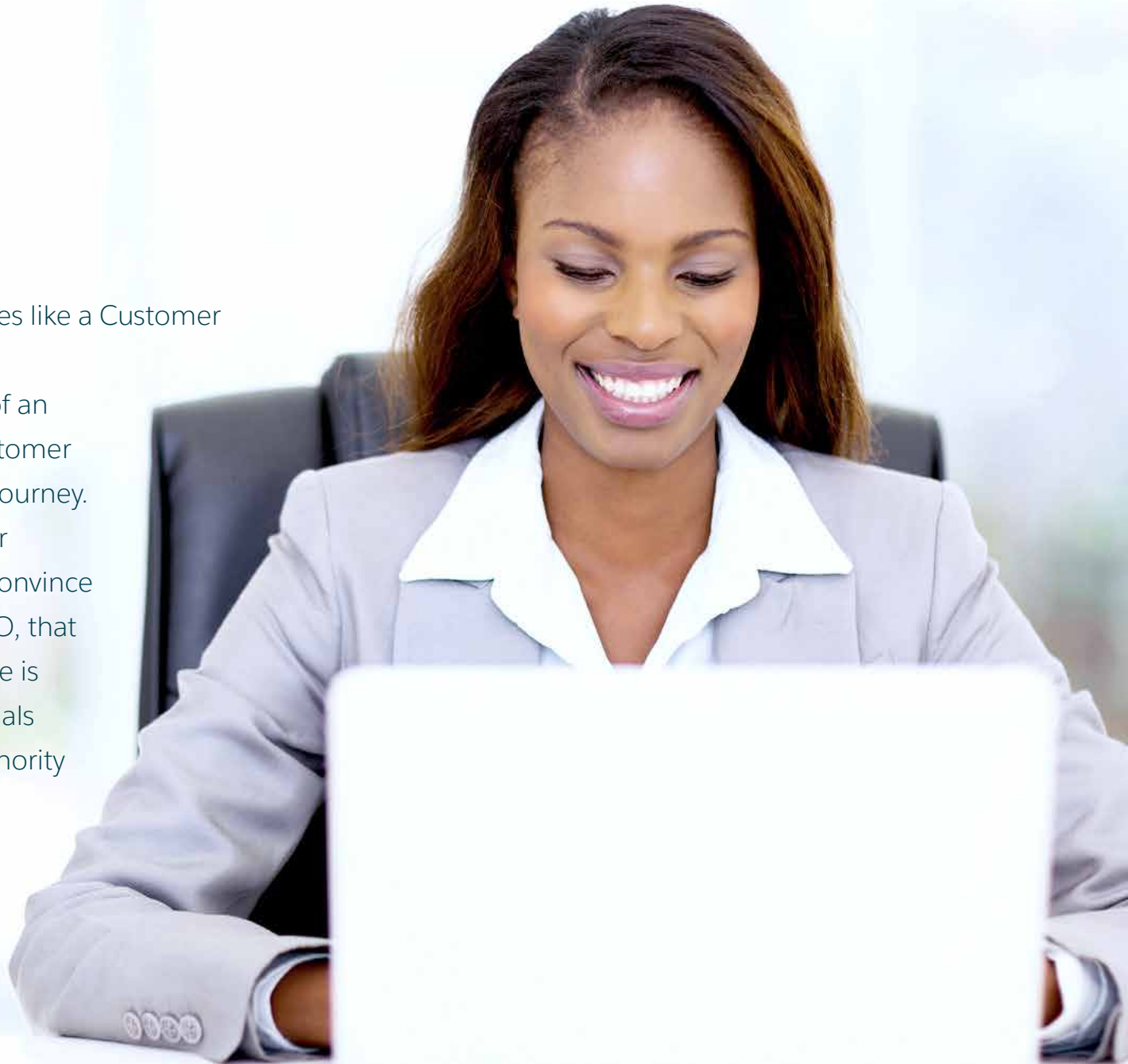
If your executive offsites are missing representation from the customer service department, that's a big mistake, particularly considering customer service has overtaken price and product as the key brand differentiator.

The CXO is about much more than fixing problems – the role is about accelerating growth by reorganizing around the customer and finding meaningful differentiators for the business beyond just price and product.
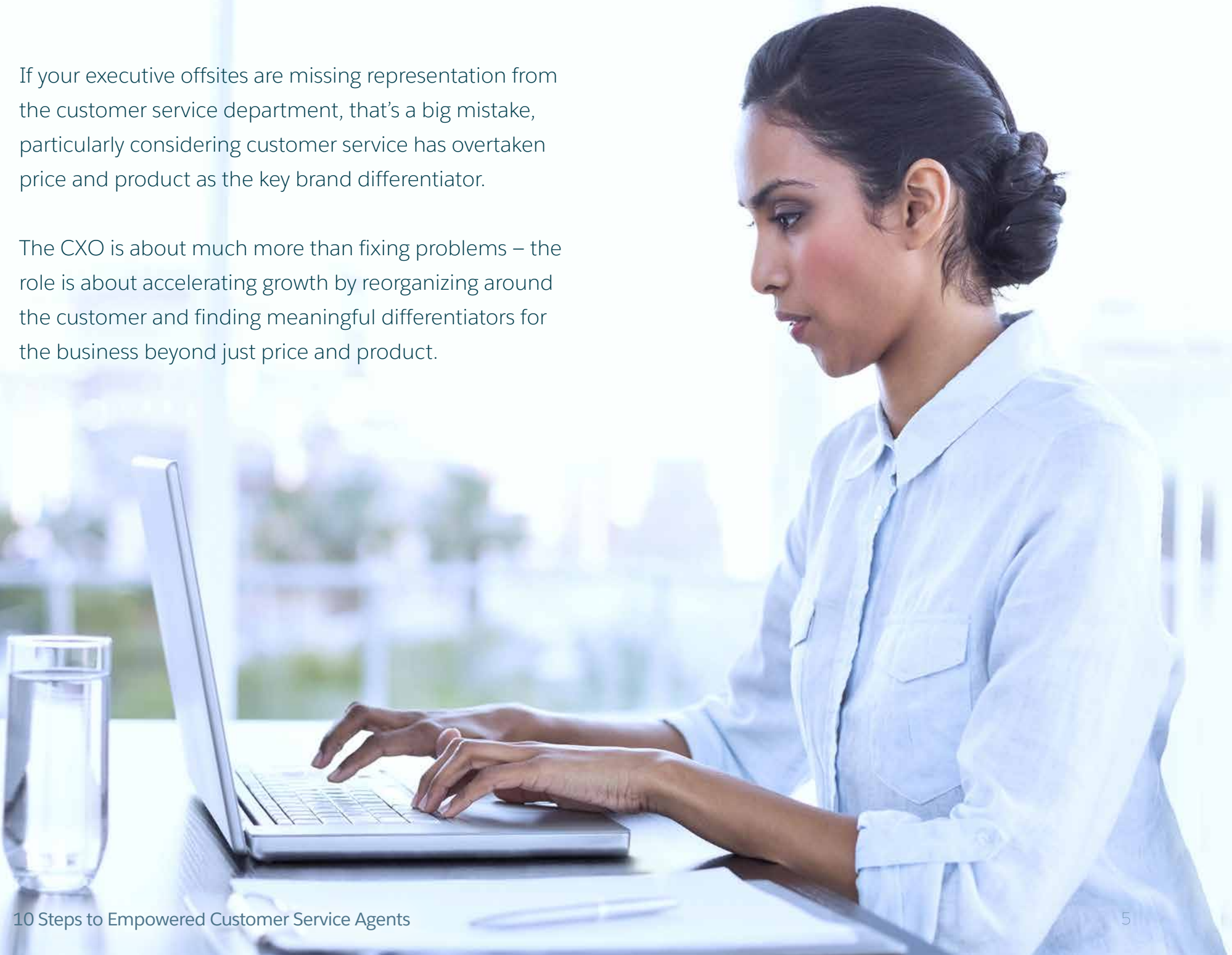
STEP 2:

