



# Your guide to omnichannel customer support



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Your door is always open, regardless of your business or support hours. Today's customers ask questions at any time of the day or night and will wait for you to respond (but not for long). How customers do this varies—sometimes the customer is standing in line somewhere, browsing their mobile phone. At other times, the customer is in front of their computer while at work, focused on three other tasks. Every now and again, the customer's issue is urgent, and they need to reach you right away.

Unless you've limited channel options, the customer will determine the best way to engage with your company based on their needs and preferences. This poses a challenge to most businesses: How can you anticipate which channels a customer will need or want, and how can you determine whether these channels will be efficient for your organization? You might wonder whether you really need to offer support through multiple channels.

The short answer is: you do. And that's what this guide is here to explore. Customers want the ability to contact businesses in more than one way, and they expect each brand interaction to be consistent with the one before and after. So, beyond offering support through more than one channel, customers expect a fluid channel experience, where each channel connects to the next and every agent knows which channels the customer has already tried.

That's what omnichannel support offers. Customers can engage how they see fit, and you can manage multiple channels with ease. An omnichannel strategy and support solution allows you to do more than just meet your customer's expectations—you can exceed them by personalizing each interaction. It goes a long way to say, "Hi, I see you've emailed this morning."

### If that sounds intriguing, keep reading this guide to learn:

- What omnichannel support entails
- How an omnichannel strategy can benefit your business
- What factors are driving channel preferences
- How to build an omnichannel strategy that considers each channel, and all channels, at the same time

The challenge

# 01 Too many channels to manage



New or smaller businesses often face a conundrum when thinking about channel selection and management. The number of communication channels available, accessible across devices, can feel overwhelming. The most obvious choice might be to choose one, maybe two, channels and funnel all customer contacts through them.

Larger and more mature businesses face a different challenge. Once you've built out your support structure, adding support through the latest emerging channel often requires a change in infrastructure. The solution is typically to purchase a new tool, one that isn't connected to the systems and tools already in place.

It's usually at times of growth, or needing to re-envision the customer experience, that channel questions are raised—exactly when you're handling more requests than ever before. Chances are, you're faced with tough questions like these:

- What is the right number of channels to support?
- Which channels do my customers actually want?
- When should I add these channels? In what order?
- How can I staff these channels and forecast shifts in volume?
- How should agents be allocated? Are they dedicated to singlechannel or blended across a few?
- How can I ensure consistency across channels?

# Consider channel reach

Every channel that customers engage your business through will see a different volume of requests, so it's important to think through the efficiencies of the following types of communication:

One-to-one	One-to-many	Many-to-many
<p>One support agent helps one customer at a time.</p> <ul style="list-style-type: none"> <li>• <b>Brick-and-mortar in-store help</b></li> <li>• <b>Phone</b></li> <li>• <b>Video chat</b></li> </ul>	<p>One support agent helps multiple people at a time.</p> <ul style="list-style-type: none"> <li>• <b>Email</b></li> <li>• <b>Webform</b></li> <li>• <b>Live chat</b></li> <li>• <b>SMS</b></li> <li>• <b>Messaging apps</b></li> <li>• <b>Social media</b></li> <li>• <b>Self-service help center</b></li> <li>• <b>Bot</b></li> </ul>	<p>Opportunities for agents and customers to participate in a larger conversation and help each other.</p> <ul style="list-style-type: none"> <li>• <b>Online forums</b></li> <li>• <b>Review sites</b></li> <li>• <b>Social media</b></li> <li>• <b>Customer communities</b></li> </ul>

Although support used to always be one-to-one, we haven't moved in a simple, linear progression from one-to-one to many-to-many. Today, all three types of communication are relevant and can serve the customer concurrently.

Rather than allow the proliferation of channels to overwhelm or splinter your support, you can harness them to improve efficiency across the organization. For example, some of the channels that fall under one-to-many or many-to-many can help to deflect inquiries and free time for agents to handle more of the trickier one-to-one exchanges.

## Don't forget your mobile strategy

As you plan your channel strategy, you have to consider: Does it translate to mobile? It's no secret that customers are doing more on mobile devices than ever before. For this reason, some channels may be best for mobile-first customers, such as SMS or Facebook Messenger.

