Making Service Your Business
A CX Leader’s Guide
Managing a customer support team is no small task

On one hand, you have to think about the brand. How is my support center running effectively? How am I doing everything I can to get customers the information they need, when they need it? Is our customer service reflecting positively on the overall brand?

Here, it’s paramount to think about your staff’s health and wellness. If the agents you oversee are overworked, underequipped, and overall unsatisfied within their role, you won’t have a shot at trying to solve any of the brand-related concerns above. When a support team underperforms because of those factors, the ripple effects can be substantial. According to our Customer Expectations Report (CER), businesses are losing $75 billion a year in revenue due to inadequate customer service alone.

Source

Businesses are losing $75 billion a year in revenue due to inadequate customer service alone.
Customer service is an emotionally taxing field, made up of humans supporting other humans. The CX leader’s job is to develop, unite, and inspire staff to create an uplifting work environment for their team that spills over into a successful service-driven support center for customers — all while delivering on their own responsibilities too.

The CX leader’s job is to develop, unite, and inspire staff to create an uplifting work environment for their team that spills over into a successful service-driven support center for customers.

While CX leaders have their work cut out for them, some tangible steps and applicable tools can give you and your team an advantage right away. As we go through this guide, we’ll show you how you can start:

1. Identifying and eliminating the barriers to professional satisfaction in your staff
2. Measuring and boosting metrics of success within your organization
3. Developing your staff to be more proactive and customer-centric
4. Breaking down your support technology stack to see where you can add more capabilities
5. Creating an environment of transparency that starts from the top down

This is how you succeed in ecommerce today. Any brand can make more, better, faster, stronger products, but these companies will only be competing with one another for immediate sales. Building a sustainable brand starts with creating an unparalleled customer experience, something modern customers value more than anything, and doing so requires the skills and acumen of your support team.
Clearing a Pathway to Professional Satisfaction

Your customer service agents are the face of your company, standing on the frontlines of your brand. They should feel pride in that kind of representation, but the stress and thankless nature of the agent role can reduce them to feeling like question-and-answer machines if you aren’t careful. Inversely, a Gallup poll found that highly engaged workplaces are 14% more productive overall than their less supported counterparts.

That’s why delivering quality, revenue-generating service starts with a staff that feels fulfilled in their day-to-day work and proud of the brand they work for. You have the responsibility and the capability to inspire that level of fulfillment, as long as you make an effort to understand the daily highs and lows of working in a service-driven support center.

A Gallup poll found that highly engaged workplaces are 14% more productive overall than their less supported counterparts.

Source
What Motivates a Support Agent

Think about those basic wants that a support agent hopes for in their workplace, and how your position gives you the power to unlock these aspects of their job:

**Autonomy**

No one likes to be micromanaged, so give them the tools to succeed and then get out of the way. Ensure that each employee has the ability to control their work and solve customer issues without having to bring in colleagues to help.

- The capabilities of your support platform are paramount to making your agents feel more in control. Gladly combines accessibility, automation, and a centralized interface to put power in the hands of agents, elevating them from everyday agents to Support Heroes. Check out all the ways we can help Heroes be more autonomous and efficient.

**Appreciation**

If you’re not careful, your support center will start to feel like the rest of them — a notoriously burnout-heavy work environment. As a leader, you can do a lot just through acts of appreciation, reminding your team that the work they do is important and recognized.

- Customer appreciation ideas can range from small gestures to bigger acts of recognition, such as:
  - Writing personalized thank you notes to agents for a job well done.
  - Rewarding them with prizes or financial incentives for impressive work or longevity within the company.
  - Take a look at these other customer service appreciation ideas and try incorporating a few into your own workspace.

**Growth opportunities**

If you hire well, your agents will not only be effective and emotionally intelligent but also ambitious. These employees want the opportunity to prove themselves and do more for your brand, so don’t impede on their potential. Growing in a company is a major motivating factor that helps agents decide whether they want to stay with a company for the long term.

- Start small, but think big. Gladly empowers agents to do more than just answer questions, and even allows them to start selling to customers on their own. You can motivate them on this path to growth by:
  - Encouraging agents to proactively reach out to customers to push for or complete potential sales.
  - Routing your historically high-spending customers to agents who are actively growing and developing their sales skills.
  - For motivated agents, you can incentivize growth opportunities through sales.

Making Service Your Business A CX Leader’s Guide 5
The CX leader is a bulldozer. Your employees constantly run into walls that prevent them from doing their jobs, and it’s on you to knock them down. Here’s what you can do.

**Overwhelming volume**

There are always more customers who need assistance as long as a brand keeps selling products or services. Oftentimes, high volume is the main stressor that leads to burnout and employee attrition.

**What do agents need?**

When the support team is overworked, leaders need to hire enough staff to handle new levels of volume. But hiring just for the sake of it does not make for a sustainable workplace. Think about your brand, what qualities you feel best reflect your goals, and how you want your staff to work toward those goals in the workplace. Not only will you hire better, but you’ll show your existing employees that you’re actively working to make the team stronger and more supportive to one another.

**Helpful resource**

Having a list of potential hiring questions for remote agents is a great place to start. Sift through and take some ideas for how you can build your own customer service hiring checklist.
Lack of resources

Even an appropriate number of agents might not cut it if the
team doesn't have access to the right resources for solving
pressing customer issues.

What do agents need?

Your support platform needs to have the tools built in to give
your agents a leg up, rather than force them to work even
harder than they already are. With a platform like Gladly,
you get out-of-the-box omnichannel control of customer
information and long-form conversations, which truly makes
agents feel like they’re in the driver’s seat.

Helpful resource

Not sure how your existing platform stacks up? Use this
CX self-assessment checklist to uncover the gaps that are
blocking your agents from being successful.

Poor organization

If you don't organize your team properly, you run the risk of failing your
entire support center and business as a whole. Poor organization leads to
miscommunication, low productivity, and ultimately more frustrated customers.

As teams go remote, this managerial task becomes more
challenging, but also more pressing than ever, as team leaders
need to make sure they’re properly tracking and motivating their
employees, regardless of where they are.

What do agents need?

You need to implement a clear line of communication with your team members to show
your commitment to transparency and accountability for all parties, top to bottom.

Helpful resource

Take a look at this handy guide to managing remote customer service teams,
filled with insights that often overlap with in-person management as well.
Accurately Measuring Your Service-Driven Support Center

Though every support center measures success differently, most managers know the common metrics and how they are reflected in a well-functioning workplace. But today, quality customer service is measured a bit differently than in prior generations of retail, so you need to make sure you’re paying attention to the right numbers.

Looking at the True Meaning of Support Center Success

Think of your support center as service-driven rather than action-oriented. In other words, your aim should be to develop lasting, valuable relationships with customers, rather than simply pushing them along the service funnel to get them out the door and off your agents’ plates.

With that in mind, you’ll realize that on top of tackling more customer requests to lower stats like average wait time (AWT) and average handle time (AHT), you should really be measuring the value your team is providing by using these customer service metrics instead.
**Customer satisfaction score (CSAT)**

This metric is measured through customer surveys, where shoppers rate their experience on a scale of, say, one (very unsatisfied) to 10 (very satisfied). This helps gain insight into shopper happiness while pinpointing when and where certain channels, topics, or even agents are not providing the optimal experience.

**How can I help my agents boost CSAT?**

Deeper personalization is the root cause of higher CSAT. Creating more personalized experiences is the fastest route to high CSAT scores, whether it's accomplished through our powerful tools that can better track and share **consumer information**, or through encouraging employees to proactively incorporate these details into their regular interactions.

_Tory Burch_ had a massive support division before they switched to Gladly, but it wasn't until they started using our conversation-driven approach that they were really able to see consistent success with their customer interactions. By expanding their agents' channel capabilities and allowing for a greater rate of concurrency (i.e. enabling agents to adequately handle more tasks at once without overwhelming them), they increased their average CSAT score to the high 80s.

**Customer effort score (CES)**

Similar to CSAT, you can measure CES using customer survey responses, typically asking customers a question like, ‘On a scale of ‘very easy’ (five) to ‘very difficult’ (one), how would you rate the ease of resolving your issue?’ A higher score indicates a happier customer, one who's more likely to come back again. But if a customer has to bounce around to multiple agents or wait a long time to get a simple answer, your CES will plummet.

**How can I help my agents boost CES?**

Improving CES starts with streamlining processes. That’s why Gladly tools like **People Match** pairs your support team with the tasks they’re best at handling. This technology automatically drives customers to the most capable agent for their unique situation, reducing the amount of effort customers have to exert to resolve their issue. At the same time, those agents will feel empowered to flex their expertise muscle, successfully leveraging their ability to tackle the issues they know how to handle best.
First contact resolution (FCR)

FCR measures how often a support center solves service issues upon first contact with the customer. The higher this rating is, the more successful your team was at providing clear solutions to questions and complaints, thereby leaving more customers feeling confident in the expertise of your service-driven support center and overall brand.

How can I help my agents boost FCR?

The more you can enhance your self-service, the better your FCR numbers will be. Start by taking unnecessary work off your agents’ plates, and consider them the second line of defense, rather than the immediate first choice. Customers want to solve most of their issues on their own, but not lose the ability to connect to a live agent. Our Customer Expectations Report found that 57% of consumers want an easy transition from a chatbot to a live agent, should it be necessary.

Therefore, putting more self-service options in place will give your support center a better chance at resolving issues on first contact while maintaining a personalized touch no matter what.

Internal quality score (IQS)

IQS is similar to CSAT but for internal use. Your brand creates an IQS standard to gauge performance using surveys to identify quality of work and how much support agents need from managers.

How can I help my agents boost IQS?

A key piece of the Gladly toolbelt is insights that provide detailed performance measurements of service quality based on channel and agent. While not a direct replacement for IQS, this dashboard can be a jumping off point to create your own performance rubric.

Net promoter score (NPS)

A measurement of your shoppers’ loyalty, NPS identifies how likely your customers are to promote your brand to others using a 1-10 scale, with 10 being the most positive promoter. To calculate the final score, you subtract the percentage of detractors from the sum of promoters and passives.

How can I help my agents boost NPS?

As a direct indication of loyalty, NPS can be increased through improved customer service that creates more personalized experiences. Try empowering agents to upsell and cross-sell products to interested shoppers, which will have the combined effect of producing new revenue while demonstrating the kind of personal interest that shows shoppers their loyalty is worth it.
Giving Agents the Power to Move On Up

As a CX leader, you should be attentive to the long-term needs and potential of your agents. Not only can you clear pathways for them to excel in their daily jobs, but you can even train employees to take on bigger and more complex assignments. The more opportunity they see in their future with the company, the more empowered they’ll feel to deliver unparalleled service.

Turning Agents Into Product Experts

Having agents who can speak to your products and services isn’t just an added bonus, it’s a fundamental reason why customers stick with certain brands or buy even more from them. According to our Customer Expectations Report, 68% of consumers like when customer service agents are “knowledgeable experts on the brand and product.”

Achieving product expertise at an agent level takes a combination of intensive training and access to support technology. When implemented correctly, you’ll see the benefits and start to flesh out the service-driven support that any leader would take pride in.

According to our Customer Expectations Report, 68% of consumers like when customer service agents are “knowledgeable experts on the brand and product.”
Training

Your agents want to feel like experts as much as you want them to be, so give them the insight they need to respond to product questions without hesitation. Start with giving them access to and testing them on essential information about your catalog. You can then go even further to ensure your staff understands how different products complement each other to potentially upsell customers, creating new revenue streams as a result.

Helpful resource

For a deeper dive into expertise training, check out these three handy tips you can implement right away.

Technology

Your support technology should make product information far more accessible. If agents can reference your vast catalog data on the fly, they’ll feel way more confident when facing customers and answering their tough questions.

Helpful resource

Our Knowledge Base allows agents to reference a single, scalable resource that not only consolidates all the necessary information into one place but also ensures that the language used by agents is consistent across conversations with customers.
Providing Agents With Skills to Succeed

Training your team doesn’t end with onboarding. Never stop thinking of ways to develop agent skills further to help them grow into more confident and effective employees.

Soft Skills

Consider these principles of emotional intelligence as foundational to truly impactful service. Here’s what you should work to develop in each of your employees.

Active listening

Rather than listening for the purposes of taking notes and responding to the customer’s basic needs, practice **active listening** that encourages asking deeper questions surrounding each issue. Doing so will tell shoppers you are interested in them and encourage them to shop with you above other competitors.

Empathy

The more your agents understand how customers think and shop, the easier it is for them to **put themselves in their shoes**. That starts with building customer profiles to paint a clearer picture of how each shopper feels during their journey to a purchase.
Patience

Some service situations are deeply frustrating for both customers and eventually agents. By giving your team the tools to lean on one another for help, they’ll have much more breathing room to meet shoppers with patience. Try our task management software, which helps share the workload for agents to maintain calm no matter the situation.

Helpful resource

Take a page out of Andie Swimwear’s book and develop service guidelines to help your agents get a clear vision of the soft skills you expect from them. Andie re-established their service team by removing ticketing altogether in favor of a conversation-driven approach, forming the basis of their new “concierge” service.

Under this new umbrella, they devised clear best practices for incorporating personal touches and using historical conversations to inform reps, so customers didn’t have to repeat themselves. Shoppers were happy, and agents were far more confident in their work, knowing they had a clear reference point for properly upholding their brand’s standards.

Listen to the Andie episode of our Radically Personal podcast to learn more.
Hard Skills

On top of strong emotional intelligence, you as a leader have the power to imbue your staff with stronger hard skills they can apply in their work right away.

Upselling and cross-selling

As mentioned, empowering agents to sell on their own is a great revenue stream as much as it is a great way to promote loyalty. Understanding customer preferences is a great start. Incorporating purchasing into communication channels reduces upselling and cross-selling friction even more. Our Payments tool helps agents close sales right in chat, SMS, and other channels.

Employing scripts

Script training in customer service is a common tactic, and for good reason. Like establishing best practices, scripts help develop consistency of language across agents while also giving them an easy way to feel comfortable communicating on different support channels, from SMS to live chat. Again, this regularity in execution is such a big help for agents to feel at ease in delivering quality service, leaving all sides of an agent-customer relationship feeling satisfied.

Helpful resource

Not sure where to start with developing your own scripts? Luckily, Gladly has devised helpful baseline templates for all sorts of channels that you can use as a jumping off point or verbatim:

- Call center scripts
- Live chat scripts
- Email templates
- SMS templates
- Additional script ideas and questions

Using natural conversations

The way agents communicate is critical to their ability to succeed. Script training establishes the basics, but you should provide resources that expand on that language so natural conversations feel less rigid. As our Customer Expectations Report showed, 58% of consumers would rather stand in line at the DMV than go through the frustration of contacting a live agent, indicating a desire for more accessible and personal experiences.

Script training establishes the basics, but you should provide resources that expand on that language so natural conversations feel less rigid.
The Right Tools for Your Team

Your support platform needs to be the best in order for you to achieve your goals of providing service-driven support and creating a healthy, sustainable workplace. Step into your service reps’ shoes and think: what tools do I need to succeed? What tools will help me feel more empowered in doing daily tasks? What will keep me from feeling burnt out or overworked?

Let’s run through a quick audit of your current platform and compare it to a leading support platform like Gladly.
Technical capabilities

- My platform foregoes tickets in favor of a **conversation-driven system** that takes a radically personal approach to service.
- My platform collects and grants agents fast access to **customer details** so they can reference shopper information on the fly during their interactions.
- My platform uses a single, scalable **knowledge base** where I can update information across my digital presence with one click and give agents the product resources they need to act as brand experts.
- My platform allows full access to the **omnichannel customer experience** from one centralized platform.
- My platform lets me incorporate tons of **integrations** into one dashboard so my team and I can manage the entire customer service experience from a single hub.
- My platform allows for nimble **payment** options so agents can help shoppers finish orders and close sales quickly on channels like chat and SMS.

Managerial capabilities

- My platform helps me as a manager easily access our **performance** metrics.
- My platform helps me simply and effectively manage my **workforce** from a single, centralized hub.
- My platform helps me and my team **easily collaborate** and share information on essential service tasks to make the work experience simpler and more engaging.

With Gladly, brands get quick access to personalization, product information, and a scalable platform in one affordable swoop. More importantly, Gladly puts the power back in the agents’ hands, with accessible tools that make the service experience better from day one.

Gladly puts the power back in the agents’ hands, with accessible tools that make the service experience better from day one.
Leadership Transparency

Your position as a leader naturally inspires a little trepidation in your team as to how much they can share with you and how much they can expect to be shared in return. That’s why it’s your job as a leader to create transparency between you and your employees.

Being more connected with your team is not just about sharing compliments and pleasantries. In fact, employees report 12 times higher job satisfaction in an organization with transparent communication. This high level of morale and interconnectedness in an office translates to greater productivity and more effective, quality service.

Source

Making Service Your Business A CX Leader’s Guide

12X higher job satisfaction
Setting Expectations on Both Sides

When employees know what's expected of them on a daily basis, they'll be more direct when discussing their assignments and even interests in bigger projects. Knowing where they stand is an important first step for employees to start to consider where they could be down the road.

Expectations for agents

Make sure you're providing the quality of service that you and your brand can be proud of by being deliberate about what each support agent needs to bring to the table from day one. This could include a lot of the important qualities and training we've already discussed, like product expertise, communication skills, flexibility in channels, and the overall ability to learn more as your brand scales.

Expectations for leaders

It's easy to create a list of must-haves for your team, but it's equally (if not more) important to be clear about what your employees should expect of you. This means making yourself available to agents whenever they need you, recognizing good work when it happens, and providing consistent updates on the state of the business as a whole.

On the agent level, it can feel like you don't have a voice in your company. As a CX leader, you have a responsibility to uplift your team's voices when they have important things to say — not just within your support center, but across your brand.

The most motivated, efficient workplaces have clear channels of communication that run through leadership, giving employees at all levels the opportunity to be heard. A communicative support center will give way to better service overall, having listened to the concerns of those who have boots on the ground.

There's no room for error when managing your support center. Without service-driven support, your brand could be leaving a lot of value on the table, and losing out on a major competitive advantage. You have the power and the responsibility to assemble a truly high-quality support center that leads with intelligence and confidence while building lasting relationships with customers that create value for your brand long into the future.
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 answers 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