25 TIPS AND TRICKS FOR

Amazing Customer Service

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Introduction

The pillars that are driving a superior customer service experience are changing. It used to be that just answering a customer's question correctly and in a somewhat timely manner would cut it – but in 2016 that's not so. Your customers carry more devices, and are more connected, informed and empowered. Today's ultra-smart customer demands connected, seamless interactions, experiences where they can choose the service that best suits their needs and consistently offers personalized journeys across all devices. More often than not, the future of business success often depends on whether companies can deliver on those expectations.

That's why we've created this e-book – to help you connect to your customers and deliver the tailored customer experiences that they expect. We asked expert service members of our Success Community for their best tips and tricks on delivering next-generation customer service. From boosting agent productivity to enabling a premier self-service experience, here are 25 tips that will make sure that you transform your team into a world-class service organization.

KNOW YOUR CUSTOMERS

Although providing timely, fast service remains a key business differentiator, it's just one piece of the puzzle. Your customers invest a lot of time and money in your product and your business; they no longer accept feeling anonymous when they call, email, or tweet your customer service department. Knowing your customers means developing a complete 360-degree view of them.

If customer insights come in the form of an annual survey or quarterly focus group, your company is not in a position to act quickly. When customers want service provided in a new channel, or when retention numbers are slipping, your business is way behind. It's critical you act on that information in real time.

Tools such as Service Wave Analytics make sure that your customer support teams are armed with the insights they need – on their customers and on their own performance – so they can personalize the service experience for each and every customer.
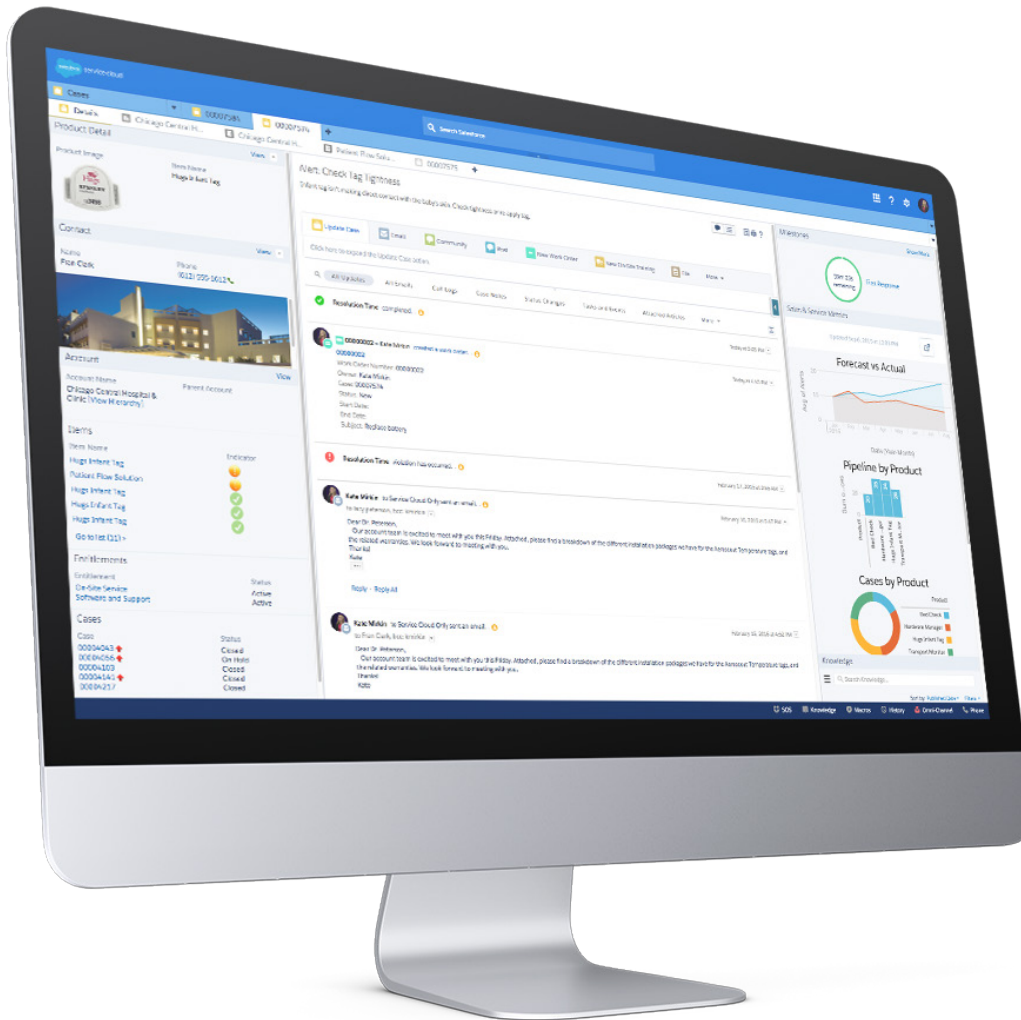
TIP #1

"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 they already knew who you were, the products you own, and all previous interactions you've had with the company – on any channel. That's a company you'd want to tell your friends about. Technology like Service Cloud makes this next-generation experience entirely possible.

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

service cloud

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 and delivering an experience that meets their expectations, as well as caring about your agents, including their training and preparedness. Want to learn more about the four steps to incredible customer service? Check out this interactive infographic!

4 Steps to Incredible Customer Service

Insights from the State of Service Report

Over the past several years, customer service has undergone a dramatic shift. Once, you might have had only one option for contacting a company: making a telephone call within business hours.

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 PRODUCTIVITY

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 [2015 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

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's Lightning Console 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.

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: 34% of millennials say they'd rather get their teeth cleaned at the dentist than call a customer service line, according to Desk.com. 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 and 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 2015 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: a customer not being able to find the information they need online, being passed around on the phone to numerous different agents, or a lack of mobile service capabilities.

One way to make the service experience as easy as possible for your customers is by taking your mobile service capabilities to the next level with in-app support that includes one-to-one support with live video and screen annotation. With SOS for apps, personalized mobile assistance is only one tap away.
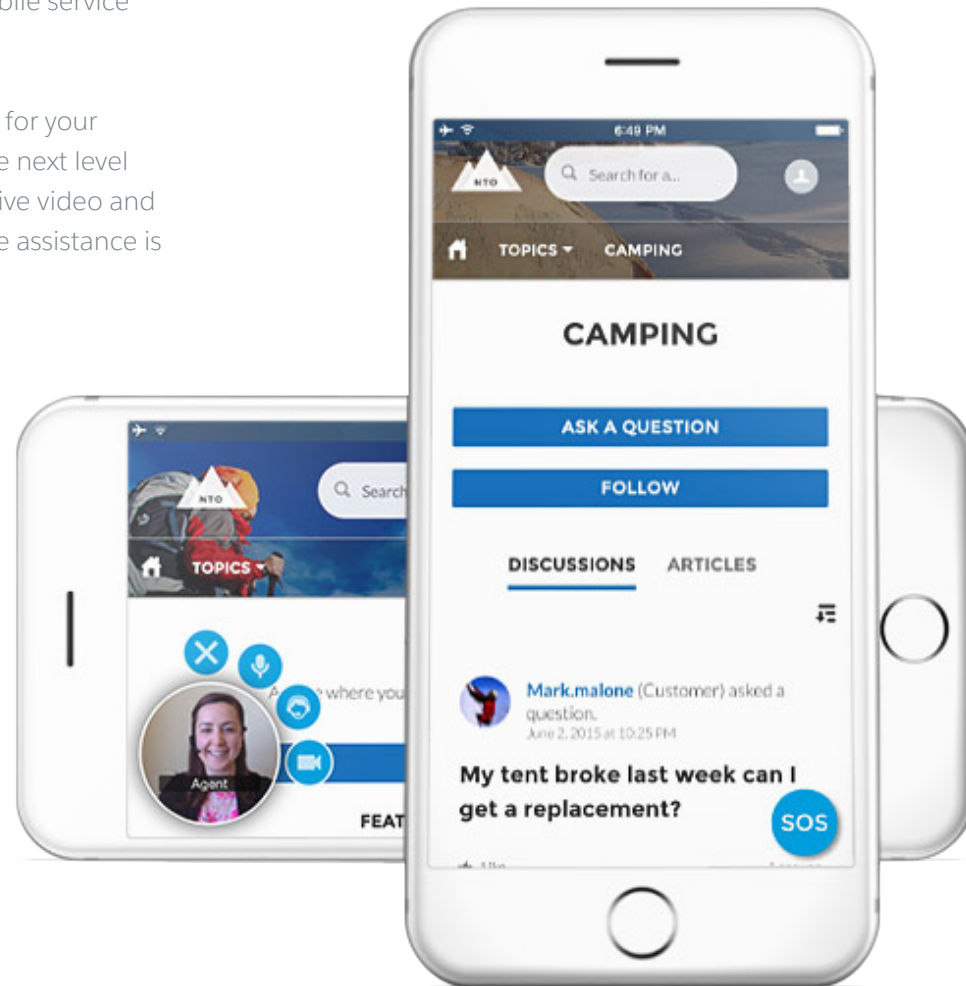
TIP #22

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

Patrick Connelly
@aelst

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 is smart, personalized, and requires minimal effort on their part. Thriving 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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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY