



zendesk

A guide to multi-channel customer support

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Introduction

Just ahead through the double doors is the customer service department. Behind a neat, circular desk, a tidy line of customers waits patiently—or perhaps not quite so patiently—for their questions to be answered. A man with a checkbook in his shirt pocket narrows his eyes at the woman talking, *ad nauseam*, to the customer service representative. From the safety of her too-large purse, a small dog growls at the man. The man growls back. He's irritated. He's going to be late for a meeting, it's growing warmer by the minute, and already he feels the day slipping through his fingers...

This is a simple, if not human, snapshot of the bygone era of one-to-one customer service. Customers came to you when your doors were open, and chances were you knew their names: Henry, Mathilde, and little Fluffy.

Nowadays customer service is a lot more complex, and it can be hard to meet the ever-shifting expectations of consumers. But do we really miss the good old days?

CHAPTER ONE

The times, they are a-changin'

Today your door is always open, and both you and your customers can decide how best to have a conversation. Multi-channel simply means that there's more than one way for customers to reach out to you for support—by phone, email, live chat, social media, and lightweight self-service options such as knowledge bases and online communities or forums.

The modern day Henry carries a smartphone in the back pocket of his jeans. He scans the news while waiting to buy lunch and remembers a question he had for your support team. He begins tapping out an email, but gets distracted. Instead, when he's back at his

desk, he initiates a live chat session. Henry might actually be a perfect example of [a customer who'd prefer to help himself](#).

Here's the thing: Henry is just one customer among many, and he isn't thinking about customer service in terms of a multi-channel strategy. He just wants it to be easy to get a quick answer to his question, and he's got the tools on his end to make that happen. The question is: Do you?

Customers both want and expect to have the ability to contact businesses in more than one way. Beyond that, they want the experience—including the quality of service and the information they receive—to be consistent no matter which method they use to reach you.

More than likely, you're already providing multi-channel support, but how many channels are you offering, and are they

the right channels? How can you know which are the most efficient for your organization? Different channels offer different benefits, and your customer demographics may favor one channel over another.

In this guide, we will:

- Take an in-depth look at what multi-channel support entails
- Examine how a multi-channel strategy improves efficiency, agent productivity, and increases customer satisfaction and loyalty—all of which impact your bottom line
- Cover some practical strategies to help implement and optimize this approach through the use of a unified platform

CHAPTER TWO

The challenge: Proliferating channels and requests

Technology has introduced new communication channels, and will continue to. Technology has also continued to evolve the hardware these channels are accessed through. For instance, the rotary telephone became the mobile phone, and today contact centers can provide voice support without using a phone at all, through the Internet. On top of this, your customer base is growing, and you're handling more requests than ever.

As your channel options multiply, new questions are raised:

- How can you foster meaningful customer relationships across multiple channels?
- What's the right number of channels to support? Do you really need that many?
- How can you decide which channels are the best to offer?
- How should you allocate agents? Are they dedicated to a single channel or blended across a few?
- How can you forecast growth and scale for demand by channel?
- And, how on earth can you ensure that the customer experience is consistent?

These are all really great questions.

The truth is that newer channels don't necessarily replace the tried and true. Even as businesses and customers adopt emerging technologies, research consistently shows that email and phone still claim the lion's share of today's support requests.

Since each major channel—phone, email, chat, social media, and self-service—receives its own measure of requests, customer service organizations find they need to offer a combination of the following types of communication:

- **One-to-one:** one support agent helps one customer at a time, generally by phone, email, or in-person/in-store
- **One-to-many:** one support agent helps multiple people at a time, through live chat, video chat, or SMS text messaging, or where there is a single resource, such as a knowledge base or FAQs, available to customers
- **Many-to-many:** there are multiple means of reaching many people, often through online forums or customer portals, and social media sites such as Facebook and Twitter, where customers and agents can all participate in the conversation

