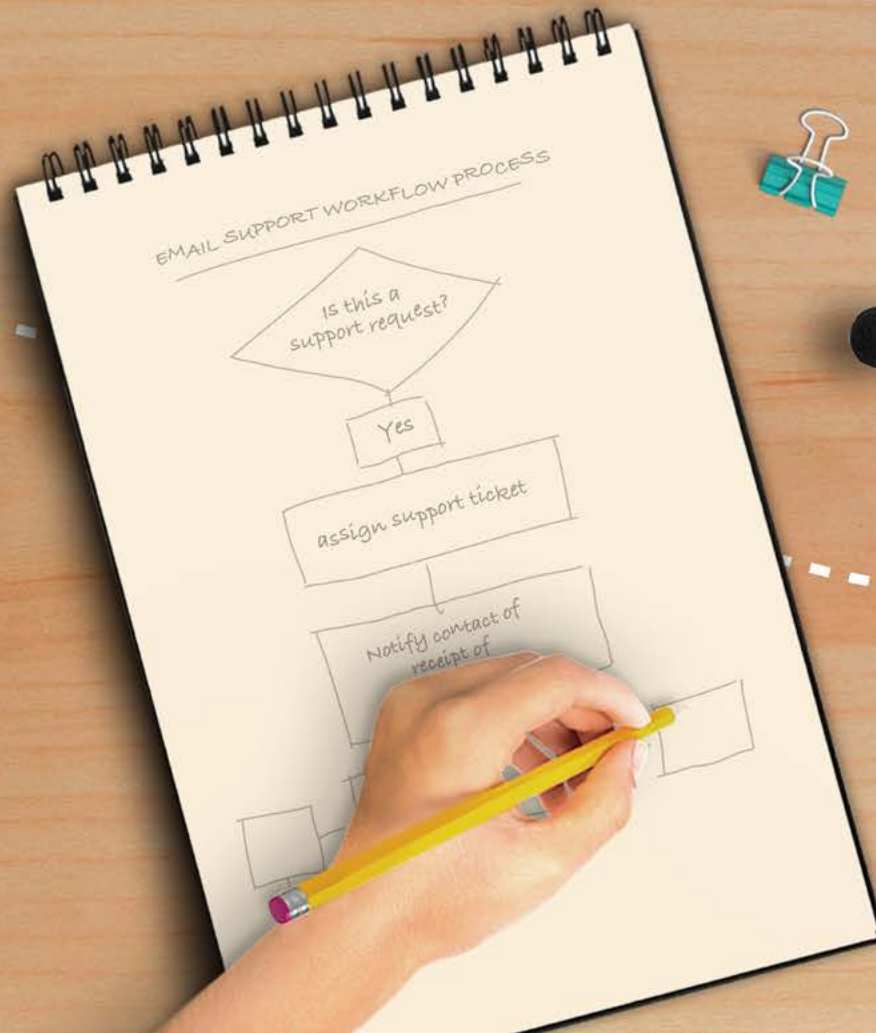


# Customer Service Roadmap

The Six Questions You Need to Ask When Scaling Your Customer Service



salesforce

# Getting started

In today's hyperconnected world, your product is only as good as the service you back it with. It's easy for small companies to think of customer service as just a checkbox item, but to be competitive and offer a seamless experience as you grow, you need to look ahead. Planning your customer service operations around future scalability is as critical to your business as setting your product roadmap. Want to set yourself up to offer amazing service, no matter how fast you grow? Here are six things to consider as you build your service roadmap.

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*Your product is only as good as the service you back it with.*

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### Trailhead: The fun way to learn Salesforce

Ready to learn the ins-and-outs of service with a CRM? We built our own learning journey to help you use the #1 CRM tool for growing businesses. It's called Trailhead, and it's a step-by-step, fun way to learn.