Get Serious With Your CRM

By under-funding your customer service operation you are leaving your company highly vulnerable to customer churn. Customers are using a litany of channels to engage with your business, including social media, online forums, chat, mobile devices, and classic 800-numbers. Businesses are often so eager to add new channels and stay in line with customer expectations that they offer new channels before they're actually equipped to serve those channels.

As a result, the customer service department becomes a patchwork of systems – one system for answering social media complaints, another for phone inquiries, and a third for mobile chat.

This leaves ample room for mistakes and agents are left trying to navigate these different systems rather than focusing on what truly matters: providing the appropriate service to the customer at key points of the customer journey. When agents make mistakes due to siloed systems, customers fall through the cracks – that's the worst possible scenario. With a plethora of choices at their fingertips, customers who feel ignored will surely take their business elsewhere.

STEP 3:

Have One CRM to Rule All Departments

It's not just your customer service department that should be aligned around one CRM system –the entire business should be, too. Unfortunately, many businesses have tackled optimizing their sales processes with cloud software (sales force automation) at one point in time and their customer support solutions at a different time. This results in silos that create a disconnected customer experience because businesses lack the 360-degree view they need of each individual customer.

The worst case scenario is when a customer has to contact separate departments in order to address various problems in their customer cycle – there's a billing department, a department for product questions, and a separate department for new customer onboarding. Unfortunately, this is the reality for many companies: customers demand a seamless experience and will leave if that's not what they get.

No matter who the customer is talking to in the organization, they expect the agent will have the right background information to solve their problem the first time – no follow-up calls needed.

That means agents need a complete view of the customer across all departments and are prepared to answer these key questions:

- Where is this customer on their journey with the company?

- How long have they been a customer?

- What have their past service experiences been?

- What products do they own?

- What products might be a good match for cross-selling and up-selling?

Today's connected customers don't care how your infrastructure is set up, or whether your sales and service teams use different systems. All that matters is a single, seamless, and pain-free customer experience that's relevant to their needs. But siloed sales and service systems are not equipped to deliver this connected experience.
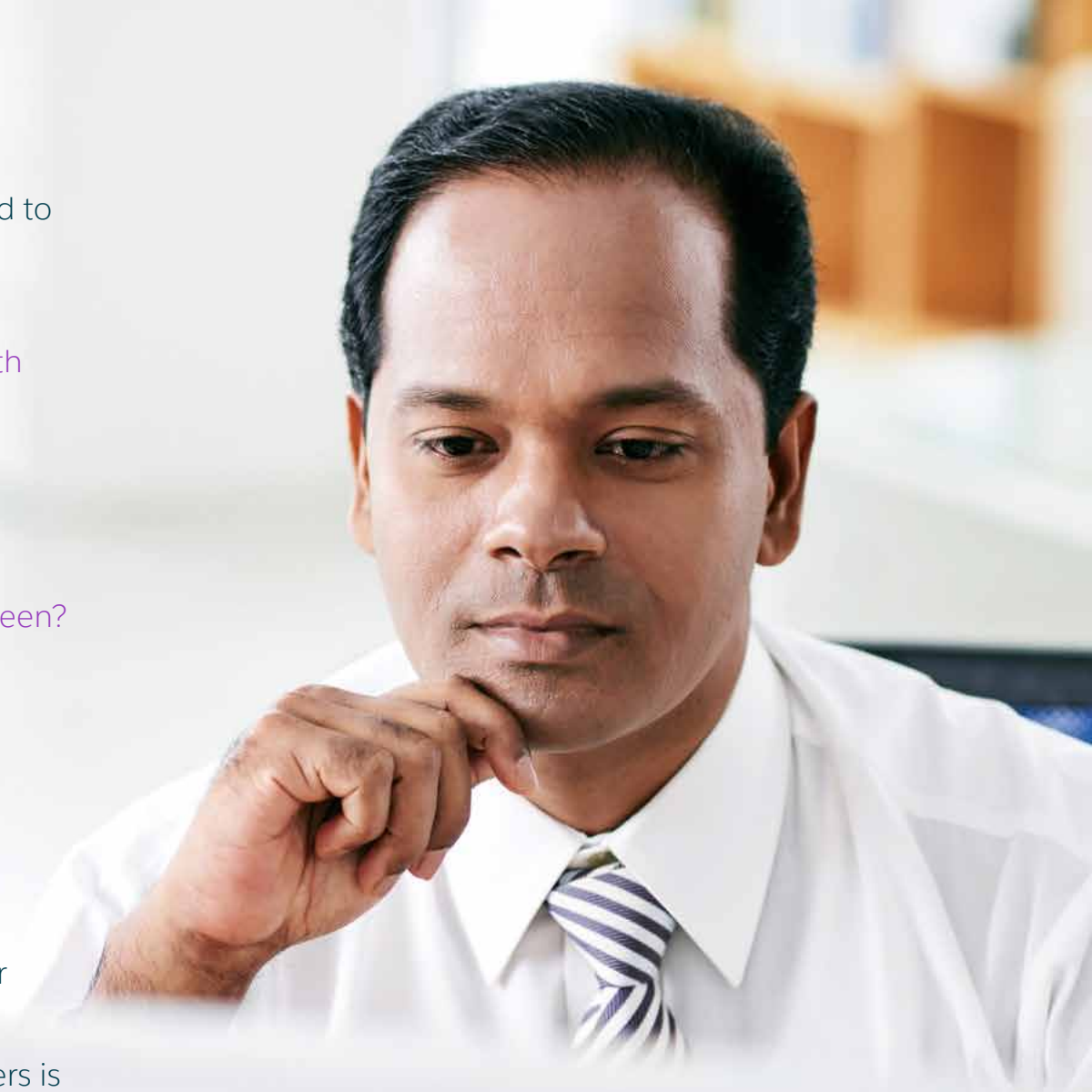
STEP 4:

Allow Agents to Go Off-Script

You could hire a team of smart agents, train them well, and compensate them fairly. But when agents are chained to a script from which they cannot deviate, conflict can arise quickly.

