**2020 CHECKLIST**

# The 12 Requirements For Radically Personal Service

# Foreword

Rewind about 30 years and the formula to customer acquisition was pretty simple: charge less than your competitors, get all the customers.

But today, price has become less of a decisive factor when it comes to purchase decisions. Now, customers will pay a hefty premium for makeup lines advertised by their favorite influencer, or boycott a brand that doesn't maintain a sustainable supply chain, however inexpensive.

**Customer priorities have shifted.**

Today, customers are looking for brands that they can connect to—that feels personal to them.

In the past three years that we've released our Customer Expectations Report (our annual report of everyday consumers on what consumers want and expect when it comes to customer service), we've found two factors to be overwhelmingly important when it comes to service:

## The experience feel personalized to who they are as individuals, and that the service be delivered fast.

For companies like yourselves—the ones that are truly focused on ensuring the best possible experience for your customers—that means being able to deliver an experience that caters to the unique character and personality of your customers.

And while it might seem impossible to deliver on one without sacrificing the other—especially with the added barrier of having to have these conversations virtually or over the phone and not in person—the answer to giving your customers their cake and letting them eat it too (because why shouldn't they?) lies in technology.

In this book, we dive into the nitty gritty:

# What are the technical capabilities your customer service platform should have so you can deliver on these twin objectives? And to do it at scale no less?

Ready to get radically personal? Let's get right to it then.

Be Channel Agnostic →

Be Customer-Centric →

Drive Speed and Efficiency →

Optimize for Costs →

Provide Actionable Insights →

# Be Channel Agnostic

To egregiously misquote Madonna, we're living in an omnichannel world.

A customer might start a chat on their mobile app while in line for groceries. Follow up over the phone on the way home. Then send an email a week later to check in.

That's why it's important that your customer service platform be able to handle all those multi-channel interactions in a fluid, seamless manner—as if the channel itself doesn't matter at all.



**1**

## One platform for all channels

When putting together your omnichannel strategy, it's tempting to mix-and-match different platforms for every channel to suit your company's specific needs. Because logically, that means you'll be able to provide the best experience for your customers on every channel.

But in reality...not so much.

That's because having separate platforms for each channel results in data siloes, which means your agents don't have visibility into what a customer said in a previous interaction, on a different channel.

This not only leads to the not-so-fun 'repeat and recap' game—where your customers have to rehash the entire history of what happened in their past interactions—but to other wasteful inefficiencies like agent collision or effort duplication (when multiple agents respond to the same customer on the same question because a customer reached out on different channels).

## 2

## Keep all conversations in a single thread (regardless of channel)

Needless to say, channels don't really matter to your customers—they're just going to use the channel that's most convenient to their mood or situation at the time.

Likewise, the channel your customers reach out on shouldn't matter to your customer service platform either.

Regardless of whether your customer switches between two channels or 20, your platform should be able to gather all those interactions onto a single screen, and into a single thread.

That way, your agents don't have to waste time toggling between different platforms, tabs, windows, and tickets to get a full understanding of your customers' history; and your customers don't have to repeat and recap their history each time they reach out.

And it also helps prevent agent collision and unnecessary duplication of work since an agent can see the full history of a customer's questions (regardless of the channel) and answer them in one go.



## 3

## Have the flexibility to add new channels on the fly

And because what you may need now may be different from what you need later, be sure that your platform is flexible enough that you can add new channels as and when you need.

A flexible platform prevents the situation of having to add a new layer to your tech stack when it comes time to add new channels. This helps prevent data siloes, and in turn, the repeat, recap, and unnecessary inefficiencies we've outlined above.

# Be Customer-Centric

For over 20 years, customer service platforms have been based around the ticket. Every time a customer reaches out with a question or issue, a new ticket is created and routed to an agent to work on.

And it's understandable why. Companies needed to be a way to manage, track, and collaborate on work. But just as the Flock of Seagulls' hairdo has seen its day, so too has the ticket.

Now that it's more important than ever to understand and cater to the customer, it's really the customer that should be the central point of every interaction—not a ticket.

**4**

## Route customers, not tickets

As we've mentioned earlier in this book, the way customers communicate today has changed. Customers are no longer restrained to using a single channel, but flow freely back and forth between multiple.

So when platforms separate these interlinked communications into tickets, customer service agents get an incomplete understanding of what the customer needs, and have to then waste precious time investigating for themselves, or rely on the customer to rehash their history for them.

What we mean when we say route your customer, is that you route not just their current interaction, but all the previous interactions they've had with your company, regardless of channel, along with key details about them that agents can use to personalize a conversation (more on this below, under Provide a full picture of your customers).

**5**

## Consider your customers' unique needs and situation

Being customer-centric is all about being obsessed with your customers' needs and expectations. Look for a platform that can take those needs into consideration, for example, routing a customer based on how close they are to hitting their Service Level Agreements (SLAs).

Or perhaps even taking into account their unique situation; a customer booked on a flight that's taking off soon should probably be routed ahead of a customer whose flight is two weeks away.

That way, you're able to put your customers' needs first and foremost.

**6**

## Provide a full picture of your customers

Your customers share a lot of information about themselves with you. From their birthdays (as part of your loyalty program), to their past transactions (in your order management systems), to their wedding anniversaries (in conversation with your agents), and more.

But having all that information spread out across different places and systems makes it hard for agents to leverage when helping your customers.

Your customer service platform should be able to bridge the gap between your disparate systems and platform, pulling key customer details from multiple sources, and presenting your agents with a curated view of your customer they can use to make your customer experiences feel radically personal.

By not hiding these details across systems or tabs, you make it easy for your agents to go the extra mile to connect with your customers. Plus having them readily available is a visible reminder each time to your agents to do so.

# Drive Speed and Efficiency

Customers want service that feels personal, and that's customized to their needs. But at the same time, they want that service delivered fast.

That means companies need to be able to find efficiencies in other parts of the process, and the easiest path to doing that is by empowering agents to work smarter and more efficiently.

**7**

## A built-in, searchable knowledge base

Having a robust knowledge base is a great resource for agents, but when it's housed in a separate platform, or requires an agent to navigate to a separate tab or window, it can take unnecessary time out of your agents' day.

Your customer service platform should have a built-in knowledge base, which means agents don't have to leave the screen they're talking to a customer from, to get the answers they need.

**8**

## Time-saving automation and AI

Let the robots do the rote, time-consuming tasks your agents have to do.

For example, an AI-powered knowledge base can suggest the best knowledge base answer that an agent should use to respond to a customer, rather than having to manually search for it themselves. Or recommend how a conversation should be dispositioned.

That way, agents can get to helping your customers faster, which means they have the time to inject some personal(ity) to the interaction.



Agents who use Gladly's time-saving automation features have seen an average **increase of 20% in productivity**.

# Optimize for Costs

Contact centers are expected to deliver a lot with limited resources. Your support platform should help you stretch the resources you already have, while empowering your team to expand and add to it.
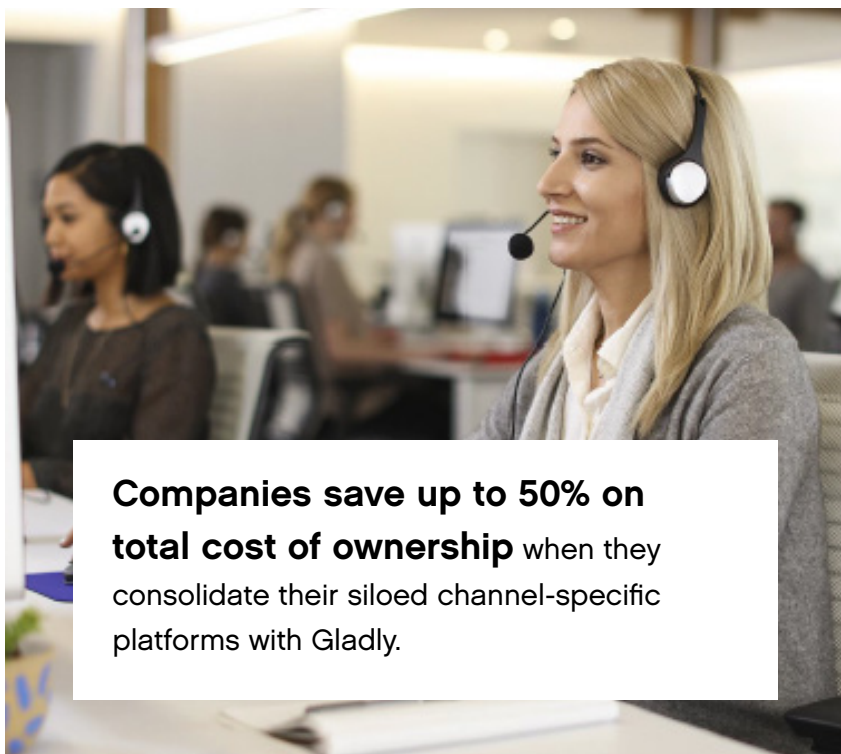
**Companies save up to 50% on total cost of ownership** when they consolidate their siloed channel-specific platforms with Gladly.

## 9
### One flat fee for all you need

Having separate platforms for your different channels doesn't just affect your customer's experience, it also tacks on extra costs in terms of separate license and maintenance fees—all of which add up to a pretty penny.

Companies that have replaced their siloed platforms with Gladly have reaped up to 50% in cost savings on their total cost of ownership, compared to what they paid for their separate channel solutions.

## 10
### Empower agents to make the sale

Besides maximizing your current resources, having a platform that empowers your agents with key insights about your customers—like what they've bought in the past, or if they prefer flats to heels—helps them understand your customer's unique tastes and needs better. With that insight, they can make far more relevant, targeted recommendations that are far more likely to convert, bringing in valuable revenue to your contact center.

Agents should also be able to accept payments from customers from any channel, whether it's messaging or the phone—that way they don't have to leave a sale to chance, and can get direct attribution for their efforts.

# Provide Actionable Insights

It's hard to run a contact center that you can't measure. To ensure that you're on top of your SLAs, handle times, and trending topics, your customer service platform should be able to provide a real-time, reliable view of your contact center.



## 11 Real-time reporting

Customer service happens in real time—which means you should be able to measure your contact center in real time too.

Your customer service platform should be able to give you an instant view of how your contact center is performing against your SLAs, and include important metrics like the volume of incoming customers, and average wait time.

## 12 Reporting across all channels

And because your contact center operates across a gamut of channels, your reporting (both historical and real time) should give you a view of how you're performing across all those channels too—without the need to toggle between multiple tabs, windows, or platforms.

That way you have a comprehensive bird's eye view of where you're achieving your goals (and where you might not be), and can make the changes you need faster and more efficiently.

# 2020 Checklist:
## Does Your Customer Service Platform Stack Up?

Take the test and see if your customer service platform is ready to deliver radically personal service.

Check the box if your customer service platform lets you do the corresponding action.

### What Do Your Results Mean?

Tally up your check marks and see what your score means! (1 checkmark = 1 point).

**0 - 5 points:** New year, new you. It might be time to think about an upgrade.

**6 - 11 points:** You're on the right track, but there's still more you can take advantage of.

**12 points:** Nice! You're a master of radically personal.

### Be Channel Agnostic

☐ One platform for all channels

☐ Keep all conversations (regardless of channel) in a single thread

☐ Have the flexibility to add new channels on the fly

### Be Customer-Centric

☐ Route customers, not tickets

☐ Consider your customers' unique needs and situation

☐ Provide a full picture of your customers

### Drive Speed and Efficiency

☐ A built-in, searchable knowledge base

☐ Time-saving automation and AI

### Optimize for Costs

☐ One flat fee for all you need

☐ Empower agents to make the sale

### Provide Actionable Insights

☐ Real-time reporting

☐ Reporting across all channels

# Conclusion

With the market as competitive as it is today, companies cannot afford to put customer service on the back burner. In fact, it's safe to say that every company needs to treat each interaction they have with a customer as an opportunity to continually reengage with customers, and re-earn their loyalty each and every time.

And that is something that cannot be done without the right processes in place—one that puts the customer at the center of every decision—and certainly not without the right technologies to back that strategy up.

As we enter a brand new decade, it's time for radical measures that can help transform how you connect with you customers—and it starts with a radically personal approach that builds meaningful relationships, puts customers first, and drives revenue.
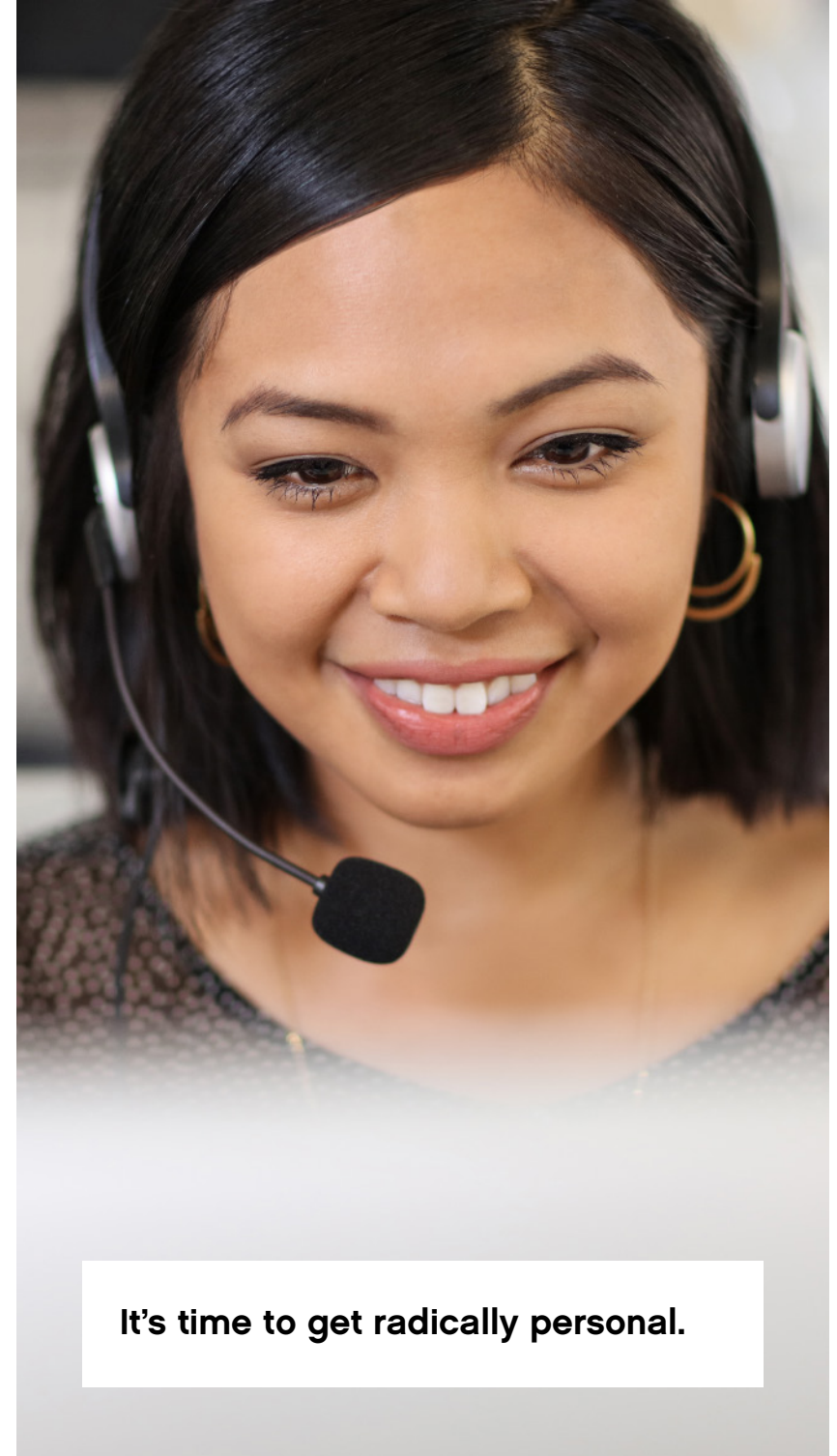
**It's time to get radically personal.**

# Delivering Exceptional Experiences

Gladly makes delivering radically personal customer service possible for everyone.

## Center service on people to drive revenue

Gladly empowers teams to build relationships that drive revenue by putting all the context of the customer right at an agent's fingertips.

## Meet your customers where they are

Gladly enables agents and customers to move seamlessly between channels, with voice, email, text, chat, and messaging, all natively built into a single platform.

## Drive effortless efficiency to cut costs

Eliminate duplicate and merging tickets. Superpower your agents to help customers faster with AI solutions built right in.

## Trusted by customer experience leaders like

jetBlue        TUMI        Andie

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**See Gladly in action.**



Seeing is believing—See what Gladly can do in an interactive hands-on demo.

SIGN UP FOR A DEMO →