Gladly

A Practical Guide for Delivering Radically Personal Customer Service

What is "Radically Personal" customer service?

It's having the right options readily available to easily handle the issue in the first chat, message, or call.

Radically Personal service is when a customer reaches out and doesn't need to provide you with their pesky order number. It's connecting with a customer with alternatives when part of an order doesn't make it. It's being able to seamlessly switch the conversation to text message when a customer is unable to chat on the phone and it's understanding what's been happening with a customer before you even start the conversation.

But mainly, radically personal is cutting through the clutter of technology and processes that destroy your connection with people—by understanding the entire customer experience.

- All of their conversations with different people, on different channels, or even with self-service
- All of their purchases, all their payments
- All of their various interactions and history with your company and your brand

Getting radically personal requires new technology to get to an old idea—making service all about people.

Making customer service all about people feels like a big adjustment and it's only human to want to reduce risk when we make big changes—change is hard.

Assumptions based on managing older systems can be wrong-many things that used to be unrealistic are now possible as better solutions.

This is a practical guide to the challenges of getting to Radically Personal customer service and creating customers for life. The results can be spectacular for your customers, for your teams, and for your bottom line.

Gladly is here to help.

Do the best you can until you know better. Then when you know better, do better.

- Maya Angelou

How to create a lifelong conversation with your customers

When your customers contact you with an issue, they expect everyone on your team to know everything about them-including their history, orders, returns, loyalty points, and previous conversations. They don't care if John from Minnesota is helping them or Susan from Texas, from their perspective they are talking to one person—to your brand.

This is a steep climb when your customer is anonymous to your service agents (at Gladly we call them heroes), and their history is spread across many systems. Even worse, when you don't have all the information you are forced to transfer them to another service hero to help.

Collecting all the information they think you have can be a costly challenge. You want to help, and you see the value of customer satisfaction,

but if you don't understand the context of their last order correctly, that customer may think you're too busy to help them—or incapable of helping them—and that won't end well.

Bad systems trap agents in a prison of ignorance—incorporating a few of these easy changes is the first step to creating lifelong conversations with your customers and building radically personal customer service.

Putting people at the center of everything you do

Imagine calling your favorite brand because you haven't received your son's birthday present and the service agent-hero on the line says, "Hey Mike, are you calling about your recent sneaker order?" Gladly empowers your team to do just that, and then some.

With Gladly, service heroes can see who the customer is before they pick up the line to say 'hello.' They can see what a customer ordered last, how much they spend with you, how often they return things and what their VIP status is.

Goodbye to a world where customers need to do more work to get help with something they already purchased from you, and welcome to a new world where service heroes are empowered to provide empathy with their customers, build relationships and drive loyalty.
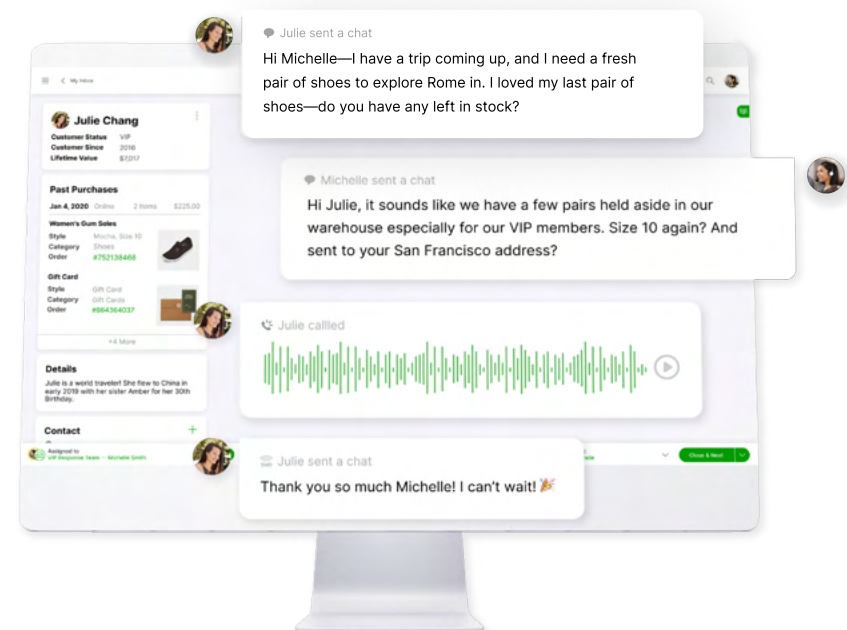
Moving all your channels to a single place

With Gladly, all channels are in the same system, and it's easy to send all customer requests, regardless of channel, to a single agent or hero.

