

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

salesforce

A woman with blonde hair in a blue shirt stands behind a man with dark hair in a blue checkered shirt who is sitting at a desk and typing on a laptop. They are both looking at the laptop screen. The background is a bright office with large windows and a wooden easel.

20 CUSTOMER SERVICE BEST PRACTICES

HOW TO DELIVER EXCEPTIONAL SERVICE

A network of blue lines and dots connects various social media icons including Facebook 'f', Twitter birds, and a plus sign. The icons are scattered across the bottom half of the image, with some overlapping the laptop and the man's hands.



We are firm believers in putting the “customer” back in “customer service.”

The world has changed. People and devices are more connected, customers are more informed and empowered, and companies have more data at their fingertips than ever before. We have entered the age of connectivity, where digital-savvy consumers expect a connected, responsive, frictionless customer experience. The future of business success depends on whether companies can deliver a customer experience that meets their rising expectations in this new, hyperconnected world.

Yet when it comes to customer service, many businesses are stuck in the past. That’s why we’ve created this e-book: to equip you with the core best practices of excellent customer service so that your business can succeed in the age of connectivity. Using feedback from our customers, product experts, and thought leaders, we’ve pulled together 20 customer service best practices, with five aimed at great service across channels, five around treating your customers well, and 10 focused on building a world-class team. Let’s take a look.

Table of Contents

Great Service Across All Channels

- 1 | Know Your Customers, Wherever They Are
- 2 | Leverage Customer Information
- 3 | Use the Channels Your Customers Prefer
- 4 | Go Mobile
- 5 | Provide Omni-Channel Training

Treat Customers Like Friends

- 6 | Share Helpful Content
- 7 | Keep It Real
- 8 | Turn Setbacks Into Solutions
- 9 | Leverage the Experts
- 10 | Follow the Regulations

Build Your Team

- 11 | Start With the Interview
- 12 | Hire for Culture Fit
- 13 | Think Beyond the Cubicle
- 14 | Implement Gamification
- 15 | Use Multiple Channels to Reduce Monotony
- 16 | Allow for Flexible Scheduling
- 17 | Frame the Job in a Meaningful Way
- 18 | Reward Success
- 19 | Give Regular Feedback
- 20 | Provide Opportunities for Growth

A background image showing a business meeting. A man in a suit and tie is looking down at a document. Another person's hand is holding a pen over the document. The image is overlaid with a blue gradient on the left side.

Section 1

Great Service Across All Channels

Technology has transformed the modern customer into a multi-screen, always connected, highly opinionated force in the business world. If your customer service isn't prepared to deliver exceptional service across multiple channels and devices, you are going to miss the opportunity to service your customers effectively.

Your customer service needs to not only keep pace with your customers, but be out ahead, waiting for them to arrive. This means embracing new channels and using data to create a more complete picture of your customers than ever before.

Great Service Across All Channels



Know Your Customers, Wherever They Are

Customers often report lower satisfaction when companies force them to visit multiple channels to resolve their support issues. Make sure your agents know your customers well, including what they want, their history with you, their preferred communication channels, etc. That way, if customers begin a conversation on email, they don't have to start over if they switch to phone or live chat.



Leverage Customer Information

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



Use Channels Your Customers Prefer

When a new customer arrives, that's the time to find out which channels they prefer for service assistance. As part of your on-boarding process or welcome call, have your agents ask which channels customers prefer to use for service issues. If part of your on-boarding includes a welcome email, include a handy "cheat sheet" of all of your service team's contact channels. As well, include calls-to-action in your marketing content asking customers to connect with you on their preferred mediums.



Move Toward Mobile Customer Service

Mobile options, such as text messaging, aren't a dominant channel for most contact centers, but companies need to start thinking about it as a service option. Mobile offers a platform that's always with the customer, and offers a real one on one feel. Does your customer service center consider other options for customers to connect, like mobile and beyond?



Provide Omni-Channel Training

Your agents won't become multichannel masters overnight. As you add service channels, your customer support agents need to be trained on how to use them effectively.

Staffing different channels means finding the hidden strengths of your existing service agents. Look at your team's previous experience, and actively solicit writing samples to find your team's most proficient writers. Make certain they're trained and ready to respond to your customers on channels that require written responses, such as email.

Section 2

Treat Customers Like Friends

Good customer service experiences answer a customer's question. Great customer service experiences provide something more. Companies that are creating real competitive advantages with customer service are providing real human interactions that surprise, delight, amuse, and educate their customers.

The days of stodgy, script-based interactions are fading fast. Customers just want to interact with a real person, and get real help with their issue. Enable customers to educate themselves and feel like they are helping make real improvements to your business.

Treat Customers Like Friends



Share Helpful Content

To empower your customers, you must help them become sources of knowledge. Useful content — whether it's a blog post, webinar, social post, or white paper — can help solve your customers' issues while enabling them to easily share this information with others.

To use content effectively, maintain a constant dialogue with your customers to ensure the content you're creating and sharing is helpful, shareable, and relevant to their needs and challenges.



Keep It Real

It sounds obvious, but staying away from canned responses and ensuring every interaction is authentic are critical to successful customer service. Train your customer service teams to be genuine, and encourage an open and candid tone with customers. If your customers feel comfortable, they will speak honestly — which helps you solve problems faster.



Turn Setbacks Into Solutions

Unfortunately, many companies will have customers who like to gripe. Customer service provides a place for them to let off steam. Remember, this can be a very positive and productive development, helping current customers, as well as your product teams, understand product capabilities and limitations. Ensure your team treats every complaint as an opportunity to make your organization even better.



Leverage the Experts

Encourage your agents to collaborate directly with the external experts in your industry. Choose experts that are devoted fans of your products, highly engaged, and ready to help others get the most out of your offerings to create even more highly satisfied customers.



Follow the Regulations

Ensure that with any customer interaction, industry regulations are followed. This can be particularly important when adding new channels, such as a contact center adding a live chat option that may be used to collect credit card data from customers. It's crucial to ensure that this new option and your procedures are still in compliance with all regulations, and that the required organizational policies are established and enforced. Implement solutions for quality management that fully comply with industry standards.

Section 3

Build Your Team

The success and failure of any customer service department rides 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 handicap your ability to provide adequate service right from the start.

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



Build Your Team



Start with the Interview

During a session at 2013's Call Center 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!



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.




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.



Implement Gamification

There is a 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 realtime contests, reps can engage with colleagues, strengthening your company culture and improving center morale. Gamification brings an element of fun to an occasionally monotonous job.

A photograph of three business professionals in a meeting, overlaid with a semi-transparent blue filter. The individuals are looking at documents and a tablet. The scene is brightly lit, likely from a window on the left. The blue overlay is most prominent on the right side of the image, where the title and text are located. There are also some blue geometric shapes (a vertical bar on the left and a circular shape) overlaid on the lower-left portion of the image.

Leverage Multiple Channels to Reduce Monotony

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.

Build Your Team



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 recognizes 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.



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.



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 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.



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.



Provide Opportunities for Career Growth

A lack of career opportunities is often one of the top reasons for leaving a job. Experienced, top performing support agents often feel like they've hit a glass ceiling in a contact center. Try allowing these agents opportunities to try out new roles, even temporarily.

This can be achieved through shadowing, or "day in the life" type programs. If you offer educational opportunities, your agents could soon be developing knowledge and skills that may make them attractive to other parts of the company, such as training, sales, or marketing. Be sure to stay on top of your best people, find out how they're feeling and if they're still motivated in their current role. Are they interested in a management position?

20

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 Cloud¹ – built on the Salesforce Customer Success Platform – any company can deliver a customer service experience that is more personalized, 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.

SERVICE SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

Delivering amazing customer service is at the heart of what it means to be a Customer Company and connect with your customers in entirely new ways.

34% Increase in customer retention

38% Decrease in case resolution times

39% Increase in agent productivity



The information provided in this e-book is strictly for the convenience of our customers and is for general informational purposes only. Publication by salesforce.com does not constitute an endorsement. Salesforce.com does not warrant the accuracy or completeness of any information, text, graphics, links or other items contained within this e-book. Salesforce.com does not guarantee you will achieve any specific results if you follow any advice in the e-book. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor or professional engineer to get specific advice that applies to your specific situation.

© 2014 Salesforce.com. All rights reserved.



THE CUSTOMER SUCCESS PLATFORM