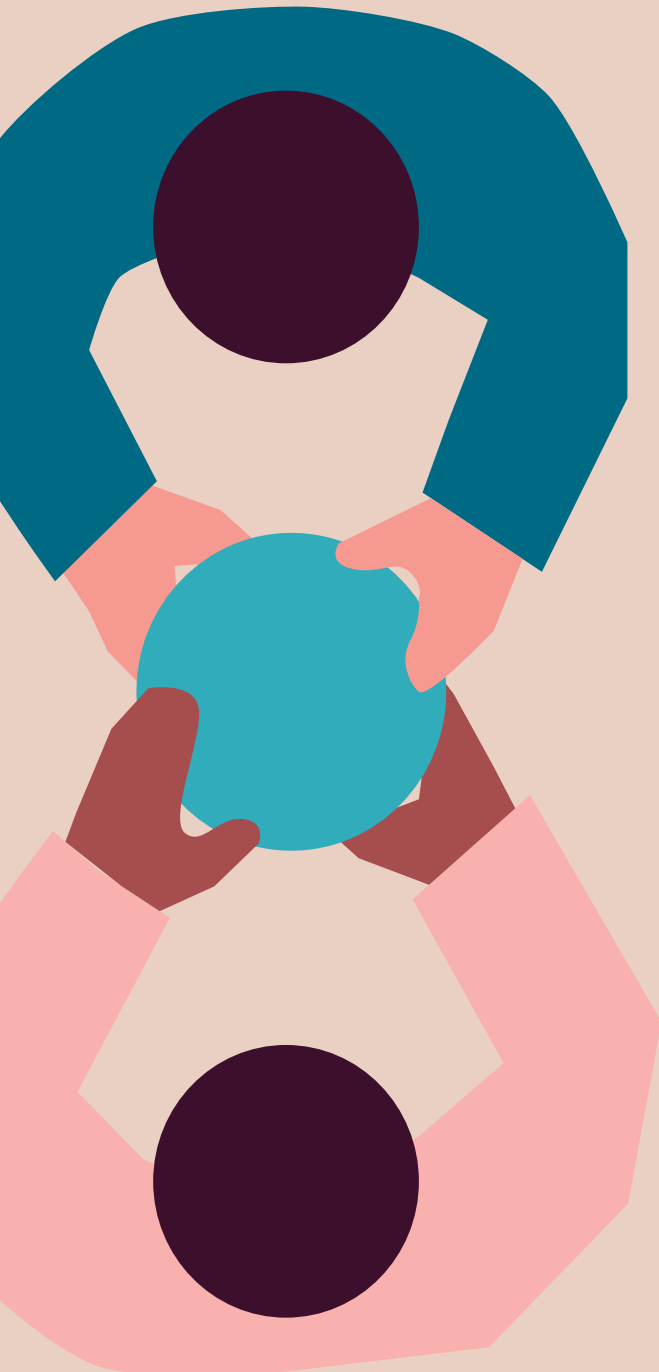
Support has not moved in a simple, linear progression from one-to-one to many-to-many. All three types of communication are relevant and serve the customer concurrently. So rather than allow the proliferation of these channels to overwhelm or splinter your support operations, you can harness them to improve efficiency across the organization. For example, newer many-to-many channels can help with deflection of inquiries so that agents are freed up to handle the trickier one-to-one exchanges.

Mobile devices, multiplying like rabbits

On the hardware side, both customers and support agents are doing more on mobile devices than ever before, and everyone is moving between laptops, tablets, and smartphones in their personal lives and at work—whether or not this is officially sanctioned. Support agents may even use their personal

social media accounts when resolving customer issues simply because the mobility and the accessibility makes their job easier.

As mobility is the new norm, setting up your organization to have the flexibility to work across multiple platforms and channels—by selecting software that allows for seamless use across devices—is key to setting your agents up for success, and to help ensure a more consistent customer experience.



CHAPTER THREE

Benefits of a multi-channel strategy

Rather than allow the proliferation of channels to overwhelm your customer support operations, you have the chance to take advantage of them. Handled appropriately, a multi-channel strategy offers many benefits. Mishandled or disregarded, you run the risk of being out of touch and at a competitive disadvantage.

You've no doubt heard the phrase: "Nothing ventured, nothing gained." Opening up as many as six or seven channels of support isn't as risky as it might sound. There are indisputable benefits to offering support through multiple channels that include contact

deflection and improved efficiency, increased sales opportunities, improved customer satisfaction, and a chance to drive long-term growth through customer loyalty.

Improve efficiency with contact deflection

A key benefit of multi-channel support is the ability to deflect excessive one-to-one contacts through [self-service options](#), as well as to reduce the volume of contacts coming in through the most costly channels.

Customer example: Animoto

Zendesk customer Animoto experienced this when they implemented a web self-service channel. They saw an increase of 300% to 400% in customer traffic to their knowledge base, while the number of emails and tickets declined.

Contact deflection directly impacts your bottom line, perhaps saving as much as several dollars per contact. It also opens up time for agents previously bogged down by high volumes on a single channel. An Astute Solutions article on optimizing customer service states: “By segmenting and directing customer requests to appropriate channels, organizations expedite access to information, while reducing the burden on more costly service-based resources.”

“The more avenues a customer has to reach you, the more traffic you’ll see.”

Increase sales opportunities

Increased support opportunities can lead to increased sales opportunities. A multi-channel strategy isn’t just a reallocation task—moving existing volume from one channel to another.

It is merely expanding upon the system you already have set in place. Put another way, if you have four rivers feeding into the ocean, and then remove a dam blocking a fifth river, the ocean level

will rise. The same is true with customer requests. The more avenues a customer has to reach you, the more traffic you’ll see. Being more available and meeting customers via the communication method they prefer offers a chance to build more, and better, relationships.

A unique aspect of social media channels is that these opportunities to build relationships happen in the public. At

Zendesk we have seen some of our customers receive 95% more mentions on Twitter than in email requests, giving them access to an incredible amount of feedback and exposure to—and a chance to influence—larger networks of people. This is free marketing! But driving proactive conversations through proactive chat, or outbound calls, can also contribute positively to your bottom line, as we’ll explore.

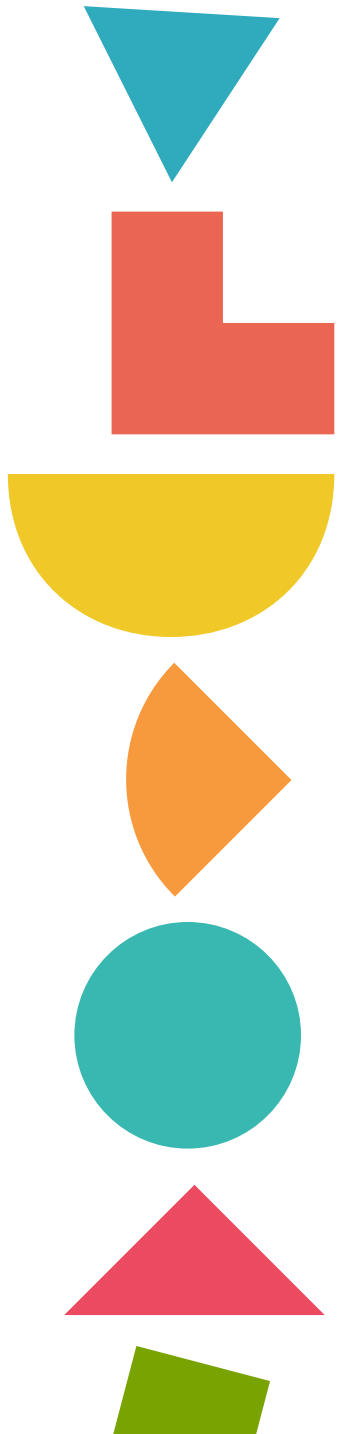
Raise the roof on customer satisfaction

Email, phone, and chat support are all reactive channels. Agents must wait for the customer to initiate the interaction, and then respond immediately—usually when there’s already a problem. Phone agents, for example, have less than thirty seconds to answer a call. Yet technology makes it possible to track a user’s activity and location on your website in real time. Agents can invite a customer to chat, perhaps if they abandoned items in their cart, and possibly save the sale. Sales benefits aside, what’s key here is that the agent reaches the customer before the point of frustration.

A 2012 [benchmarking study](#) by BoldChat found that visitors who engaged in proactive chats were eight times more likely to make a purchase than regular website visitors. They were also more satisfied. [Research from the e-tailing group](#) stated, “Interestingly, we learned that the

practice of inviting website visitors [to chat] can impact the visitor’s expectations of the subsequent chat, making their satisfaction score even more impressive.” Of those who engaged in a proactive chat session, 89% gave a positive satisfaction rating after the chat concluded. The challenge here is to mitigate your approach, so that consumers don’t feel you’re too invasive.

A [2012 study by the Aberdeen Group](#) also reported that businesses following a multi-channel customer support strategy had a year-over-year improvement in customer satisfaction more than double that of their peers who provided support through a single channel (9.7% vs. 3.9%).



Drive long-term growth through customer loyalty

The more competition there is, the more choices a consumer has, and [the more difficult it becomes to build and maintain customer loyalty](#). That's simply today's reality.

When you don't engage customers through the channels they already use, you're not only missing out on sales but also missing chances to create good experiences. Loyalty comes from having a longer-term vision rather than going after short-term wins by offering things like price discounts. Essentially, loyal customers become brand advocates, and brand advocates spend more, buy more frequently from your brand, and evangelize your product to other potential clients. That's the kind of marketing and advertising you can't put a price on.

Companies who invest and excel in the customer experience outperform those who don't. [Watermark Consulting](#) looked at the total returns for two model stock

portfolios comprised of the Top 10 and Bottom 10 publicly traded companies in Forrester Research's annual [Customer Experience Index Ranking](#). Analysis of data from 2007 to 2012 revealed that the leaders in customer experience outperformed the broader market, with a total return of, on average, three times higher than the S&P 500 Index.

As customers expect more and more from companies, the gap between those who listen to customers and provide great experiences, and those who don't, will continue to widen.

CHAPTER FOUR

Which channels do customers want?

“The findings suggest that consumer expectations around SLAs are a primary driver behind ‘preferred’ communication channels.”

Aberdeen also reported that over half of the contact centers they surveyed—a contact center being any organization offering two or more channels—were already offering support through six channels. Nearly all participants were providing phone and email support, as well as some type of web offering. Seventy-six percent provided an interactive voice response (IVR) and support by mail or fax, and 55% by social media.

It can be tough to know whether customers prefer a particular channel because it’s their ideal preference, or because other options are terrible, even nonexistent. Expectations around response time, or a previous experience with a particular channel, can bias a customer. Choosing your support channels is one of those decisions that should be data-driven. We can share the research, but only you know your customers.

[Research conducted by Loudhouse](#) revealed that the phone is still the primary channel customers use to interact with

customer service organizations. This is because consumers believe that voice support is the quickest way to get their problem solved. Nearly three in five people (59%) expect a resolution within thirty minutes by phone, whereas 52% expect a resolution within a day via social media. The findings suggest that consumer expectations around SLAs are a primary driver behind ‘preferred’ communication channels.

The phone’s predominance is declining as the use of other channels increases, but still the phone proves to be a dependable fallback. Research found that when a first call goes unanswered, 54% of customers will try using the phone a second time. When an email goes unanswered, 71% will try the phone next. When there’s no response over social media, 55% revert to phone support.

It means that customers don’t want to give up voice support. Yet the numbers don’t suggest that they want to rely on it, either.

75%
of respondents
think self-service is
a convenient way to
address problems

Consider also that a [Dimension Data 2013/14 Global Contact Centre Benchmarking Report](#) revealed that Generation Y is moving away from the traditional phone—it's their fourth channel choice behind electronic messaging, social media, and smartphone apps. Though Generation X still trends toward the phone as their first choice, their preference for electronic messaging is close behind (46.3% vs. 44.1%).

The research suggests that looking at your demographics is one way to determine which channels of support you should offer. A [2013 study](#) from BT and Avaya found that live chat is the fastest-growing channel, and that of those surveyed, 55% were even interested in live video chat. It's a lot to keep up with.

Going back to the idea that a customer's preference between channels depends on the quality of experience, [research also shows](#) that as many as 91% of consumers would use a knowledge base or help center if it were tailored to meet their needs.

What does that mean? Customers want a good self-service option, with thought behind the design. They want to be able to search a company's site in the same way they're used to searching the Internet. Answers to frequently asked questions should be easy to find, and the knowledge base should be fine-tuned and optimized in response to data on what customers are actually looking for.

Results from a [consumer survey](#) by Nuance revealed that 75% of respondents think self-service is a convenient way to address problems, and 67% said they preferred helping themselves to having to speak to a customer service representative.

Channel Preference

Silent Generation

(Born before 1944)

PHONE

55.6%

ELECTRONIC MESSAGING

6.6%

SOCIAL MEDIA

0.7%

SMARTPHONE APPS

0.3%

PAPER MAIL

17.2%

DON'T KNOW

38.0%

Baby Boomers

(Born between 1945 - 1960)

PHONE

59.6%

ELECTRONIC MESSAGING

22.5%

SOCIAL MEDIA

3.5%

SMARTPHONE APPS

3.0%

PAPER MAIL

13.4%

DON'T KNOW

33.8%

Generation X

(Born between 1961 - 1989)

PHONE

46.3%

ELECTRONIC MESSAGING

44.1%

SOCIAL MEDIA

20.7%

SMARTPHONE APPS

17.2%

PAPER MAIL

9.6%

DON'T KNOW

33.4%

Generation Y

(Born after 1990)

PHONE

29.4%

ELECTRONIC MESSAGING

42.3%

SOCIAL MEDIA

36.4%

SMARTPHONE APPS

31.9%

PAPER MAIL

5.9%

DON'T KNOW

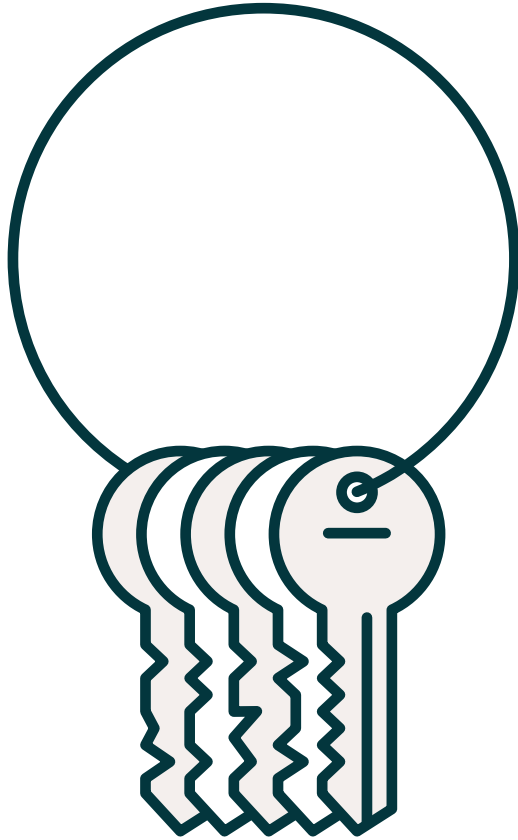
33.1%

CHAPTER FIVE

Optimizing multi-channel support

Customers want you to provide multi-channel support, but they can be harsh critics about the support they receive through each channel. In order for multi-channel support to be effective, agents need tools and training that will help them manage volume and SLAs across channels. Aberdeen reported that one of the top challenges faced by companies is the use of separate applications to manage requests across channels.

Companies need a strategy for establishing, maintaining, and integrating customer support channels. It's not enough to open the door if no one is there to greet the customer. With this in mind, it's good to be wary about opening the support floodgates and spreading your



organization too thin. Opening new channels increases contacts; it also raises expectations that you'll provide better service. This is a good thing, but your organization must live up to it.

To optimize and benefit from multi-channel support, you will need:

- Unified tools and processes
- Cross-channel communication (e.g., when a request moves from email to phone, or from social media to email)
- A strategy for monitoring volume and engagement
- At least one live—or very humanized—channel

Unified tools and processes

Effective multi-channel support requires the ability to capture all requests in a unified tool. Having one agent responding

to email in one system while another tweets from a different system can lead to that classic problem where the right hand doesn't know what the left is doing—which is all too often the case. As reported in [The Cross Channel Customer Experience from Genesys](#), “[w]hile many enterprises have accelerated their implementation of select, new communication channels, very few have tied them together into a complete system of customer care.” This results in a scattered, reactive organization, unable to reap the benefits of multi-channel support.

A central tool and set of business processes allow requests to arrive through different channels, but treat them all the same, on some level, within the tool. For example, imagine every single customer interaction captured in a ticket—including tweets and messages and posts on Twitter and Facebook. This keeps things simple from the agent's perspective. The ticket can capture all data you have on the customer, including their entire support history, allowing the agent to consider the channel and then decide how to respond.

“As exciting and new as emerging social channels are, supporting customers via social media requires the same underlying processes as traditional channels.”

—John Ragsdale

Vice President of Technology
Services Industry Association

With requests from every channel creating tickets in a single customer service platform, the experience for customers is seamless, consistent, and more personal. It also results in faster resolution time for agents.

Other benefits of using a unified tool include:

- **Nothing falls through the cracks:** by reducing the number of places your organization needs to monitor, agents can be more efficient
- **Consistency and cohesion:** a single tool ensures cohesion in support philosophy and goals, and makes it easier to be consistent. A report on multi-channel support found that “inconsistencies—like different product information in different channels—only serves to confuse and frustrate your customers.

Use the same language and provide customers with the same information no matter what channel they’re in.”

(Source: Forrester: “Cross-Channel Design, One Channel Pair at a Time”)

- **Lower switching costs:** with fewer tools, agents become more focused and incur less switching costs than when trying to use and monitor multiple tools
- **Transparency:** even when different agents are handling different channels, tickets collected in a single tool can be viewed by everyone. This is especially useful when customers make multiple contacts about a single issue using multiple channels.



Cross-channel communication

Customers are often switching between channels when interacting with your company. They may use one channel to research or buy a product, and another to request service. They may email with a question, and then call before an agent can respond. Or perhaps they tweet at you, and an agent moves the conversation to email. Without a unified tool, you risk tracking one continuous customer journey as separate interactions. Confusion on the support side of things will no doubt result in frustration for the customer.

For this reason, it's important that any data you collect on your customer's interactions travels with the customer. This is often a technology problem—a chat system can't talk to your ticketing system—further reinforcing the need for a unified customer service platform.

Not only should your customers be allowed to move across channels, but your channels should also be connected so that data flows easily between them.

The sweet spot between monitoring and engagement


We've covered how and why to centralize and integrate multiple support channels, but it's also important to recognize that each channel is different and will require individual treatment and strategy.

Consider how proactive you want to be, or whether it's okay to only provide reactive support. How frequently will you monitor social media, and what are your expectations around responding to email versus a Facebook post? Will you set up alerts or business rules to help agents meet response time goals? Can your


“By empowering our customer team to identify and resolve service issues using a single platform, we’re putting the emphasis on the customer experience, regardless of the communication channel used. We recognize that to support our mission to improve access and satisfaction for our customers, we need a solution designed specifically for the internet that can integrate with social media channels.”

—Mike Bracken

Executive Director,
Government Digital Service, Gov.uk



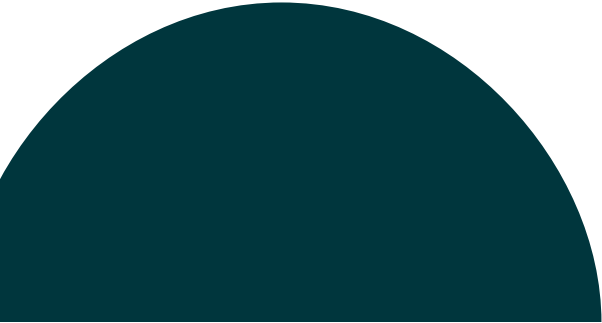
“the more customers can do on their own on the web, the more live support becomes relevant”



marketing, social media, and support teams work together to elevate the experience by creating consistent messaging across all brand communications, from email auto-responses to IVRs to customized replies? Your company’s rules of engagement relate directly back to your brand identity.

Keep it human—balance live and self-service options

While self-service and email support are often enough to resolve customer issues, supplying a live channel—chat, phone, or even Twitter—is critical. It may seem counter-intuitive to increase live support at the same time you’re offering self-service options, such as a well-populated knowledge base or thriving customer forums, but the more customers can do on their own on the web, the more live support becomes relevant. There must be a way for customers to reach a human when they cannot resolve their issue through self-service or a delayed email interaction.





Keep in mind that consumers are still reverting back to phone support when their first attempt to get help is unsuccessful. Today, frustration and delays lead to public venting over social media, and spreading the wrong message via word of mouth. Word of mouth, incidentally, [retains the most impact](#) over purchasing decisions.

Are we talking about multi-channel or omnichannel?

Both—omnichannel is the natural progression of multi-channel support, rather than a competing support strategy. Multi-channel refers to providing support through more than one channel, while omnichannel goes a step further by integrating those channels and unifying the customer experience.

So far, most organizations are a long way from managing a successful omnichannel strategy. Research from [BT and Avaya](#) revealed that only 17% of consumers say that companies have made it easy to switch between different channels. Similarly, a [report commissioned by Zendesk](#) found that only 7% of online shoppers are “extremely satisfied” that brands provide a seamless, integrated and consistent customer service experience across channels.



CHAPTER SIX

Looking back—err, forward

The history of the customer service desk is an evolving story. The digital age has done anything but make customer service irrelevant. Instead, support is closely tied to the entire customer journey and more necessary than ever. Modern day Henry has high expectations. He expects to get help fast, no matter how he contacts your business. And he expects the quality of service to be consistent across each communication channel.

The personal touch should never be underestimated. As time-consuming and expensive as live support is, it is one of the most effective routes to resolution

and a happy customer. But offering a mix of channels, including self-service options, requires fewer live support agents. This is more cost-effective and also leaves your skilled agents more time to spend with customers.

To improve the customer experience in a systematic and sustainable way, it's vital to remain open to new ways of interacting with customers. A flexible, open tool, designed for a multi-channel strategy can help you build relationships. And the relationships matter as much as the customers do.

Want to see a demo of how Zendesk can help with a multi-channel strategy?

[Click here!](#)