Using Gladly means you don't have to sacrifice customer support principles on the altar of operational efficiency, instead you can have both. When your team can see the bigger picture of all the customers' interactions, customers are helped quicker and left happier.

Imagine having your heroes chat + text + email + phone calls + social messaging—not only with a full history across all of them, but consistent tools across the channels as well—finally!

As a platform that was designed to support many channels from the start, Gladly is built to support complex interactions, but in ways that are easy to understand and easy to use.

Gladly believes conversations should be driven by the customer, and not be frustrated because of the channel they choose. Your customers think all those contacts are connected so you need a tool that pulls contacts, channels and transactions together, to tell their complete story.

Creating seamless interactions across all your channels

Bringing all your channels together in one place may sound like too much load on your service heroes, but it makes things easier for them. By providing the full picture of a customer and all their conversations you allow them to seamlessly interact with customers across any channel.

Cross-channel communication is a vital step to gain efficiency and flexibility. It puts you back in charge of communications, rules, and processes that transform basic customer support into lifelong conversations and brand loyalty. When you must shift channels, or work across multiple systems, it slows meaningful progress and can even prevent your organization from making critical improvements.

For example, with Gladly you can:

- Pivot a conversation from SMS or messaging to a voice call-back to your service hero
- Automatically send CSAT links via text after a phone conversation
- Quickly send a summary of a request and resolution via chat or email

# Anchoring your service hero workflows around a customer inbox

Gladly was built around people, not tickets or cases, so workflows are anchored around an "inbox", something everyone is familiar with managing in their everyday lives.

Customers get better support by reaching the same people across any channel and heroes can pivot to a different channel to respond the best way—call-back, or email, or message—to use the best channel based on the customer's need.

In Gladly all the channels use consistent tools, heroes can swap seamlessly between channels (or pick up new channels as they are added).

- **Customer-centered**–all contacts with customer in one conversation
- **Reduce duplicated effort**–all contacts go to the same hero agent

- **Inbox instead of Queue**–as many inboxes as you need, use rules to route contacts to the right inbox
- Use multiple elements to drive People Match decisions, and to boost priorities for customers using your customer history

Sadie Hughes

Relationships +

Brian Michaels — Fiancé

Kara Miller — Personal Assistant
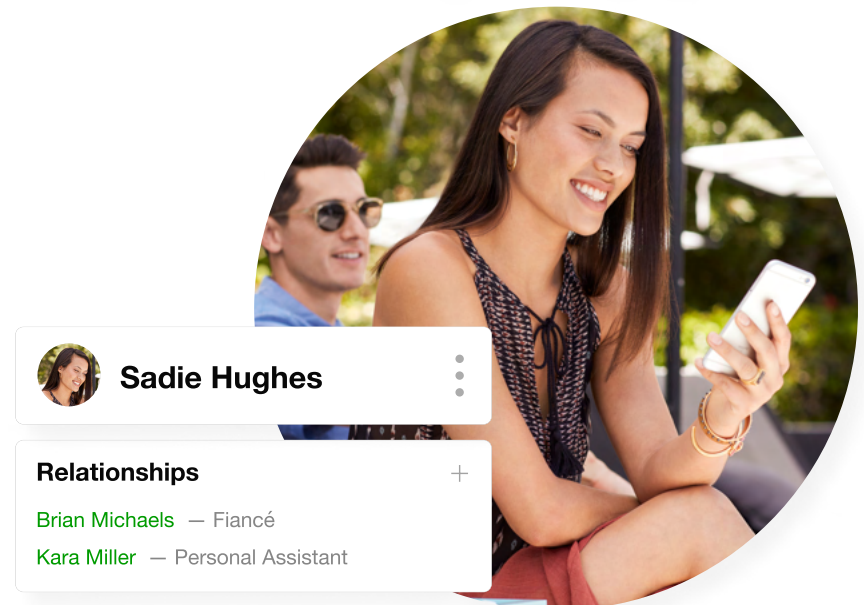
Flexibility for your unique challenges

Many Gladly customers are grouping customers with similar needs into inboxes as a transition tactic, sometimes with continued segregation of teams by channel. Even with a limited approach you get immediate improvements.

