

Customer Service

20 Best Practices



Price and product can both be duplicated, but a strong customer service culture can't be copied.

The future of business success depends on whether companies can deliver a customer experience that meets their rising expectations in this new, hyperconnected world. With Salesforce Service Cloud – built on the Salesforce Customer Success Platform – any company can deliver a customer service experience that is more personalised, smarter, and faster than ever before, increasing customer satisfaction and creating brand advocates. Use these 20 best practices to build a highly successful customer service engine – then leverage the power of Salesforce to take it to the next level and ensure that every single one of your customers is successful.

- 03 CHAPTER 1:**
Go Where Your Customers Are
- 05 CHAPTER 2:**
Treat Customers Like Friends
- 07 CHAPTER 3:**
Build an Exceptional Team
- 10 CHAPTER 4:**
Engage every Employee
- 12 CONCLUSION**

CHAPTER 1

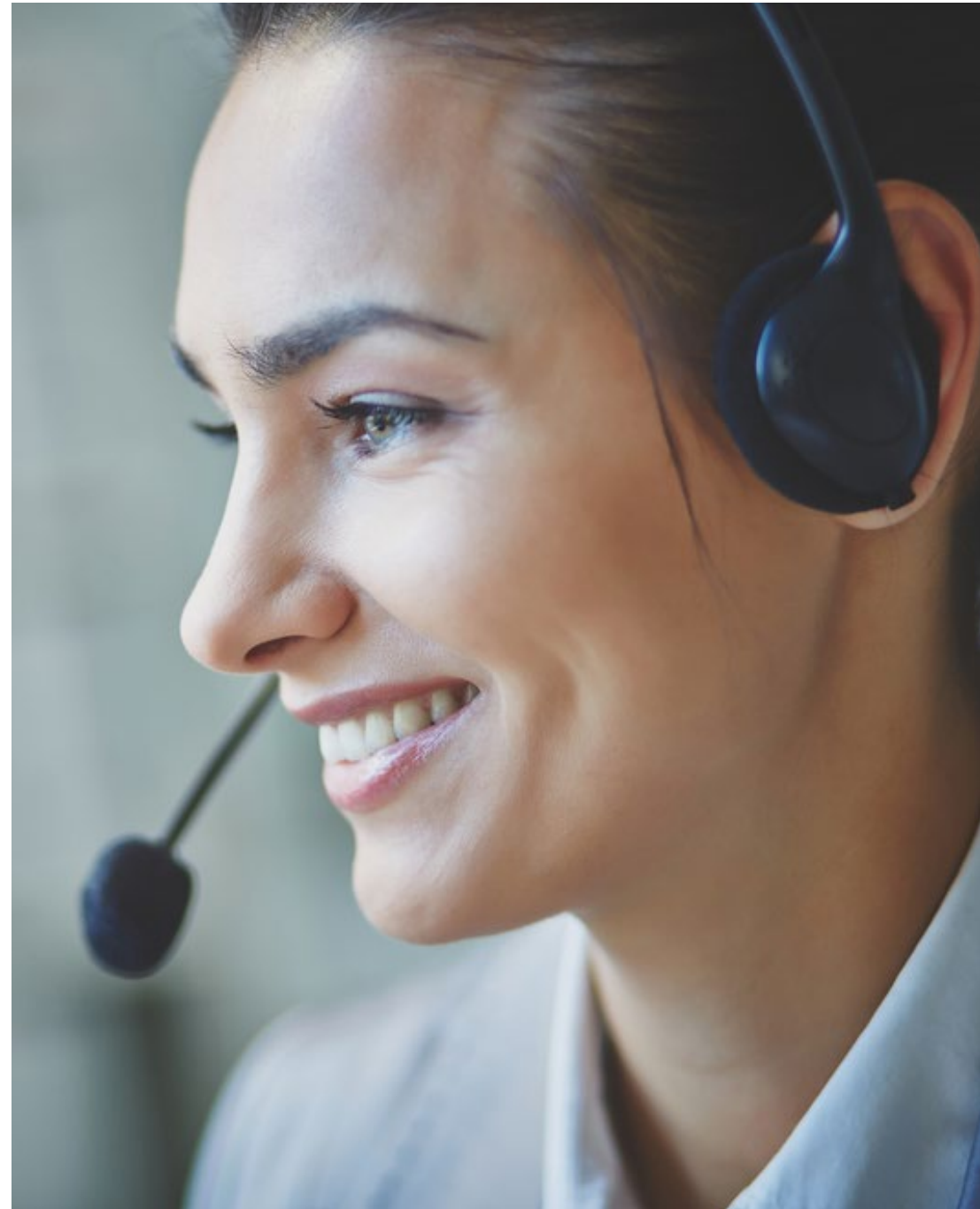
Go Where Your Customers Are

Today's customers have high expectations for on-demand, efficient service. In a given day, consumers may contact your brand via myriad channels – phone, website, live chat, mobile app, social media, email. Businesses should be ready to deliver exceptional service on any channel, at any time.

How do you go where your customers need you?

1. Know your customers, wherever they are.

Customers often report lower satisfaction when they're forced to visit multiple channels in order to resolve an issue. **Make sure your agents have the tools to know every customer**, regardless of how they're reaching out, including preferred communication method, purchase history, and issue resolution status. This way, when a customer starts explaining a problem on live chat, she doesn't have to start over on the phone.



2. Leverage customer information.

Use your contact centre as the collection point for complaints, comments, and product suggestions. Your team should **centralise all customer data in one place**, making it accessible to anyone involved in the customer experience.

3. Use channels your customers prefer.

When a new customer arrives, **find out which channel they prefer** for service assistance. As part of your onboarding experience or welcome call, ask how they'd like to be contacted if an issue arises. If your onboarding experience includes a welcome email, include a handy list of all available service channels. Your marketing should also give customers clear instructions on how to reach you when they need you.

4. Offer mobile service options.

Mobile devices have surpassed desktop computers as the primary means of consuming internet content. In other words, **your customers are increasingly mobile** – which means you need to be mobile, too. If you have a mobile app, be sure that service options are clearly delineated. If you don't, make sure your website is optimised for mobile devices and offers a clear path to customer support.

5. Provide omni-channel training.

Having a presence on every channel is only half the battle. Your service agents also need to have the tools and training to be able to engage customers meaningfully and effectively on every channel. After you figure out where your customers are, **invest in training** so that your team is ready to help.

Next: Treat Your Customers Like Friends

Treat Customers Like Friends

Good service experiences address a customer's question or problem. Great service experiences offer something more. Companies that are leveraging their service teams to create real competitive advantages are using service as an opportunity to delight, empower, inform, and engage their customers.

Here's how to be “real” in every customer interaction.

6. Share helpful content.

Empowering your customers isn't just about solving their problems – it's also about giving them the tools to find solutions and help others. Helpful content – whether it's an e-book, blog post, news article, infographic, or whitepaper – can help your customers become sources of knowledge. To use content effectively, maintain an open line of communication with customers to ensure the content you're sharing is useful.



7. Turn setbacks into solutions.

Occasionally, you'll come across a customer who just likes to complain – and sees a customer service agent as a perfect opportunity to let off steam. Keep in mind that while these interactions may be frustrating, they're a path to **new insights about your product capabilities and limitations**. Ensure your team treats every complaint as an opportunity to make your company better.

8. Keep it real.

This may sound obvious, but it's critical to avoid canned responses and **keep interactions authentic**. Train your customer service teams to be genuine, and encourage an open and candid tone with customers. If your customers feel comfortable, they'll speak honestly – which will help you resolve issues faster.

9. Leverage the experts.

Encourage your agents to **collaborate directly with the external experts in your industry**. **Choose experts** who are devoted fans of your product or solution, are highly engaged, and will help others get the most out of your offerings to create even more satisfied customers.

10. Follow the regulations.

No matter what type of interaction you're having with customers, ensure that you're **following industry regulations**. This is especially important when you're expanding your customer service to new channels, such as online chat or social media. Don't assume your existing procedures already comply with a new channel's unique regulations, and make sure the proper organisational policies are established and enforced.

Next: Build Your Team

Build an Exceptional Team

The success and failure of any customer service department depends on the experience, skill, and determination of its team members. Hiring the right service agents can set you up for incredible success down the road, or limit your ability to provide adequate service right from the start.

11. Start with the interview.

During a session at 2013's Call Centre Week event, Kimberly Warrick, Client Services Manager at NJ Shares noted that agent motivation should be considered from the very first interview. Here, you have your prospective agent directly in front of you, ready to answer any questions. That's the time to **get your first look at what motivates them.** Before they've even put on a headset, you've got the chance to make note of what will keep this potential service team member motivated. Just ask them!



12. Hire for culture fit.

Many agents will have the skills, fewer will have the attitude. The right culture fit should be what gets an agent hired. Sometimes, it may be worth keeping customer service positions open a bit longer to find the right person rather than rushing to fill available positions. The long-term cost of hiring the wrong person can be much greater than keeping those spots unfilled. Cutting down on attrition begins with bringing the right people on board in the first place.

13. Think beyond the cubicle.

The millennial generation has huge career aspirations, and as potential hires, they often make up their mind during training whether they'll work at your center for a long-term period. Telus International has seen a decline in attrition rates through initiatives such as Telus University, which allows employees to gain arts and business credits while still working with the company. They fully invest in their customer support team members' development outside of the customer support role.

14. Implement gamification.

There is a plenty of buzz surrounding gamification in sales, but the very same tactics can benefit contact centres as well. While targets may differ between sales and customer service teams, motivational techniques don't have to. By bringing in realtime contests, reps can engage with colleagues, strengthening your company culture and improving centre morale. Gamification brings an element of fun to an occasionally monotonous job.

15. Leverage multiple channels.

Adding new customer service channels doesn't simply offer new options for customers to interact with your company. Agents benefit by acquiring and using additional skill sets that can improve their resumes while breaking up the monotony of their day. Many agents will welcome the change of pace and an opportunity to switch from answering calls to responding to emails and social media posts. Consider adding incentives that offer the opportunity to cover different channels if specific target goals are met.

Next: Engage Every Employee



Engage every Employee

Even the best teams will falter without proper coaching and incentivising. Make sure you are creating a culture of success on your service team and you'll find that success translating straight to your customers.

16. Allow for flexibility in scheduling. Make a conscious effort to make trading of shifts as quick and easy as possible. Consider leveraging your internal social networks to create a common space where agents can offer to give away and pick up shifts. A company that recognises that agents require that flexibility in their work schedule, and whose management team trusts employees enough to make shift changes happen easily, is a company that will attract and retain a higher percentage of their workforce.



17. Frame the job in a meaningful way.

When your service agents are asked what they do for a living, do they say they are a customer service representative? That they “talk on the phone all day”? Or do they say, “I help people with _____.” The latter is the ideal response. Your employees need to know they are making a real difference for your customers, and they aren’t just a collection of metrics and numbers.

18. Reward, reward, reward.

Reward employees for a job well done and be certain the rewards are those that can be put to use outside of the company walls. 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 centre. Be it tickets to local events or gift cards, make certain your rewards recognise that your team has a life outside the office and you’re happy to help make that life more exciting.

19. Give regular feedback & acknowledgement.

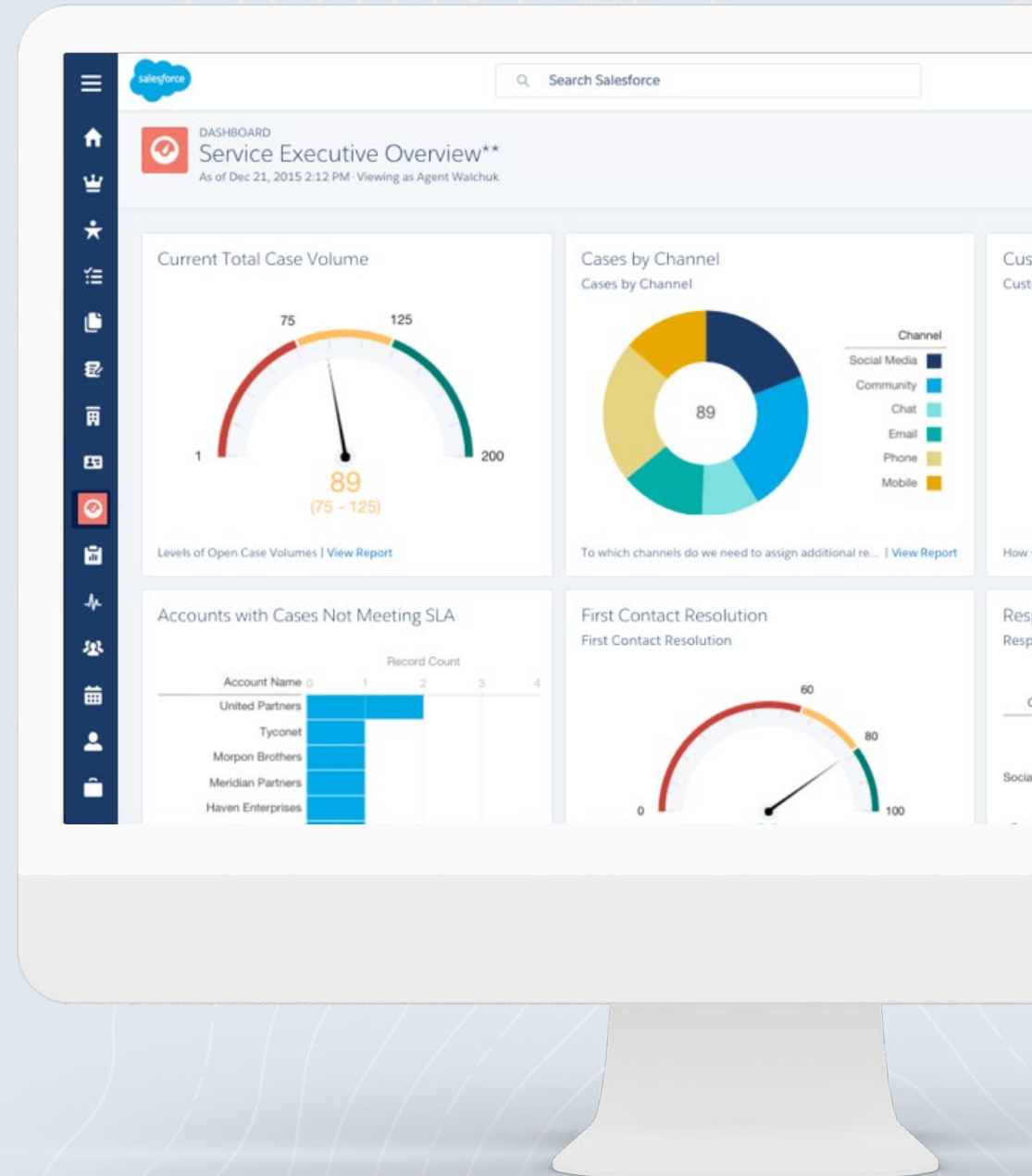
You don’t always need to spend money on tangible rewards in order to make your team feel motivated. Quite often, a supervisor’s quick email or internal social network mention to a team member on a job well done is equally as effective as a gift certificate. Continue to celebrate even incremental successes with even the smallest acknowledgement can brighten the day of an agent dealing with an otherwise stressful shift.

20. Provide opportunities for career growth.

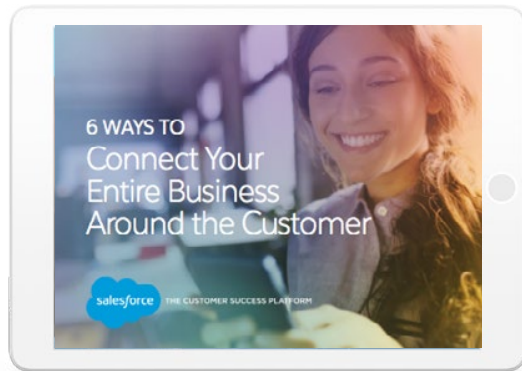
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Conclusion

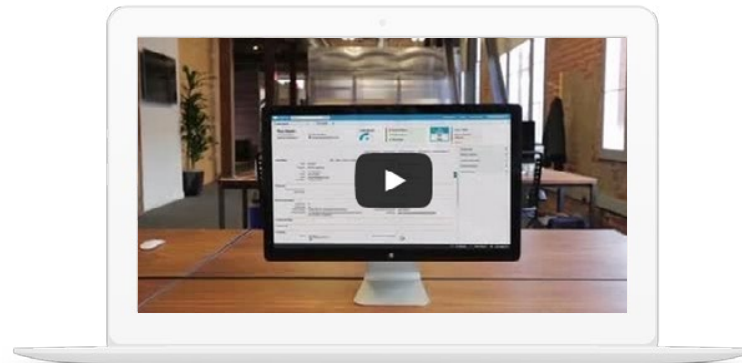
At Salesforce, it's our goal to help you succeed by making your customers happier. We want agents to resolve cases faster to keep customers delighted. We want to help you connect with your customers, where they are, by embedding service into every one of your apps. And we want to assist in ushering in meaningful insights into your service organisation. In this new era of the connected customer, there is no difference between pre-sale and post-sale; there is only customer experience. As customers' expectations continue to grow, Service Cloud is your partner in equipping your service organisation with the intelligent tools it needs to deliver incredible customer service in this new connected world.



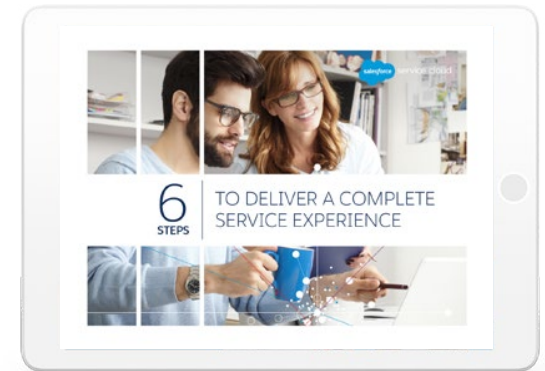
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