If your business or service offers an app, consider whether you can provide the same support experience and channels through the app as on the web. Embedding support within the app makes for a better customer experience, so that the customer doesn't have to exit the app to go looking for help on a mobile browser.

# 02 The benefits of an omnichannel strategy



More channels provide more opportunities to connect with your customers—in the places they expect you to be. An omnichannel strategy—rather than a disjointed, multi-tool, siloed multi-channel approach—integrates all channels and provides customers with choices while keeping all conversations connected through a central hub and shared history.

Among the benefits of omnichannel support are opportunities to reduce the number of contacts that require a human touch, thereby improving efficiency, increasing sales opportunities, and leading to higher customer satisfaction and a chance to drive long-term growth by impacting customer loyalty.

## Deflect contacts with self-service

A key benefit of omnichannel 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. Consumers looking to help themselves expect to see relevant, well-maintained [self-service options](#), like a help center, on your site.

Forrester reported in 2016 that [self-service is on the rise](#)—both online and via mobile. Use of help centers or FAQs on a company website jumped from 67% in 2012 to 81% in 2015 among U.S. online adults.



Customer example

Zendesk customer Evernote built a help center using Zendesk Guide. The company's help center helps Evernote serve its massive base of freemium customers and is key to reducing ticket volume. With Zendesk Guide, Evernote has seen a self-service ticket deflection rate of 17 percent.

## Increase sales opportunities

Support interactions lend valuable customer insights to an organization, and so the more support interactions you have, the more data you can collect and use to drive change within the company.

Key to this, however, is having the ability to capture interactions across channels within a unified solution and to provide that valuable customer feedback and data with other teams or departments like sales, marketing, and product. Add to this, proactive engagement channels like live chat are great opportunities to help other teams adopt a growth mindset and to better identify or target retention, cross- and upselling opportunities.

Consider, too, that a unique aspect of [social media channels](#) is that opportunities to build good customer relationships happen in the public, offering the chance to positively influence larger networks of consumers.

## Raise customer satisfaction

Some channels naturally lend themselves to higher satisfaction ratings. Phone and email are reactive channels that customers typically use when there's already a problem.

Of course, a great satisfaction rating is a by-product of a great interaction, but the ease with which a customer can access help helps, too. This is one reason why [live chat consistently earns the highest satisfaction ratings](#).

Live chat has the benefit of being reactive if the customer has an issue, but is also an easy method for answering pre-sales questions. Live chat can also enable proactive outreach, helping with cart abandonment or just to check-in with a customer before they have to go looking for help. A chat widget that allows for embedded self-service content goes a step further by helping customers find an answer to their question before even connecting with an agent.



## Drive long-term growth through customer loyalty

The more competition your business has, and the more choices a consumer has, and the more difficult it becomes to maintain customer loyalty. That's simply today's reality.

Loyalty comes from having a longer-term vision about the customer relationship—rather than going after short-term wins by offering things like price discounts. Loyal customers have the confidence that even when something goes awry, your company can be counted on to make it right. When interactions are easy and customers can get help when they need it, they become brand advocates—and brand advocates spend more and buy more frequently from your brand, helping to evangelize your company to others. Loyalty leads to the kind of marketing and advertising you can't put a price on.

As customers come to expect more from the companies they engage with, the gap between those who are available to customers and provide great experiences, and those who don't, will continue to widen.



Channel trends

# 03 SLAs drive channel preferences



The [reasons customers choose to engage on particular channel](#) can vary. They might choose the most convenient channel in the moment, or prefer one channel over another based on the urgency or complexity of their issue. Some customers may always reach for the phone because they like talking to another human, while others are just used to emailing a question. It all depends on what options customers have to choose between. There's also bias to consider: expectations around response time, or a previous experience with a particular channel, may impact future choices.

The point: Choosing your support channels should be data-driven. We can share the research, but only you know your customers. The more you can leverage your software solution's analytics to understand how and when customers engage with you, the easier it will be to make channel decisions.

Even so, [research conducted by Loudhouse](#) revealed that the phone is still the primary channel customers use to interact with customer service organizations. There is an underlying belief that voice support is the quickest way to get a problem solved. For example, two-thirds of respondents (66%) expected an immediate resolution by phone, whereas 81% expected a resolution within two hours via social media.

These findings suggest that consumer expectations around SLAs are a primary driver behind "preferred" communication channels.