- Everyone sees the same consolidated conversation history

- Seamless switch from one channel to another

- Learn and use the same views, processes, and Answers to solve issues—making it simpler to shift team coverage at any time

You gain flexibility—even with all channels flowing to a single inbox, you can use rules to send text requests to specific agents, voice to others. You now have wider options to apply support heroes to meet your customer needs.

Getting pulse checks on your customer touch-points

Helping customers is not just about them explicitly reaching out with issues. Obviously, support heroes should give customers the right information, but support heroes are only one source.

Consider the various places you surface vital information about your brand:

- Online help center
- Website FAQs
- Chatbots
- Community forums
- Marketing
- Product manuals
- Sales collateral
- Legal contracts with fine print

Gladly can help simplify and integrate most of these locations. For example, content on your website and mobile app help centers, FAQs, and self-service can be authored by a single source. No longer do you have to create different content for different channels and update disparate systems.

With fewer tools to manage, you gain time to keep up with changes in other departments, and switch to proactive management of contact information.
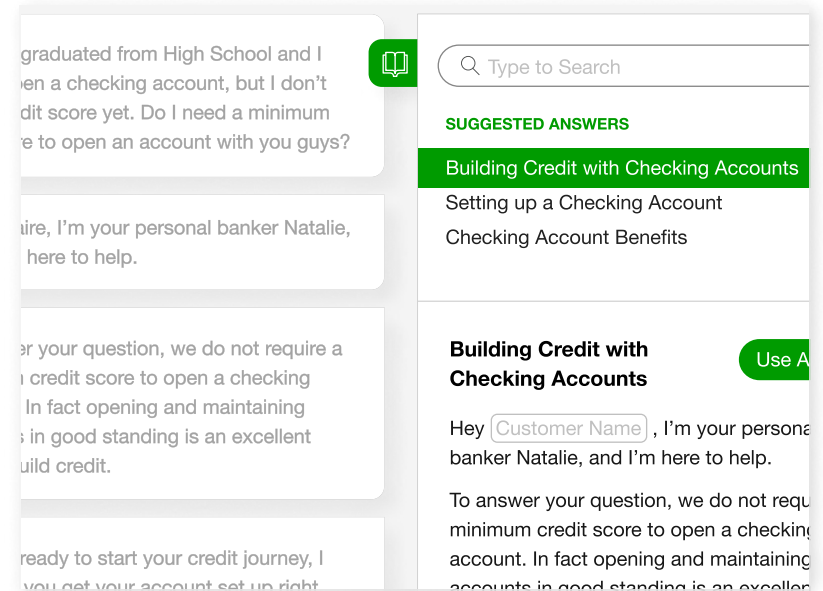
Authoring content once, publishing everywhere

You know how powerful a well-crafted script can be, and how important it can be to provide the same answers to customers. But when you have separate tools and individual databases for each channel, it can be a nightmare to update them all. Gladly can help you create better responses with a knowledge-base we call Answers. It's built to work natively with all of your channels in one place.

- Answers can be tagged for channel, language, and transaction context.