The connected customer certainly doesn't view themselves as one-size-fits-all and can sniff out inauthenticity within minutes. They're demanding personalized experiences, but scripts can be the antithesis of personalization.

Agents are often given scripts that they have to follow, but that leaves no room for them to make judgement calls in the moment based on the individual customer. Customers who are dealing with more complicated issues already know they must often speak to multiple support agents and move up the chain before they can speak to a manager who is qualified to *actually* help them. If a customer talks to everyone within your org chart, you're doing something wrong. Customers expect agents to be service ambassadors and create personalized experiences.

It can seem a bit nerve-wracking to let agents "go off script," but brands need agents who can think on their feet and make sound decisions on the fly. Instead of a seemingly never-ending rule book, have a few principles that focus on the one primary goal: create happy customers who tell others about their service experience. Surveys show that 69% of customers believe their customer service experience improves when agents don't sound like they're reading a script.

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STEP 5:

Help Agents Focus on What Matters

Many customer service calls are questions that agents answer repeatedly. You've spent the time and money to hire and train the best agents you can get, but they're wasting their time answering questions that anyone could answer.

Customers increasingly want to answer questions on their own rather than take the time to send an email or wait on hold in the queue of an 800-number. Arm customers with as many easily accessible resources as possible to do their own due diligence, such as a knowledge base and self-service community. Do some research on the most frequently asked questions and start building the knowledge base – but don't forget to continue to update the system as additional FAQs arise.

A full self-service community takes this one step further by enabling customers to help themselves, and each other. Customers can post questions in the community and collaborate with other customers via comments to get to the best solution, freeing up agents to use their experience to tackle the tougher cases.
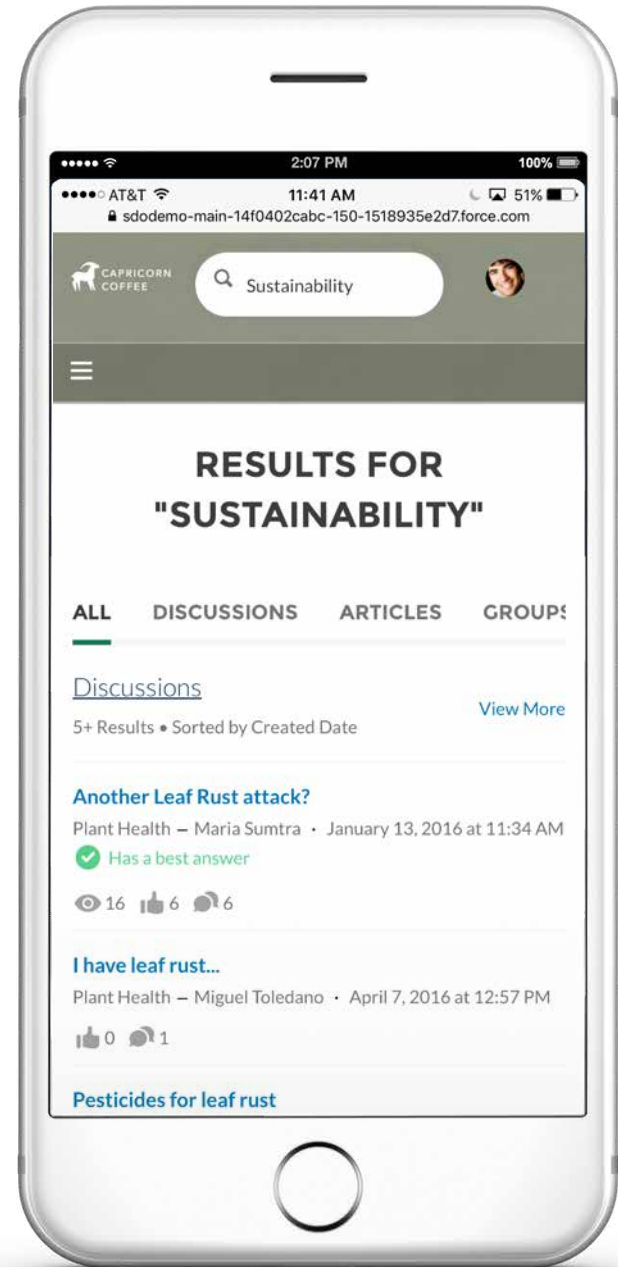
STEP 6:

Offer Agents Opportunities to Grow Their Career

Often support roles can feel like a stepping stone to bigger, better things (probably at a different company). It's no secret why: historically, customer service jobs have little-to-no upward mobility and limited training opportunities.
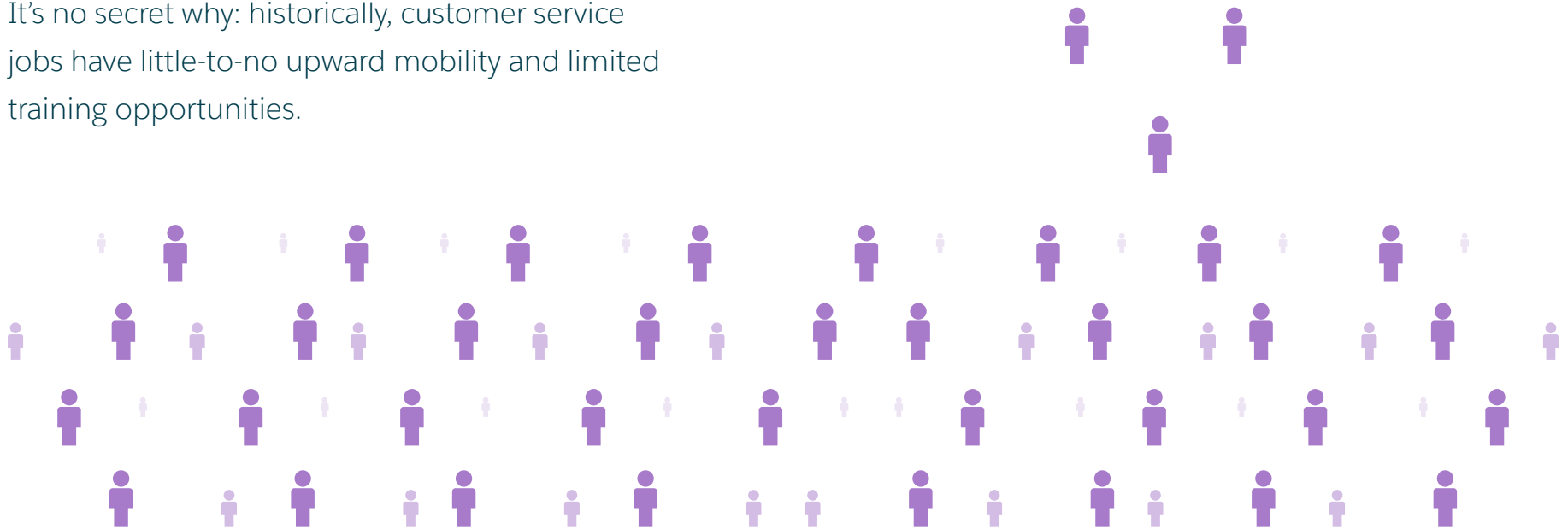
The customer service landscape is expanding dramatically as customers increasingly prefer to send a tweet or use in-app video chat to receive service – and their expectations for speed and personalization are growing. This offers incredible opportunities for service agents to expand their arsenal of skills beyond just engaging in a phone conversation.