## When the phone rings and you don't answer

Loudhouse also found that the phone's predominance is declining as the use of other channels increases. Still, voice support is a dependable fallback. The 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.

**These findings suggest that customers don't want to give up voice support—yet the numbers suggest that they don't want to rely on it, either.**

## Quality of experience matters

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.

Customers want to be able to search your site in the same way they're used to searching the Internet, able to easily find the answers to common questions. A set of static FAQs is a thing of the past, though. Today's knowledge bases are fine-tuned and optimized to respond with relevant help articles as customers search, and your omnichannel solution may also be able to track which help articles a customer has already viewed or read, so that agents don't suggest repeat content.



# 04 Operationalize your omnichannel strategy



Customers want omnichannel support, but can still be harsh critics about the support they receive through any one channel. In order for omnichannel support to be effective, agents need a solution that will help manage things like volume and SLAs across channels.

Additionally, your omnichannel strategy doesn't, or shouldn't, require you to offer all channels at once—especially if you're not fully resourced for that. What it does require is a strategy for scaling. Plan for future growth from the outset by choosing a solution that allows you to turn new channels on and off as desired, without having to rebuild or retool your support infrastructure.

# Enable cross-channel communication

Without a unified solution, you risk tracking one continuous customer journey as separate interactions. This is often a technology problem—a chat system can't talk to a ticketing system, and confusion on the support side results in frustration for the customer. For this reason, it's important that data on customer interactions travels with the customer and moves as easily between channels as your customers do.

An omnichannel solution empowers customers to communicate through the channel that makes the most sense and allows them to move seamlessly between channels as needed, without disrupting the flow of conversation. This process can be made even more seamless by selecting a solution that allows you to embed or integrate all channel interactions into a single view, for a complete view of the customer.

An omnichannel solution should allow both customers and agents to move between channels with a view into the history of customer contact with your company, past satisfaction scores, and research the customer did on their own, on your site or help center, before they submitted a ticket.

## Find the sweet spot between monitoring and engagement

As beneficial as it is to centralize and integrate multiple support channels, 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. Ask yourself how frequently you'll monitor social media, and what your expectations are 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 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. An omnichannel solution should allow both customers and agents to move between channels with a view into the history of customer contact with your company, past satisfaction scores, and research the customer did on their own, on your site or help center, before they submitted a ticket.

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## Keep it human—balance live and self-service options

While self-service and email support are often enough to resolve most customer issues, offering a live channel—chat, phone, or even Twitter—is critical. It may seem counter-intuitive to increase live support at the same time you amp up self-service, but the more customers can do on their own, the more live support becomes relevant.

Customers need a way to reach a human when they aren't able to resolve their issue through self-service and can't wait for an email response. The personal touch should never be underestimated—remember that Loudhouse found that consumers revert back to phone support when their first attempt to get help is unsuccessful.

As time-consuming and expensive as live support is, it is one of the most effective routes to resolution and a happy customer. That's why it's nice to offer a mix of channels, so that you can retain live support, but with fewer live support agents. This strategy is more cost-effective and leaves skilled agents with more time to spend with the customers who need the most help.

The outcome

# 05 More channels lead to better intelligence

The right omnichannel solution allows you to be omnipresent—when and wherever a customer wants you to be—and connects everything you know about the customer in a central place.

And while an omnichannel support strategy can serve to shift existing volume between channels, it's not an exercise in reallocation. Instead, an omnichannel solution expands the breadth and reach of your support, allowing you to improve the customer experience in a systematic and sustainable way. It ensures that you'll never run into that classic problem where the right hand doesn't know what the left is doing. Moreover, once you're able to meet customers where they are or want to be, you can begin to anticipate customer behavior and engage proactively.

With the right omnichannel solution, interactions become simpler for the agent, as all customer data is captured in one place. With more context and the customer's support history to draw upon, agents can decide how best to respond, leading to faster resolution times. From the customer's view, a request made through any channel results in a seamless, consistent, and more personal support experience.

As you select the right solution for your business, consider your strategy around establishing, maintaining, and integrating new support channels. It's not enough to open the door if no one is there to greet the customer. At the same time, as you encourage more conversation, you also open your business to longer, better customer relationships.

Learn more about an omnichannel solution with Zendesk [zendesk.com/omnichannel](https://zendesk.com/omnichannel).