- Scripts and responses use the same tool and process across channels

- Answers can be re-used across channels for single-point updates

- Answers can be linked together to save time, you can also use linking as lightweight process tool

- Answers has a powerful segmenting layer, 'Audience' that can switch responses based on customer type, loyalty levels, business or consumer or vendor, or anything else you need

Gladly provides a simple-to-integrate help-center for your website that gives you single point control for customer FAQs, contact information, and other questions

Sidekick, the built-in Gladly web chat widget, can also use Answers content to drive messaging and self-service options

graduated from High School and I
pen a checking account, but I don't
dit score yet. Do I need a minimum
re to open an account with you guys?

aire, I'm your personal banker Natalie,
here to help.

er your question, we do not require a
credit score to open a checking
In fact opening and maintaining
s in good standing is an excellent
uild credit.

ready to start your credit journey, I
you get your account set up right

Type to Search

SUGGESTED ANSWERS

Building Credit with Checking Accounts

Setting up a Checking Account

Checking Account Benefits

Building Credit with Checking Accounts   Use A

Hey [Customer Name] , I'm your persona banker Natalie, and I'm here to help.

To answer your question, we do not requ minimum credit score to open a checking account. In fact opening and maintaining accounts in good standing is an excellen

A single-point tool for all your support and self-service messages is a big win.

With Answers you can update scripts and information wherever you need and be confident that your communications will align. Instead of multiple processes for multiple systems, you only need one tool to manage all your channels. And the best part is, customers will see consistent information, whether they are looking at your FAQ page or receiving a chat response from a service hero.

No customer has ever said, "please put me on hold again so I can explain this all over to a new person".

# Easily integrate with existing systems for stronger support

We know customers have complex problems, and the classic mistake is to escalate them through layers to get a resolution because tools are restricted or missing. What if you could rearrange teams so they can solve most issues in their main views? Would added systems be needed to support this change?

It can be a big list.

We know that every organization has unique systems and challenges, and those systems will change as you grow. So we designed Gladly to easily add out-of-the-box apps for common cases, with built-in tools for core information, and provide active developer support if you want to build something special on our platform APIs.

Gladly is built to play well with other systems, and designed to grow without disrupting previous integrations such as:

- Order or subscription systems

- Shipping information or escalation tools

- Financial system access for refunds or add-on sales

- PCI tools for secure online transactions

- Inventory and distribution process reporting

- Marketing or advertised promotion or discount information

- New product documentation and release scheduling

- Self-service tools for customers

- Legacy channel support solutions (import history data, plan for integrations)

- Legacy tools that are scheduled for replacement
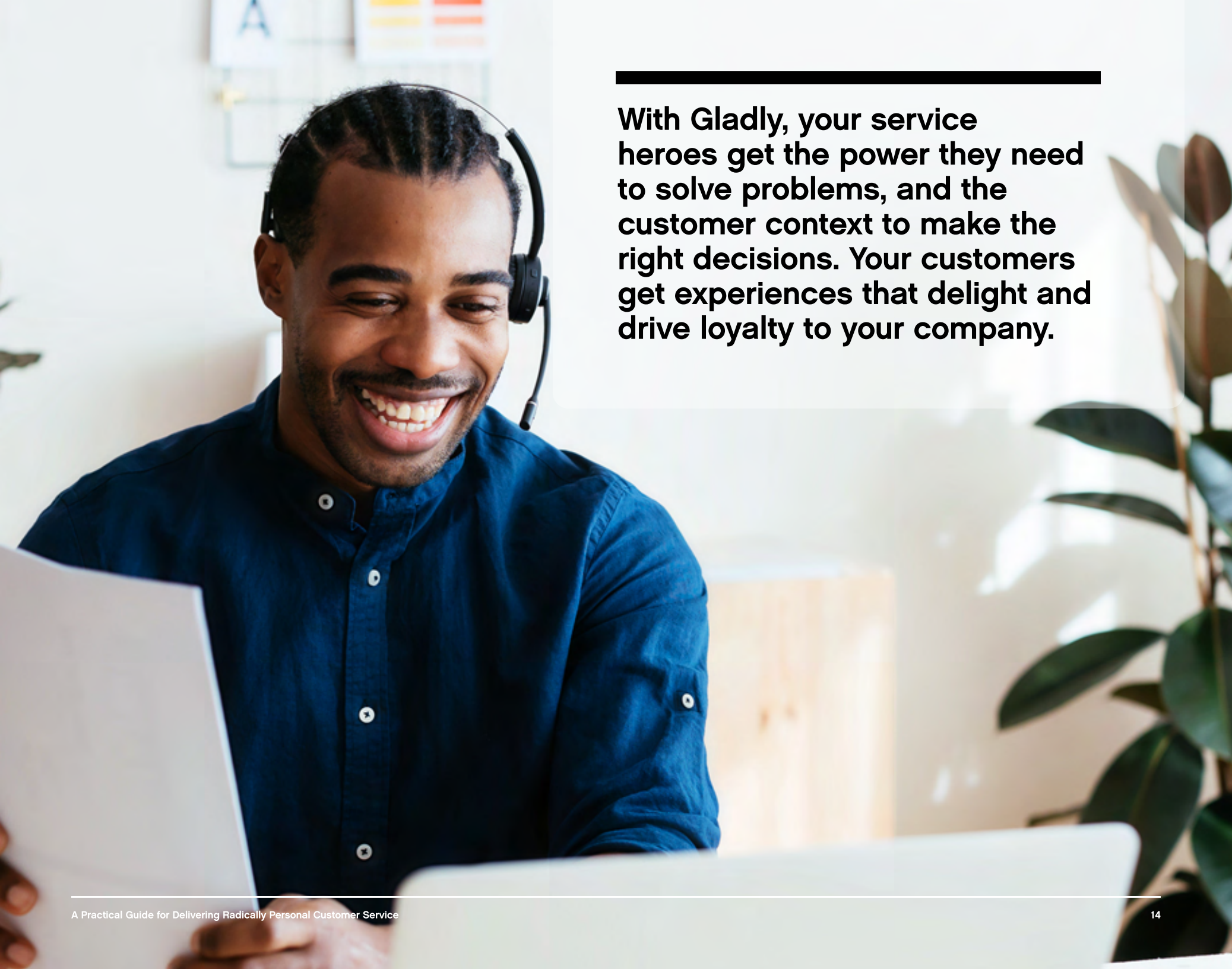
With Gladly, your service heroes get the power they need to solve problems, and the customer context to make the right decisions. Your customers get experiences that delight and drive loyalty to your company.