Agents should get ongoing training beyond the first week on the job. Additionally, open up existing leadership training opportunities to all your employees, including your support team.

STEP 7:

Measure the Right Things

Customer service has changed dramatically, but many businesses are still using the same outdated metrics to measure success. Focusing on metrics like agent talk time, handle time, and agent wrap-up time get in the way of providing excellent service. Both are metrics measuring agent productivity – talk time measures the number of minutes an agent spends on the phone with a customer, and wrap-up time measures the time required by an agent to complete work directly associated with a call after the call has ended.
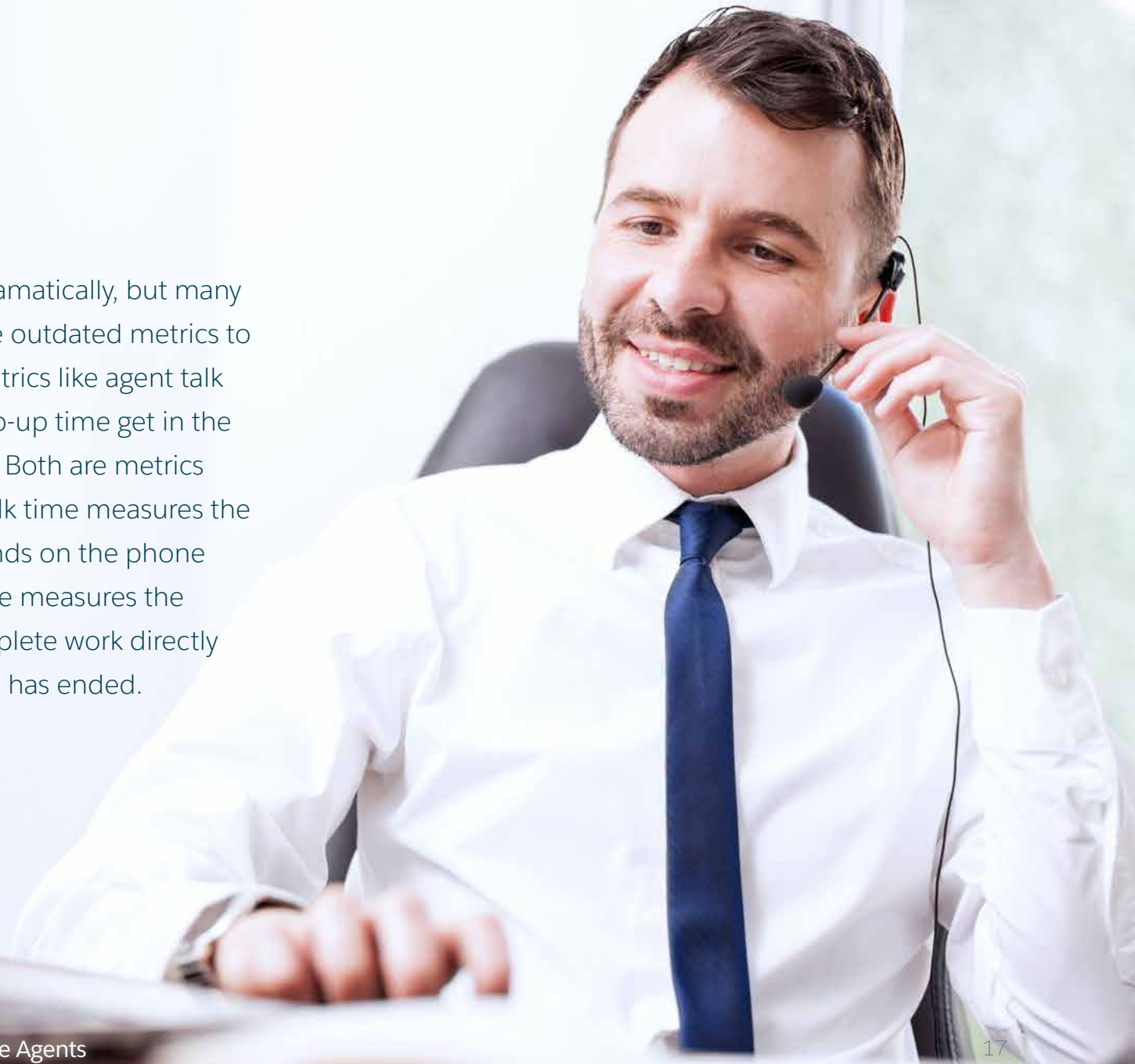
However, neither of these metrics indicate if the customer had a positive experience with your company. Customers would certainly prefer to be on the phone for less time, but not if they have to make more than one call to get a resolution.

That's not to say that agent productivity isn't important. It's absolutely crucial to keep your agents productive, and that's what tools like Service Cloud help businesses do. But to prioritize agent productivity as an indicator of success above all other metrics that relate more directly to the customer experience is a big mistake. So what should businesses look at instead? Metrics like CSAT, Net Promoter Score or Customer Effort Score are better indicators of the customer's experience, rather than just the agent's speed. Speed is great, but customers would prefer to get the right answer than an incomplete answer, even if it takes a few extra minutes.
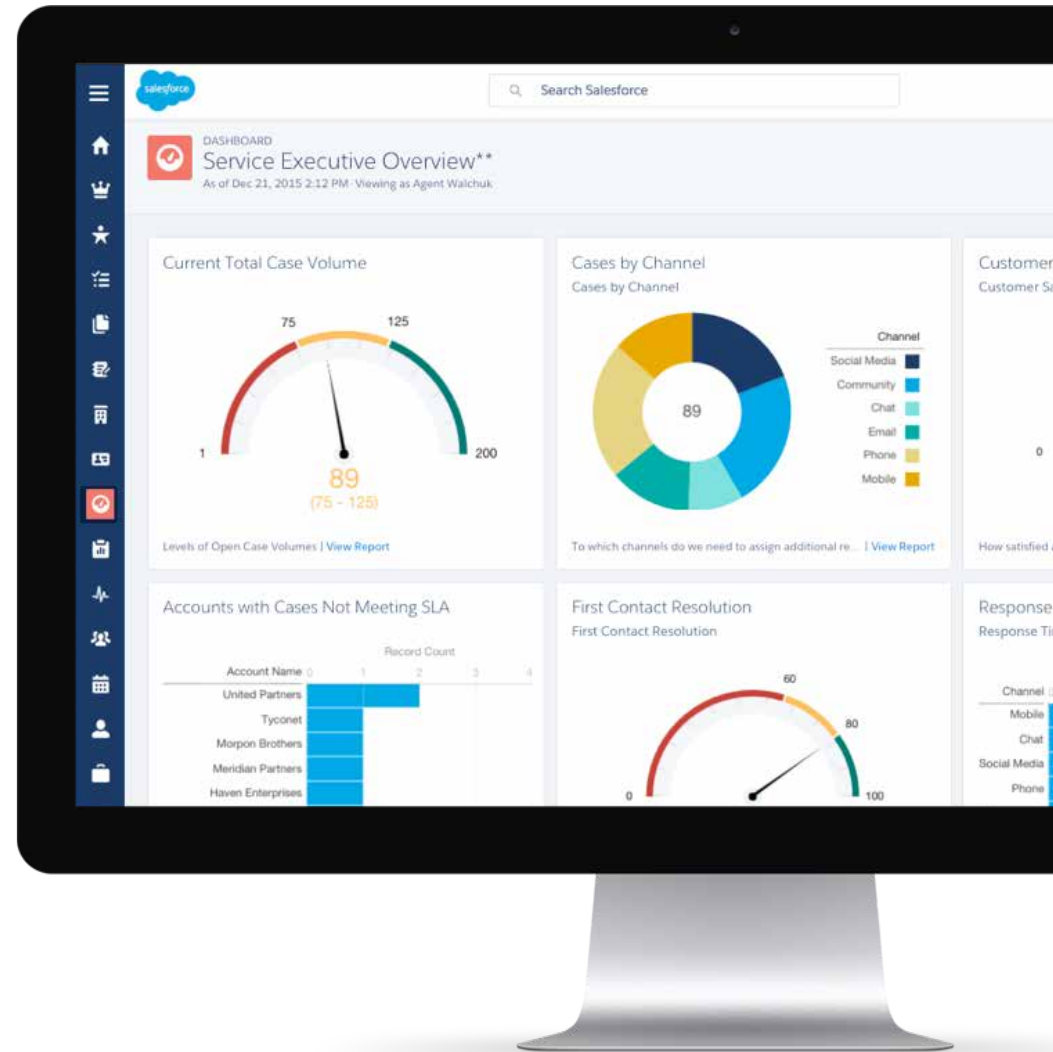
STEP 8:

Engage Them and Reward Them!

There is plenty of buzz surrounding gamification in sales, but the very same tactics can benefit contact centers as well. While targets may differ between sales and customer service teams, motivational techniques don't have to. By bringing in real-time contests, reps can engage with colleagues, strengthening your company culture and improving agent morale. Gamification brings an element of fun to an occasionally monotonous job.
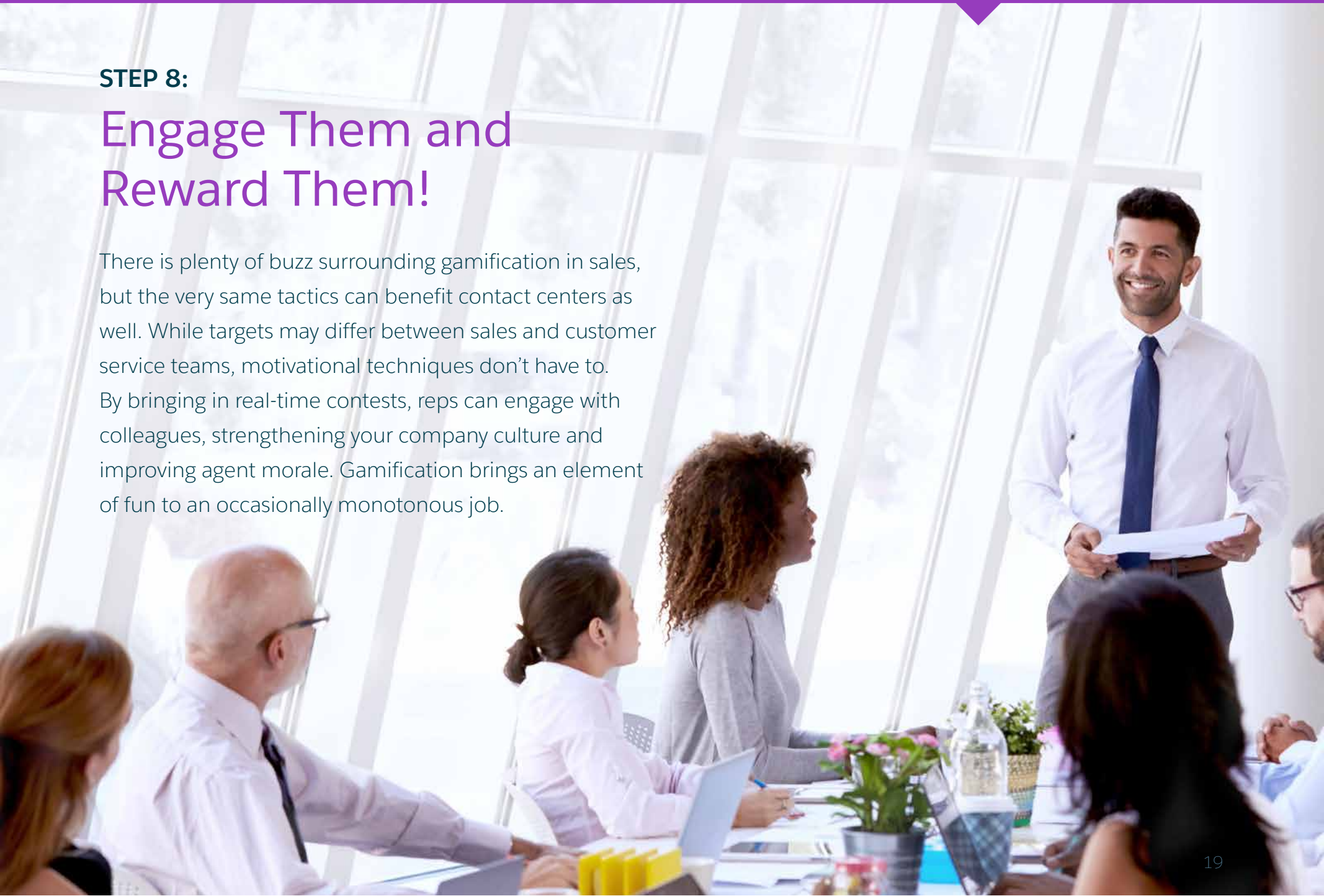
Reward employees for a job well done and make sure they can use those rewards outside the office. Work-life balance is important to your employees, so if possible, keep your reward initiatives focused on helping your agents make better use of their time away from the contact center. Be it tickets to local events or gift cards, make certain your rewards recognize that your team has a life outside the office and you're happy to help make that life more exciting. Additionally, turn quality reviews into episodes of catching agents 'doing something right' rather than scrutinizing where they may have deviated from a script that can be an impediment to what customers are looking for.

STEP 9:

Employ Victory Sessions for a Winning Routine

A victory session is a 30-minute meeting every two weeks where a team goes around the room with each member telling about the wackiest customer or toughest situation that they handled successfully. Four things happen at once in this meeting: First, the agent gets recognition for a job well done and even the lowest performer gets peer and supervisor recognition. Secondly, education occurs – the agent describes how he explained the warranty to the customer so that the customer accepted it. Everyone now has a new word track on that issue.