Get started now at [trailhead.salesforce.com](https://trailhead.salesforce.com)



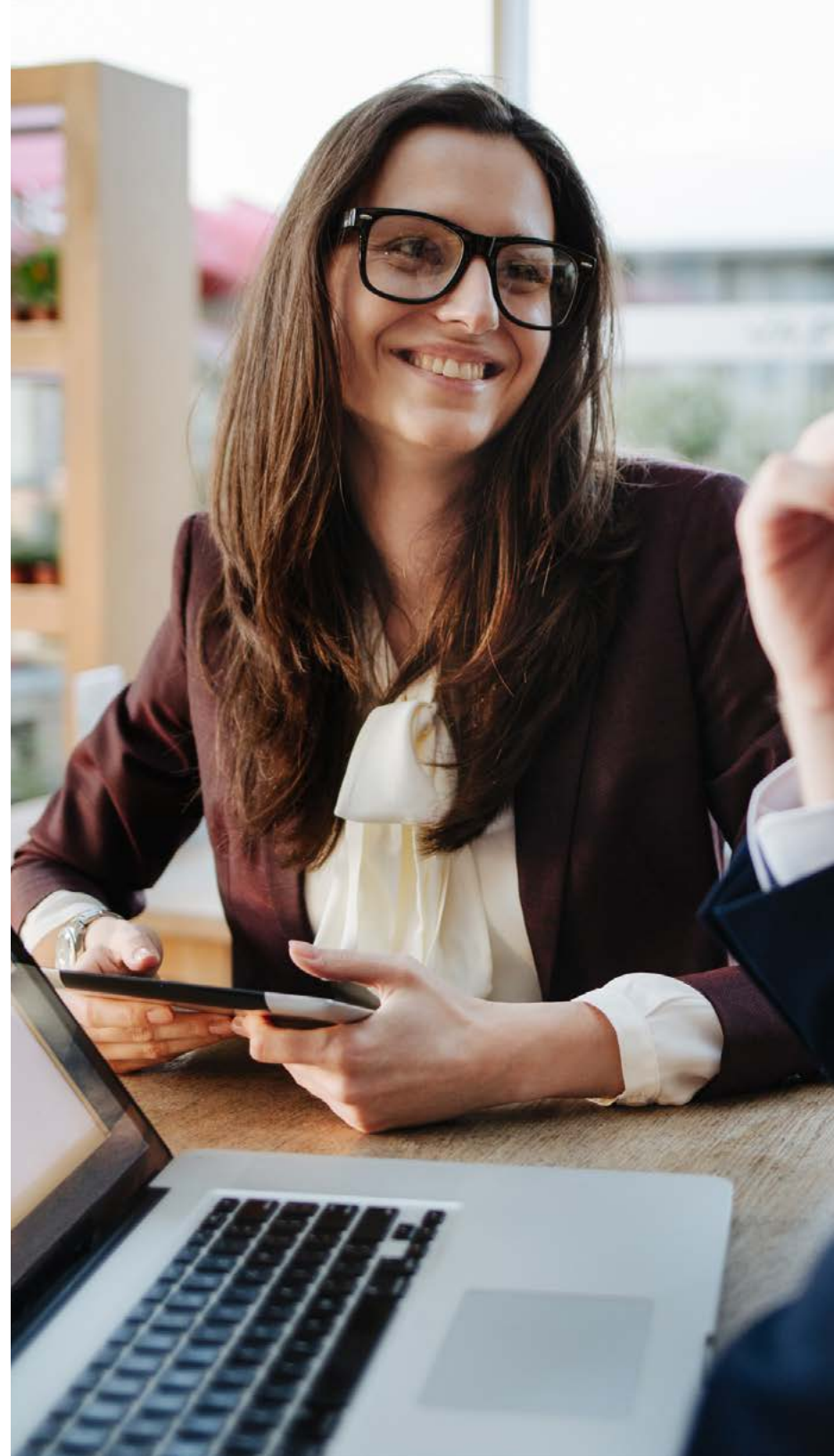
# 1

## What channels do you plan to support?

Most small businesses start out by supporting customers exclusively with email and maybe Twitter, but over time as their companies and customer bases grow, they start to need real-time support via phone or live chat to keep up with requests. Making the transition is a big step. Not only do you need the tools – like a dedicated customer service solution – to support this effort, you may also need a different type of agent. Phone agents need a good phone presence; chat agents need to be able to multi-task, since they typically work more than one case at a time. And for those different types of agents, of course, you need different training materials, plus a different version of your knowledge base for agents to pull answers from (the answers typically used on email will be too long for chat).

### Put it to action:

- ✔ Find a customer service solution that can grow to support phone and chat.
- ✔ Have a plan for training agents to learn the skills needed for each support channel.
- ✔ Optimize your knowledge base from the start with content for each channel.



## 2

# Will you tier support as you grow?

Small businesses typically start out with one or two customer service agents that answer all inquiries, but as you grow you will need to create dedicated teams for different types of requests. This is especially important for complex businesses, like financial services, manufacturing, and technology products. Most businesses will have a first response tier that can identify the problem and route customers to the right agents. As a company gets bigger, there might be a third layer of specialists who handle the really gnarly calls. Deciding in advance how you'll tier your support team enables you to put the right systems and people in place to divide and conquer support requests without disruption.

### Put it to action:

- ✓ Decide in advance how you would tier support if you need to have dedicated support times.
- ✓ Set up your filters so that you can quickly reroute them if you add another tier.
- ✓ Make time each month to refactor routing and escalation rules as you go.

“

*Decide whether future escalation rules will be based on customer type, geography, or problem severity before you architect your systems.*



### 3

## Are you planning to expand geographically?

If you start to support customers in different timezones, you may need to expand the hours you offer support or look to hire local support agents in those regions. You may also need to rethink how you'll route cases to let agents just starting their days easily pick up cases from agents who are ending theirs. Language is another consideration; not only do you need a support solution that's multi-lingual, you also need to be sure your knowledge articles are translated into multiple languages and that you have a plan for curation and maintenance so agents and customers can get up-to-date answers in every language.

### Put it to action:

- ✓ Choose a customer service solution with multi-lingual support, even if you don't need it yet.
- ✓ Put a process in place for quickly localizing knowledge base updates and new articles.
- ✓ Hire support reps that are fluent in the culture as well as the language.
- ✓ Plan for 24 hour case triaging, even if it's a combination of real people and case routing.

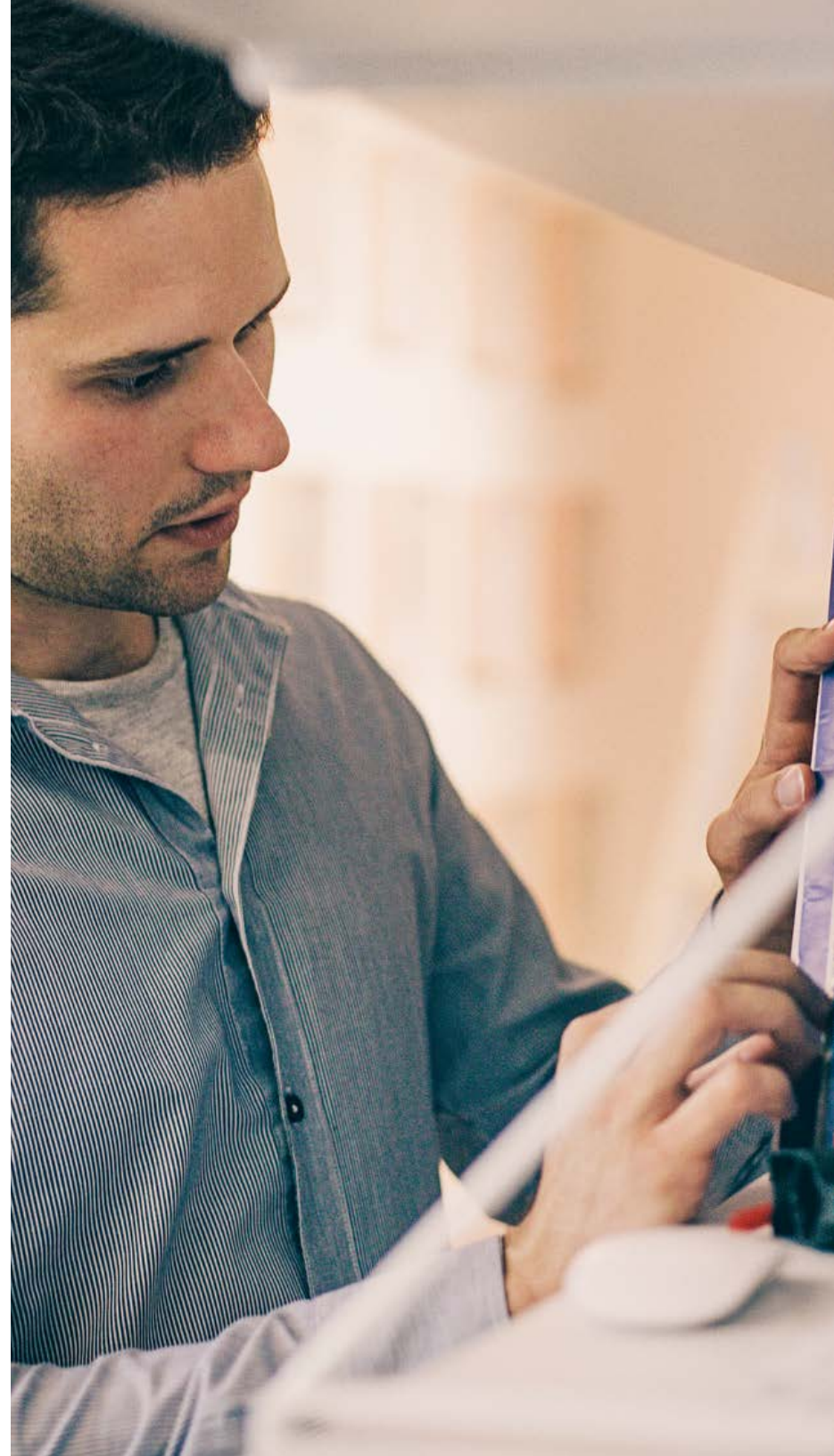
## 4

# Do you plan to outsource some of your service?

It's typical for growing companies to outsource some of their support operations (usually the tier one front lines) to a third party, especially if they expand across the globe or begin offering Service Level Agreements (SLAs) that require rapid responses. This isn't something that happens overnight. You need to look at the best ways to share information, route cases, and seamlessly pass cases back and forth. Training is also important. It can take longer than you ever thought possible to work with an outsourced call center to make them sound smart and represent your brand correctly, but to offer customers a quality experience it's vital to invest that time.

### Put it to action:

- ✔ Build support training materials that will work for internal and external audiences.
- ✔ Configure workflows for routing cases both to and from third party agents.
- ✔ Include SLA enforcement and KPI reporting when you make an outsourcing plan.





## 5

# What systems do you need to integrate with?

When you put a customer service solution in place, you need to identify the most important systems powering your business and determine whether or not you'll need to integrate with them for support. There are typically two ways to integrate systems. The first is via data, so you can visualize one system within another; for example, you can make it easy for agents to view shipping data within your support solution so they can quickly and accurately respond to delivery questions. The second kind of integration is when an action in one system triggers an action in another. For example, if a service case changes, it can automatically update a CRM system so the sales team know when it's appropriate to reach out with a new offer or add-on deal.

### Put it to action:

- ✓ Choose a customer service solution that easily integrates with your important systems.
- ✓ Make sure it's extensible to homegrown integrations and new, unsupported ones.
- ✓ Make sure the integrations work consistently across every platform and device.



## 6

# Are you prepared for rapid growth?

Every small business would like to grow as fast as companies like Lyft or FitBit, but rapid growth can be a downer if you're caught off-guard. In addition to the considerations already mentioned – including global expansion and system integration – you should also think about whether you'll support multiple brands and products over time and whether your customer support solution can scale as you grow. Can you accommodate call centers around the globe? Can you customize the solution as your needs change? Can you integrate with complex back-office and ERP systems if needed?

### Put it to action:

- ✓ Make sure your customer service solution supports the customization you might need.
- ✓ Look at your worst case scenario and make sure you can support the case volumes and API transactions that would be required.
- ✓ Plan what business metrics you need to measure in the future and make sure you can support them.





# Your partner in growth: Salesforce

Rapid growth is every small business's dream. To make sure your company easily scales, be sure to make a plan for every aspect of your business, not just new features. With a customer service roadmap, you can always be sure the service you back your products with is as good as the products themselves. And that's a reason to celebrate.

Salesforce helps you find customers, win their business, and keep them happy so you can grow faster than ever. With Salesforce's out-of-the-box solutions, small businesses can easily implement cutting-edge technology and connect everything they use to run their businesses. On average, customers using Salesforce have seen a 38% faster decision making, a 25% increase in revenue, and a 35% jump in customer satisfaction\*.

To learn more about how Salesforce can help your business, visit: [salesforce.com/au/smb](https://salesforce.com/au/smb)

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\* Average percentage improvements reported by Salesforce customers. (Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.)



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