Reduce transfers with better automation and systems

Transfers are a primary cause of irritation for customers.

Giving more powers and tools to support agents means they can solve a range of issues on first contact, but can also be interpreted as risk in some organizations

No one wants to make errors or disappoint a customer. Very often errors are caused because people don't have the tools that are needed and they try to help from whatever they have. Not having access to tools, or even knowing they exist, causes more issues and more work to keep customers satisfied.

Integrations and automation for agents can also be applied to self-service - build automation to make heroes more effective, and then you can choose whether to add a customer self-service version later.

Automation for customer support rapidly became a tool for displacing or deflecting contacts, but that tactic only works when:

- Automation fulfills the customer need
- Self-service is what they want

Automation can be done well by taking a design approach with iteration, if you have tools that support self-service as part of a larger solution.

Gladly is built to connect to other data and other systems to provide exceptional ease of use and customer satisfaction. Gladly also gives you flexibility to consider where and how to deploy self-service options based on the same automation approaches.

Boost employee engagement by making it easy

Holding onto great people and great teams has become a problem everywhere—churn starts with bad conditions and bad tools.

Ease of use matters to your teams. Many conversations with customers start poorly and get worse, it can be stressful. The last thing anyone needs in the middle of a difficult conversation is a surprise from missing or hidden information. The need for ease of use is compounded in tools that you use for hours at a time. Great tools alone can't transform culture, but a terrible tool can grind down efficiency and morale and increase employee attrition.

Gladly empowers service heroes to feel smarter and more capable, and lets you hire people who are good at helping people instead of being forced to hire people who are good at technology.

It's really all about your teams. Happy employees really do make for happier customers and giving your agent heroes great tools that help them understand and solve problems is critical to success.

Good personal feedback is needed all along the way, particularly where you may be depending on remote teams. Your teams need to be able to see how they are doing, and how to plan their time effectively. Adding positive feedback and coaching reinforces key behaviors and growth.

Training and empowering your teams is a never-ending process. Tools that are predictable and easy to use are also easy to learn. Time saved with tools that are simpler and more powerful can be repurposed for all of the other things you need to teach people.

With Gladly, people are using the tools, the tools are not using them.

Gladly gets consistently higher ratings for ease of use from our customers (please check G2 for examples).

When you combine Gladly with good management you get employee engagement that matters.

Easiest To Use
WINTER 2022

But wait, what happens to my tickets?

At Gladly, we believe a ticket-based model distracts from helping people. But that doesn't mean we don't track issues. As an event-based cloud platform Gladly tracks everything, but we've designed our measurement tools with people at the center, not tickets.

Instead of separate tickets and searching to find related issues, we can collect all the events for a customer in one place

- Instead of measuring symptoms, we can now look at what drives satisfaction for analysis
- Customer-centered reporting helps you see behaviors and issues in complete context
- Focusing on the customer can unlock revenue opportunities and fundamentally change the relationship between support and the rest of your business

Gladly operates as a 'system of reference' to tie together all of the external systems you use to help customers—it maps the customer journey and holds relationships to all the transactions in those systems giving you new perspectives on customer behaviors

Of course, you can also run reports based on transactions and other events too!

We understand that tickets are a proven way to track and measure issues.

Ticket data drives many contact center decisions and even compensation. Still, tickets can be abused or 'gamed' by people, and when that happens the customer ends up as the loser.

Traditional customer service systems had limits and measured things that were easy to measure. But with cloud resources you can measure and track specific issues, and also tie them to the customer and all their other interactions.

Inquiries no longer have to be stitched together; you get an easy to understand full picture.

Self-evaluation Checklists Contact channels and coordination points

Checklists are a useful tool to analyze and summarize the uniqueness of your company. They can help you unearth hidden opportunities for simplification and for internal collaboration with other departments and systems.

Contact methods or channels

How do your customers engage with you?

- [ ] Website chat
- [ ] Website request forms
- [ ] Social messaging (which platforms?)
- [ ] Mobile chat
- [ ] Email
- [ ] IVR
- [ ] Voice
- [ ] Voicemail
- [ ] Customer forums
- [ ] In-person service (brick and mortar)
- [ ] Other?

Support information or link points

Where do customers find links and published contacts? Customers can get frustrated and build resentment when they find inconsistent or broken access points.

- [ ] Website footer
- [ ] Website contact page
- [ ] Website Help center
- [ ] Email reply-to
- [ ] Email signatures
- [ ] Product packaging
- [ ] Advertisements
- [ ] Press Releases
- [ ] Customer forums
- [ ] Review sites
- [ ] Other?

Self-service

- [ ] Chatbots for information (web or mobile)
- [ ] Chatbots for actions
- [ ] 2-factor authentication or other ID security
- [ ] Web request forms
- [ ] Social messaging (pivot to private modes)
- [ ] IVR with info + actions
- [ ] Web feedback monitoring
- [ ] Mobile app with custom actions
- [ ] Kiosks or remote automation locations
- [ ] Appointments or call-backs for service (including field operations)
- [ ] Other?

Self-evaluation Checklists
Key systems for support resolutions and self-service

Key systems

What do you need to resolve issues?

How many different systems does it take to solve your common use cases today?

☐ Customer Relationship Manager (CRM)

☐ Customer Data Platform (CDP)

☐ Loyalty systems

☐ Order systems

☐ Finance or payment systems

☐ Shipping and returns

☐ Appointments and reservations

☐ Distributor systems

☐ Brick and mortar site communications

☐ Mobile apps with custom tools

☐ Help center

☐ Feedback systems

☐ Duplication of systems (regional or global)

☐ Other (custom or legacy tools?)

Tracking tickets or people data

How do you track activity today?

It's common to have multiple "systems of record" for different tasks and channels.

☐ All activity tracked in Customer Relationship Manager (CRM)

☐ Tracked in multiple support systems

☐ Tracked in unified support system

☐ Updates in multiple systems

☐ Mixture of local tools and web apps

☐ Custom tracking database

☐ Business Intelligence (BI tools) data lake

☐ Spreadsheets or web forms

☐ Other?

Self-evaluation Checklists
Team organization and engagement

Team organization today

How do you allocate contacts to your teams?

- ☐ Teams and queues use multiple channels
- ☐ Teams organized by individual channels
- ☐ Teams separated by text channels v. voice
- ☐ Separate teams by language
- ☐ Some channels supported by other departments (example: social channels in marketing)
- ☐ Internal support duties
- ☐ Mixed segments to support
- ☐ Multiple brands or affiliations

- ☐ Multiple product or service lines
- ☐ Segment by intent (action needed)
- ☐ Loyalty tiers
- ☐ End customers plus distribution or franchise customers
- ☐ Tiered levels of technical support
- ☐ Business hours with off-hours self-service
- ☐ 24/7/365 support needs
- ☐ Follow-the-sun global support sites with handoffs
- ☐ Other?

Radically Personal team organization

What would be a better way to group your teams with a more flexible system?

- ☐ Customer-centered - every channel connected to the same agent hero
- ☐ Segment teams by customer populations (by purchases, loyalty, relationship, activity, more)

- ☐ Teams organized by text or voice skills needed
- ☐ Teams segmented by customer type (end customers v. distributor, or vacation renter v. rental unit owner)

Self-evaluation Checklists
Key benefits

Ease of use

Features that increase efficiency and reduce training time

- ☐ Conversation history shows full customer journey
- ☐ Consistent tools and process across all channels
- ☐ Single point knowledge-base to manage answers for all channels, self-service and web help center in one tool
- ☐ All customer activity routed to same agent hero
- ☐ Flexibility in assignments and rules

- ☐ Transparent status and dashboards
- ☐ Unified inbox for agent communications, quality reports, assigned activities
- ☐ Uses 'modern' web app tools and workflows for easy recognition
- ☐ Self-service admin tools to manage people, rules, routing, workflows within teams

Hidden efficiencies

Soft costs and added complexity add up to savings

- ☐ Faster recognition of customer issues
- ☐ Inline chronological customer journey with links to specific events - no searching in multiple places for activity
- ☐ Quick learning curve - consistent tools across all channels
- ☐ Flexibility to adjust duties without re-training
- ☐ Real-time activity tracking instead of after-call work

- ☐ No more duplication of effort from requests that come in on multiple channels by the same customer
- ☐ Extendable tools to add functionality to agent views for orders, changes
- ☐ APIs and developer support to build custom solutions

Self-evaluation Checklists
Key benefits (continued)

Revenue from support

Great customer experiences can also generate revenue and change CX perception in your company

- ☐ Return and order exchange cross-sell or up-sell
- ☐ Service appointment prioritization with loyalty programs
- ☐ Tiered services up-sell
- ☐ Proactive follow-up on orders for additional sales

- ☐ Pattern recognition to convert repeated purchases into subscriptions
- ☐ Opportunities to connect customers to boutique services such as personal shoppers

Where to go from here?

This may be a new way of thinking, and the challenge is exacerbated because many buyers have never been through this experience before. Sometimes feature comparisons can be a distraction from the real problems you face.

You want to make the right decisions, because it will affect your customers, your teams, and you—for a couple of years at the minimum.
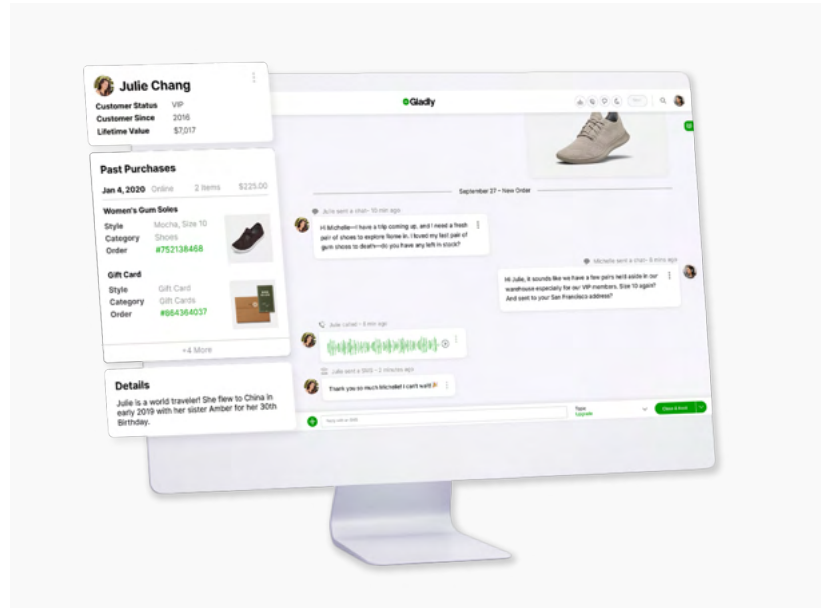
With many options in the market, it's critical to understand the differences between platforms.

Changing important systems is disruptive, and you need to get the maximum boost for your time and effort. At Gladly we believe you need effective information to build a framework for the changes you need to power great customer experiences.

Gladly works with amazing brands and we continue to grow because we love our customers, just as you love your customers.

When you're ready to talk, we're here to help.

Gladly

After switching to Gladly, companies see up to

20%
increase in agent productivity

20%
increase in operational efficiency

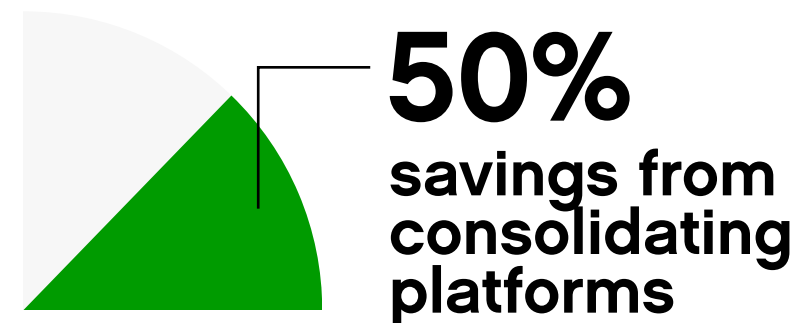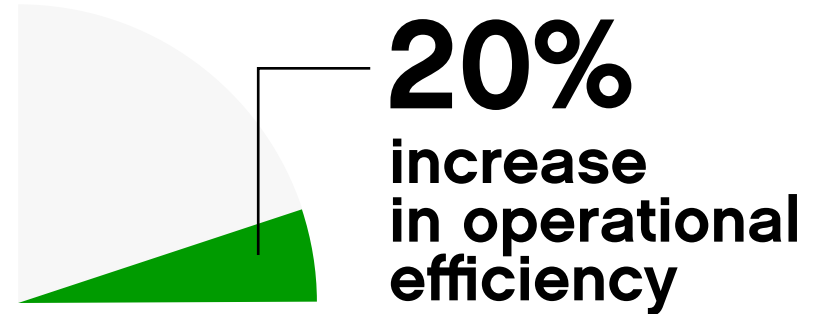
50%
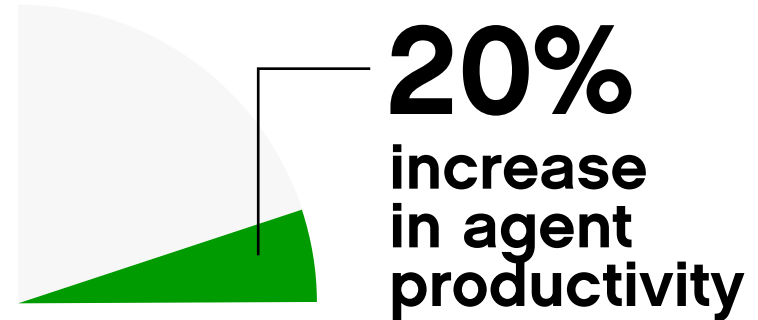savings from consolidating platforms

About Gladly

Gladly is the customer service platform that makes customer support a competitive advantage. Unlike legacy service platforms that treat customers like tickets, only Gladly treats customers like people.

Every communication is part of a single, lifelong conversation that spans all channels including voice, messaging, and self-service. Gladly uses full customer context to match customers with the answer they need or the agent best equipped to help. Gladly makes service teams wildly efficient, transforms contact centers into revenue drivers, and turns customers into die hard fans.

REQUEST A DEMO

Gladly