Thirdly, the empowerments is reinforced with a team member gets applauded after describing how he used his problem-solving skills. Finally, the process creates an informal incentive to "go the extra mile." The next time the agent encounters a difficult customer, she thinks to herself, "this person would be a great story for next Thursday – I'll be able to talk about him only if I can successfully handle this situation."
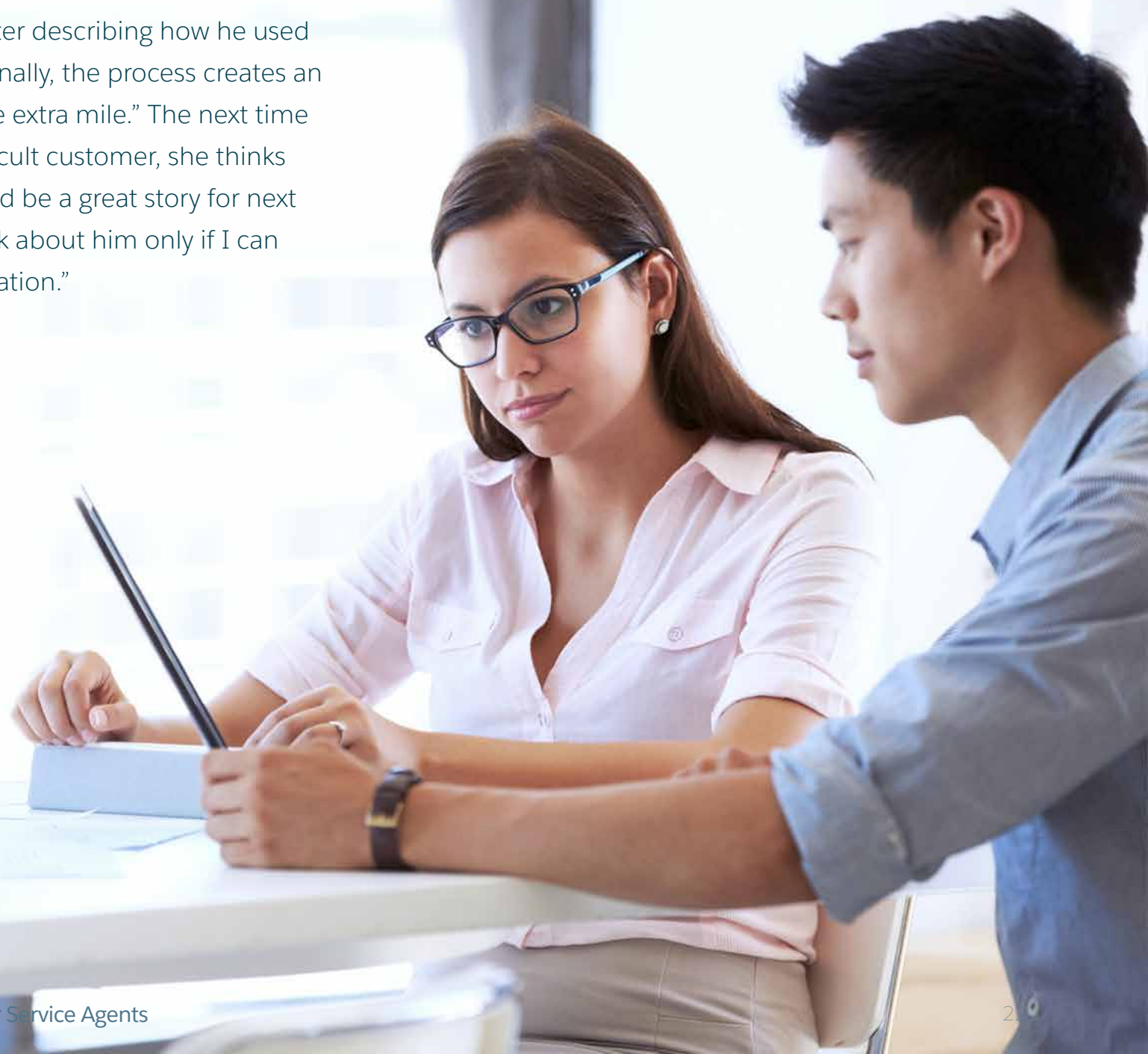
STEP 10:

Keep Productivity Top-of-Mind

It's impossible for your agents to know absolutely everything to answer every question – even your most powerhouse agent will come across a tricky case every now and then. But when the clock is ticking and your customer is looking for answers, you need technology to step in and help. Tools like [Service Cloud Lightning](#) do the heavy lifting for you by automating tedious processes and delivering 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.
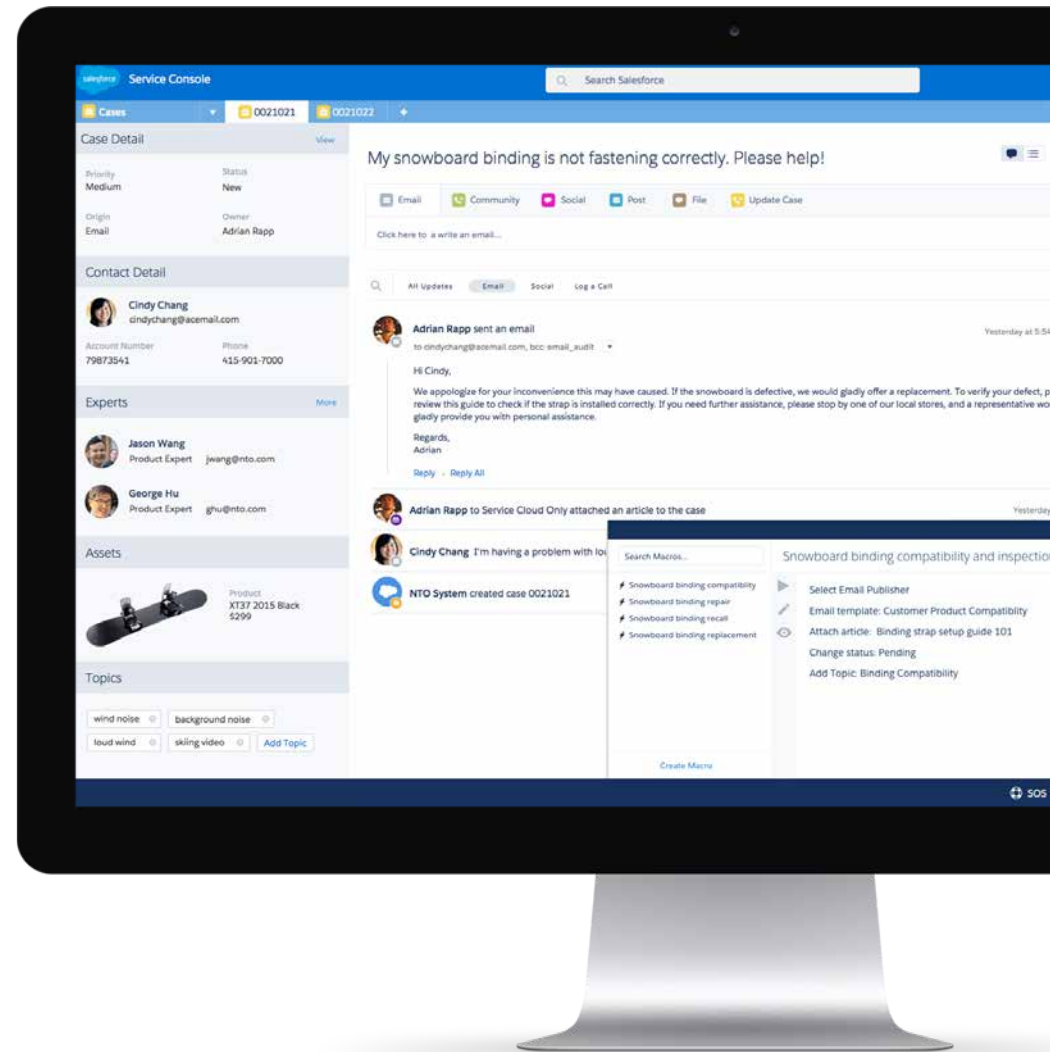
The Lightning Agent Console unifies the entire agent experience at the agent's fingertips – managing cases, customer history, and dashboards are all available in a single console, no toggling across multiple tabs required. Your business already has the data it needs to create a 360-degree of its customers, it's just a matter of putting it in the hands of the agents, silo-free. Regardless of whether a customer contacts the business via social media, live chat, post in the customer community, or phone call, the agent never has to navigate away from the Lightning Agent Console.
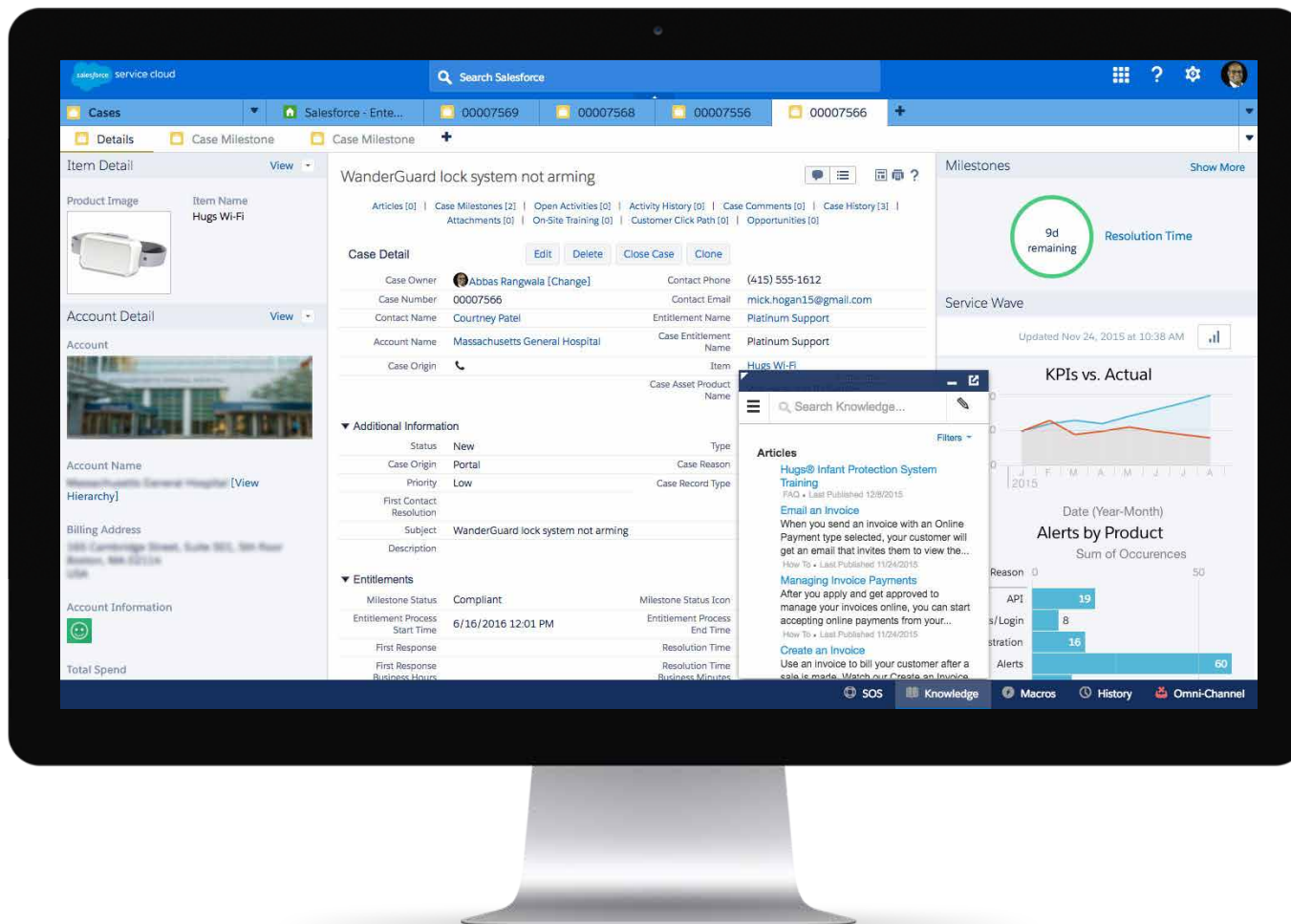
When a case is received, the console surfaces the customer's profile, purchasing history, and account information, all in one place. Customers can expect the same unified experience regardless of channel. Depending on the case, agents can also access knowledge-base articles and subject matter experts directly from the console. The Lightning Agent console also learns from your actions the more you use it, intuitively putting all of the most frequently used actions right where agents need them most.

As your brand ambassadors, the agent experience should be as simplified as possible so they can productively focus on what truly matters – building stronger, personalized relationships with your customers.
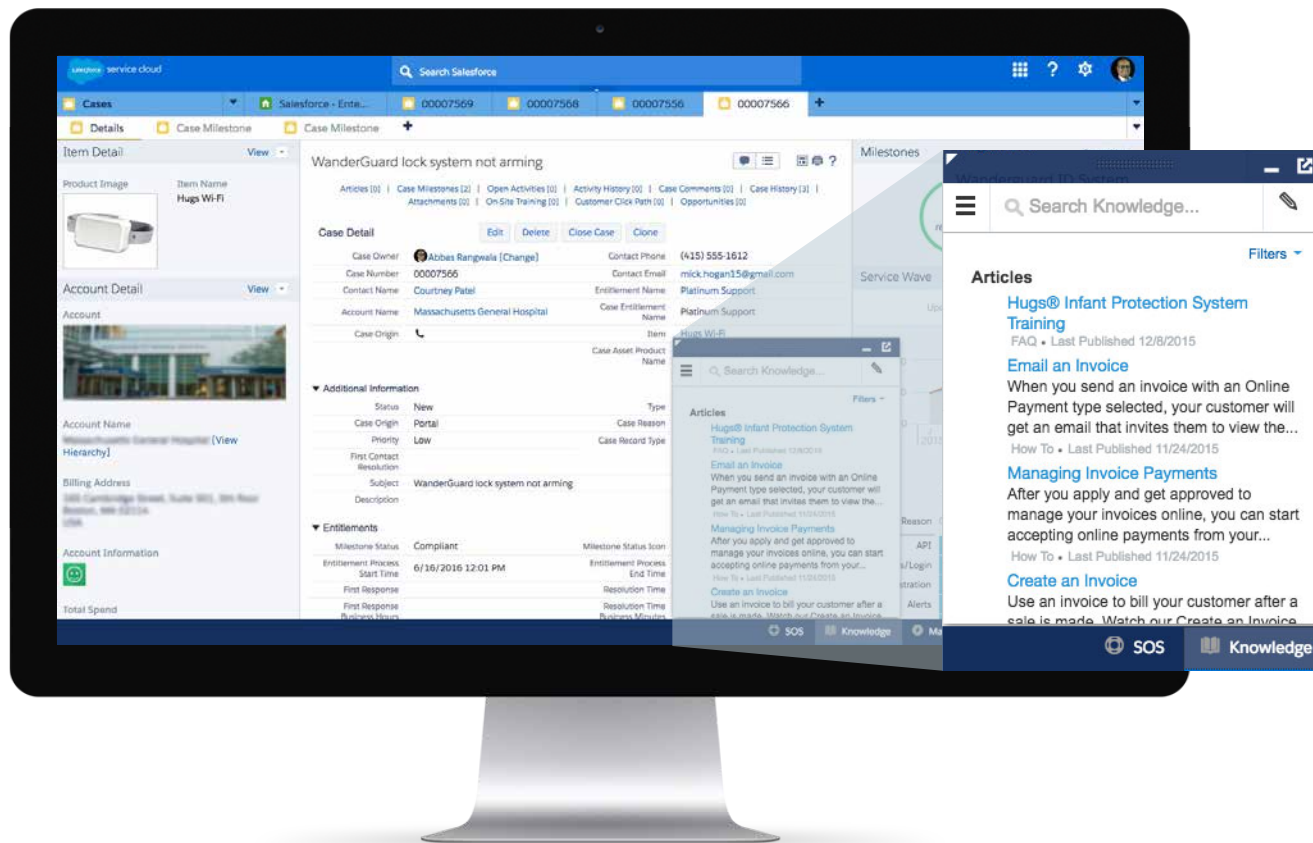
Conclusion

A big myth in the customer service field is that agents just want money – but saying agents only want more money is like saying you always lose the sale due to price. Agent dissatisfaction is a much more complicated tapestry. Empowering your agents does so much more than boost agent satisfaction – it creates opportunities for agents to drive personalized customer experiences, which grows your business and generates more revenue.

Your customers expect a service experience that is faster, smarter, and personalized requiring minimal effort on their part. Thriving support teams are excelling by not simply meeting but rather exceeding customer expectations, which requires empowered agents with the right training, tools, and resources at their disposal. 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.

LEARN MORE
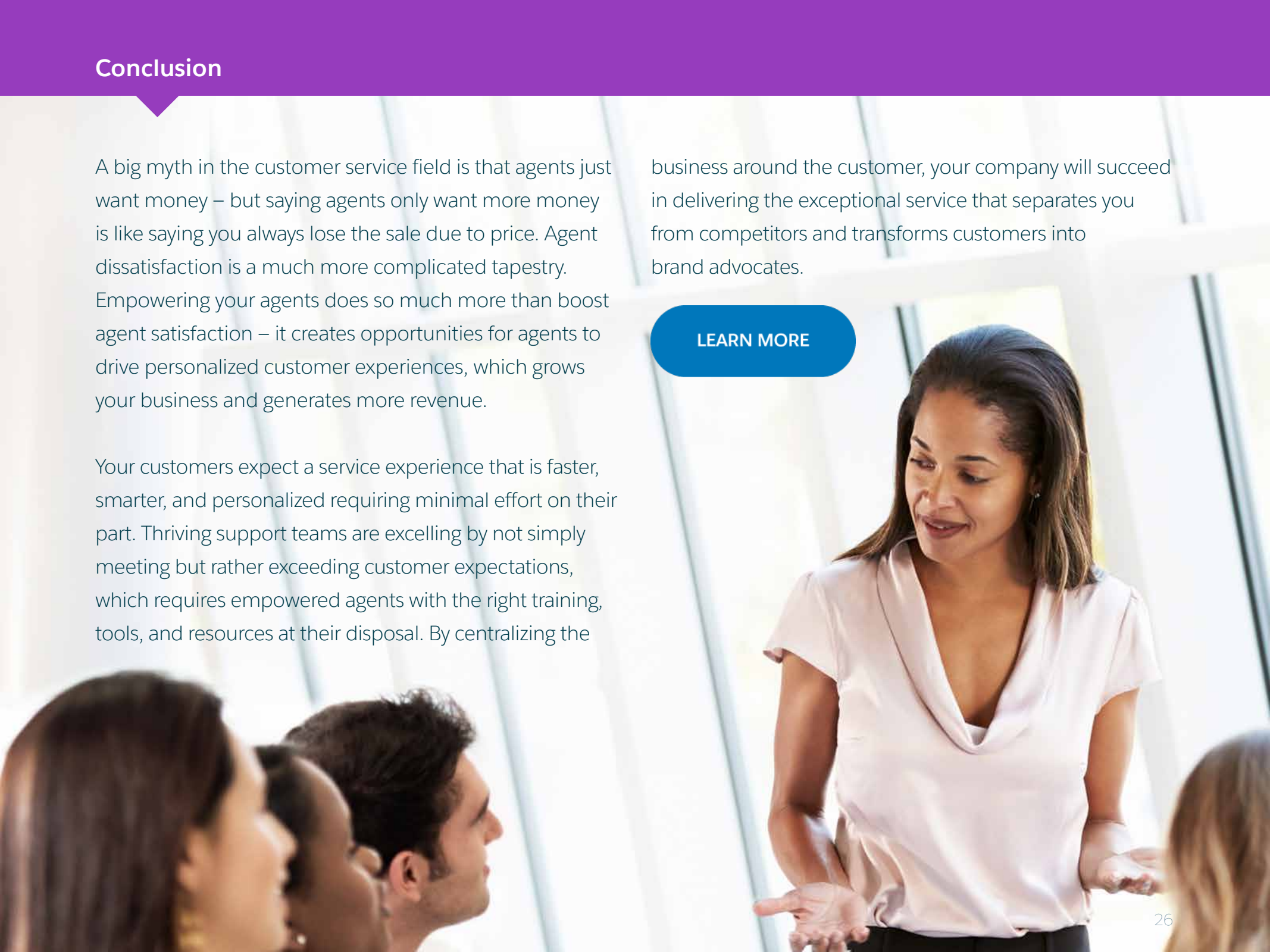
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**CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY**