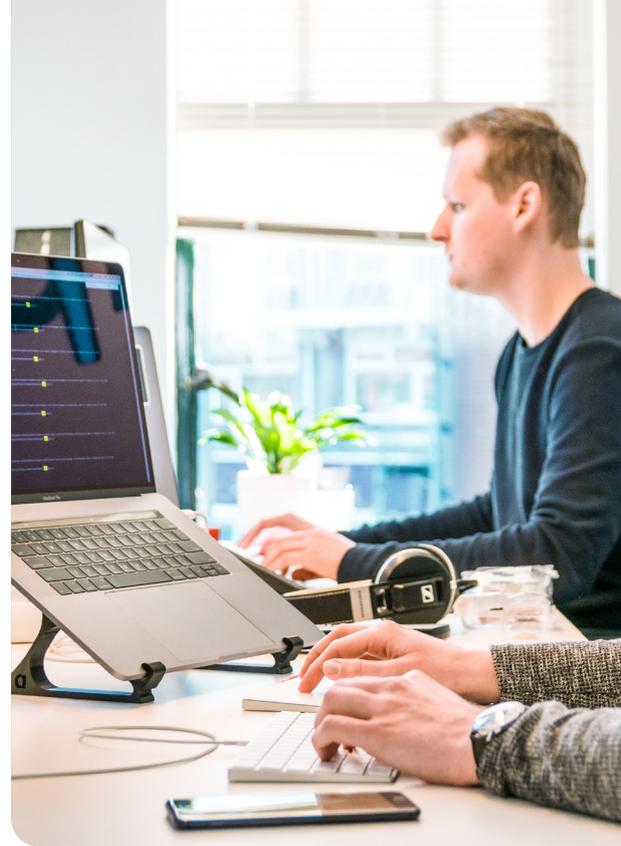


# The Ultimate Guide to Customer Support

# The changing face of customer support

Customer support has come a long way from the thinly staffed helplines with lengthy ticketing backlogs of old. That's no way for brands to deal with their most important asset – customers. Whether in e-commerce, consumer tech, or B2B SaaS, customer support is integral to the customer experience lifecycle.



Three trends in particular have changed how we think about CX over the last 20 years:

## 1. Speed, accuracy, and empathy

Consumers of financial services, on-demand services, e-commerce products, and travel and hospitality experiences have come to expect fast, accurate, and empathetic customer service as support becomes a vehicle for repeat purchases, positive social validation and referrals, as well as increased basket size.

## 2. Engagement across channels

Users expect brands to engage with them wherever they are - be it on desktop, mobile, or via a phone call. Managing support across multiple touchpoints has led to new challenges in building support teams that can handle the complexity of different incidents across different channels.

## 3. A focus on customer success

B2B and enterprise software has moved into the subscription era, with customer success emerging as a key driver for expansion revenue and customer referrals. Usage, engagement, and delight are important for the staying power of modern B2B products.

Here at Acquire, we care deeply about how our customers troubleshoot problems with their users, and how these conversations drive engagement and advocacy long after the initial sale.

This guide offers insights, best practice, and a strategic and tactical playbook on running customer support in the era of the modern consumer.

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# Who should be involved in customer support?

In an age when customer support has become an important differentiator between companies, every employee needs to contribute. Customer support provides key insights into building new features (product), improving messaging (marketing), and understanding customer personas (sales), just to name a few.

Keeping information flowing in the opposite direction also helps. For example, customer support teams should know:

1. What new features are in the pipeline (product)?
2. How current features should be described (marketing)?
3. When customers should be offered a new product to solve a problem (sales)?



Disney requires every new employee to learn the fundamentals of the Disney philosophy through Traditions Training. They even call their teammates “cast members” because they understand that everyone performs together, in service of the customer experience.



At the end of basic training at Zappos, a brand that has won numerous customer service awards, new employees are offered a cash reward to leave the company if they're not willing to live by the Zappos mantra, “Powered by Service”.



Fast-growing payments processor Stripe has every employee take part in customer support on a bi-weekly rotation. There are good reasons for that:

**1. Connection**

Employees learn about customers and how their work impacts real people.

**2. Encouragement**

It's a real morale-booster to successfully help a struggling customer.

**3. Product improvement**

Customer interactions help in understanding how to build a robust product for all eventualities.

**While different staff need different training based on their role, everyone—from the CFO to the warehouse team—impacts the customer. That means everyone needs to know about customer support.**



# Structuring a support organization

Customer support teams typically operate in either a tiered or hub-and-spoke structure.

## 1. Tiered structure

“Most customer calls are simple. For anything more complex, pass the customer to an expert.”

In the tiered structure, agents are divided into two groups:

**Tier 1** Consists of most agents who field all inbound chats, emails, and calls. They have general knowledge and respond quickly, solving simple inquiries through their product knowledge, call scripts, email templates, and links to company resources.

When Tier 1 receive a more sophisticated question, they escalate it to:

**Tier 2** A smaller team of more-experienced experts who are better equipped to provide precise technical support, describe nuanced product capabilities, and handle sensitive financial situations. Tier 2 agents have typically been with the company longer, and been promoted from Tier 1.

(At some large companies, some exceptionally knowledgeable experts sit at Tier 3).

PROS	CONS
Solve calls quickly without transferring customers.	Requires a large customer support team.
New customer support hires can get up-to-speed quickly as Tier 1 agents.	Interfacing between tiers can be tricky. Getting the ratio right is important so customers don't find themselves waiting around for an answer.
It's often possible to outsource part or all of Tier 1 work.	When inquiry volume is high or low, your Tier 2 will either be overloaded or underutilized.

“Companies that field predominantly simple questions favor tiered systems.”

“Thirty spokes share the hub of a wheel;  
yet it is its center that makes it useful.”

– Lao Tzu –

The hub-and-spoke model employs a small team of dispatchers (the hub) who field all inbound calls. After learning why the customer is calling, they pass them on to the appropriate specialized support team (the spoke).

In the hub-and-spoke model, most of the agents are specialized. Very few questions are simple enough to be answered by the dispatchers.

Some teams implement a computerized interactive voice response (IVR) as their hub, helping cut down on costs. With this approach it’s crucial to use a high-quality IVR. Poorly functioning automation can quickly decrease customer satisfaction.

PROS	CONS
More of the system can be automated (in some cases, the entire hub).	Handoffs can be tricky, especially with multi-area inquiries.
Requires fewer personnel.	Requires very thorough training before agents are up-and-running.
Team members can specialize in specific areas of expertise.	When inquiry volume is high or low, your Tier 2 will either be overloaded or underutilized.

“Companies that field mostly complicated,  
specific inquiries favor hub-and-spoke structures.”

#### A word on good leadership

Effective management is absolutely essential for efficiency, regardless of support structure. Establishing on-the-ground awareness of successful strategies and pain points helps improve the entire company’s processes.

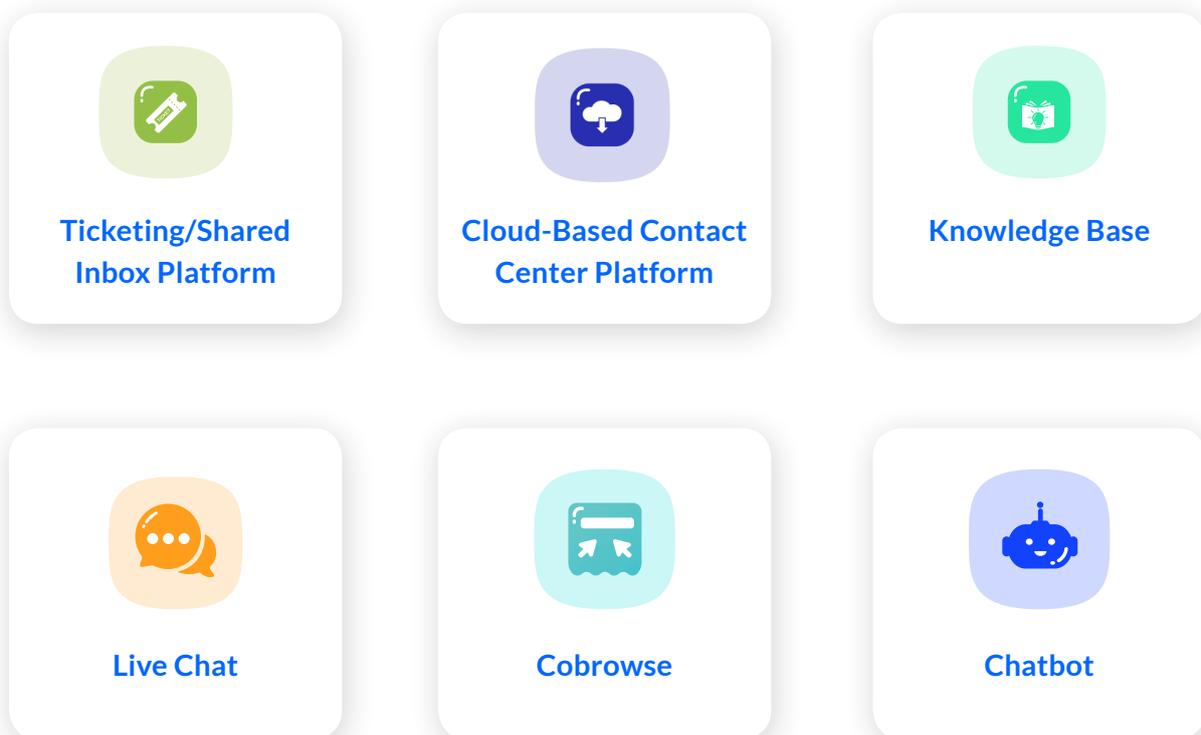
While needs vary between companies, 1 manager per 5-15 employees works as a good rule of thumb. Whenever possible, managers should be promoted from within to incentivize performance, maximize team cohesiveness, and boost morale.

# What should your customer support product stack look like?

Providing your support team with the right tools is as critical as setting up functioning team structures and workflows. A good support software stack helps retain customers by keeping them happy.

Your support stack is comprised of your chosen combination of support tools with individual features tailored to your needs.

When we've spoken with customer support leaders across industries like financial services, e-commerce and retail, travel and hospitality, and B2B/enterprise SaaS, we've typically seen the following product categories feature in their support stacks.



At the core is usually a ticketing platform (or its newer stepsister, the shared inbox). This allows for asynchronous written responses to support requests and cloud-based contact center software to route phone calls and run quality assurance on the responses. Larger B2C companies depend on both ticketing platforms, with the more urgent or persistent customers utilizing phone support.

Below, we'll dive into each category and highlight the top two or three vendors in each.

# 1. Ticketing and shared inbox

Ticketing software helps teams manage and respond to written customer support requests, like emails. As of 2019, emails were still one of the most common forms of business communication worldwide. Your ticketing software might also generate support tickets from contact forms on your website, social media, or texts.

A shared inbox can complement (or even replace) ticketing for some smaller teams. Shared inbox platforms support collaborative actions like multiple logins, form responses, re-assigning of emails, and commenting. Some also support social channels.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Zendesk	<ul style="list-style-type: none"><li>• Full-featured help desk platform</li><li>• Multi-channel/mobile ticketing</li><li>• View of all customer conversations</li><li>• Useful ticket-routing (such as skills-based)</li></ul>	Small business, mid-market, and enterprise
Freshdesk	<ul style="list-style-type: none"><li>• Full-featured help desk platform</li><li>• Intuitive interface</li><li>• Good ticket management</li><li>• Newer product, may be less customizable /scalable</li></ul>	Mostly small business and mid-market, with some enterprise
Front	<ul style="list-style-type: none"><li>• Shared inbox, more of a point solution</li><li>• Agent assignment functionality</li><li>• Can be used for multi-channel like SMS, chat and social</li></ul>	Small business with some mid-market

## 2. Cloud-based contact center platform

The call center is a fundamental part of many companies' support strategies. Customers still use the phone when they need help, seeing it as a quick way to get answers. But numbers are dropping. Forrester reported in 2013 that 73% of customers used voice with support, but in 2018, another report showed that 49% of all consumers (and 66% of millennials) were interacting with automated channels, like live chat.

Many companies still value the ability to address complex or urgent issues through a phone call. They have turned to cloud-based call center software (or call center out-of-a-box), which offers features like easy call routing, callbacks, an interface including customer records, compatibility with multiple devices, optimized queues, and video calls.

Voice/video is a valuable component of a support software stack. It adds a human element to customer support. But it is most useful in conjunction with other tools like cobrowse software, which empowers support agents to guide customers visually.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Talkdesk	<ul style="list-style-type: none"><li>• Full-featured call center</li><li>• Customizable with lots of integrations</li><li>• Offers reporting functionality</li></ul>	Mid-market and enterprise
RingCentral	<ul style="list-style-type: none"><li>• Full-featured call center</li><li>• Call routing in parallel and by topic</li><li>• Contact center is a newer product for RingCentral: some features still under development</li></ul>	Mid-market and enterprise
Aircall	<ul style="list-style-type: none"><li>• Full-featured call center</li><li>• Notably easy setup and use</li><li>• Integration with multiple apps and systems</li></ul>	Small business with some mid-market
Dialpad	<ul style="list-style-type: none"><li>• Full-featured call center</li><li>• Smooth call transferring/ forwarding</li><li>• May be superior for meeting enterprise call center needs</li></ul>	Mid-market and enterprise

# 3. Knowledge base

Adding an external knowledge base to your support software stack improves customer experience by providing quick access to information and filtering out simple questions. A knowledge base reduces call volume, allowing your representatives to prioritize tougher questions and maximize resources. For customers that want proactive support, a searchable knowledge base on web or mobile app is usually the best first step.

A knowledge base can also be used to collate internal knowledge for your support team (and the rest of your company). By providing a go-to for company knowledge, it quickly ramps up new team member training. Internal knowledge base software offers different specialties to external, like integration with other employee docs and portals.

More details around self-serve support through knowledge bases will come later in this e-book.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Acquire	<ul style="list-style-type: none"><li>• Offers multi-channel support</li><li>• Internal and external knowledge base integrates with chat</li><li>• User-friendly and customizable branding</li></ul>	Small business, mid-market, and enterprise support teams
Help Scout	<ul style="list-style-type: none"><li>• Offers multi-channel support</li><li>• External knowledge base integrates with email and chat</li><li>• Document editing "collision" detection</li></ul>	Small business and mid-market
Elevio	<ul style="list-style-type: none"><li>• Provides integration with other apps and chat</li><li>• SEO-optimized external knowledge base</li><li>• User-friendly and customizable branding</li></ul>	Small business with some mid-market
Guru	<ul style="list-style-type: none"><li>• Internal knowledge base software</li><li>• Smooth integration with Slack and other employee systems</li><li>• Accessible and intuitive search functionality</li></ul>	Small business, mid-market, and enterprise

## 4. Cobrowse and screen share

Cobrowse software is the ultimate customer engagement and support tool. With consent from the customer, an agent takes control of a customer’s screen and walks them through a process.

With cobrowse, your team can help customers navigate an online application or troubleshoot a complex software product. Direct demonstrations cut down on communication barriers. In many cases, cobrowse also allows the agent to fix an issue on the spot. If you don’t need a direct demonstration, screenshare and screen capture software let your agent share their own screen to assist a customer.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Acquire	<ul style="list-style-type: none"><li>• Cobrowse, live chat integrate with other support platforms</li><li>• Highlight, annotate and type/click, and switch pages for customers</li><li>• No downloads, can initiate in one click with opt-in</li></ul>	Small business, mid-market, and enterprise support teams
Glance	<ul style="list-style-type: none"><li>• Cloud-based “visual engagement” solution</li><li>• Offers screenshare, cobrowse and agent video</li><li>• Enterprise product with 100+ seat requirement for entry</li></ul>	Enterprise

## 5. Live chat for support

Live chat enables your agents to have multiple conversation threads at one time. Unlike 100% contact center based support, your agents can take on multiple requests simultaneously without sacrificing quality. Reports vary, but industry professionals estimate live agents can manage between 2-10 chats successfully. Support teams can also easily track customer questions in the history, or reach out to tell customers about a new release and answer live questions.

Not all live chat software is created equal. Be cautious: some products like Intercom and Drift are intended specifically for sales and marketing. These are priced much higher (per user and per contact session) than those designed for support, which are priced per seat only (per user). Acquire's live chat product, listed below, is designed for support.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Acquire	<ul style="list-style-type: none"><li>• Web and mobile live chat</li><li>• Video and voice calls via live chat widget</li><li>• Social media</li><li>• Send files and create forms</li><li>• Software specifically for support</li></ul>	Small business, mid-market, and enterprise support teams for financial services, insurance, e-commerce, and travel
LivePerson	<ul style="list-style-type: none"><li>• Chat solution for messaging platforms like SMS and Facebook Messenger</li><li>• Mostly designed for branding and customer engagement related to marketing</li></ul>	Mostly small business and mid-market, with some enterprise

# 6. Chatbots for customer support

Chatbots are computer programs powered by AI that interact with customers via a chat interface. They are a relatively recent addition into the customer support mix, but have quickly established themselves as a vital part of any comprehensive toolkit, providing cost efficiency and rapid responses to customer queries.

With an automated workforce there is no out-of-hours, so customers can get support whenever they need it; and with no limit to the number of simultaneous customer interactions you can automate, even if they all come at once, you're covered.

Chatbots can be programmed to address all common customer queries. Automating customer interactions in this way helps free up time for staff to focus on other work. Knowledge bases even benefit from the extra data input and the output data can be analyzed to provide helpful insights for driving the business forward.

PRODUCT	FEATURE HIGHLIGHTS	WHO IT'S BEST FOR
Acquire	<ul style="list-style-type: none"><li>• Import knowledge from FAQs and chat history</li><li>• Proactively engage qualified leads</li><li>• Robust routings</li><li>• Smart suggestions based on knowledgebase</li><li>• Performance data for analysis</li><li>• Integrate with CRMs and automatically push data</li></ul>	Small business, mid-market, and enterprise support teams for financial services, insurance, e-commerce, and travel
Intercom	<ul style="list-style-type: none"><li>• Code-free customization</li><li>• Proactively engage qualified leads</li><li>• Automatically triage conversations</li></ul>	Mid-market
Drift	<ul style="list-style-type: none"><li>• Qualify leads</li><li>• Route conversations based on rules</li><li>• Map answers into automation system</li></ul>	Small, and mid-size enterprise companies

More details around self-serve support through chatbots will come later in this e-book.

# The value of a holistic toolkit

There are a number of customer support tools available to businesses, and whilst they all have their use, their true value is only realized when they are incorporated into one interface. This makes it far easier for your support team to focus on providing stellar customer service, rather than spend all their time navigating through multiple products and windows.

It's important businesses don't operate in silos. Customers today expect to be able to pick up on conversations with companies wherever they left off, regardless of how and where they do it. Centralizing and sharing data between different tools allows for the kind of seamless omnichannel experiences that today's customers demand.

A joined-up support strategy such as this equips your enterprise teams to create the best possible customer support experiences, proactively resolving complex requests in real time across all channels and devices.



# Building internal workflows and planning for escalations

“For a workflow to be truly effective, it must be modeled around the customer.”

## ✓ A check-up on your customer support team

### 01 A customer has a problem

- ✓ Can customers easily contact customer support through whatever channel they prefer (email, chat, and/or phone)?
- ✓ Do customers have self-serve options, like a knowledge base or chatbot?
- ✓ Are all your channels interconnected, allowing easy identification of customers contacting you on a different platform later?
- ✓ Do you respond to initial inquiries in a time period satisfactory to your customers?

### 02 Your front-line support

- ✓ Is your front-line support solving a significant portion of customer inquiries?
- ✓ Are you tracking success/failure rates?
- ✓ Does your customer support team know when to escalate?

### 04 Escalating a request

- ✓ Does your software allow for seamless escalation handoffs?
- ✓ Are you losing customers at escalation points?
- ✓ If the customer disconnects, do your records allow you to return to the inquiry later?
- ✓ Are you seamlessly passing non-support questions to the proper teams (e.g. pre-sales questions leave customer support, instead going to sales)?

### 05 A holistic view

- ✓ Are you solving a sufficient percentage of customer queries in a timely manner?
- ✓ Are you reflecting on unresolved issues to develop new solutions?
- ✓ Are you tracking metrics to optimize the right KPIs?
- ✓ Are you isolating technical support bugs and passing them to your engineering team?
- ✓ Are your customers satisfied with your customer support, at each level, as well as end-to-end?

## Strategies for individual customer support personnel

When it comes to individual customer support agents, these practices help teams answer “yes!” to every question on the checklist:

### 01 Categorize and plan tasks

Customer support is necessarily reactive, so many agents find themselves jumping into situations. By beginning each day with a plan, however, they can prioritize the right tasks, break up their work so the most important elements get completed, and minimize cognitively expensive task-switching.

### 02 Prioritize in real time

If your support agent is improving your knowledge base and they receive a live chat, email, and phone call all at once, in which order do they respond? Prioritizing specific activities should be consistent, based on the answer to “Which delay would a customer find most acceptable?”

### 03 Have information readily available

The best customer support teams minimize follow-ups, so customer support agents need enough information available to solve most inquiries in one interaction.

### 04 Automatically record analytics

Data is the most useful way to improve performance, so tracking success rates and individual metrics should come naturally.



# Support team hiring done right

“It’s crucial to understand what your company needs before you begin hiring. There’s no one-size-fits-all solution.”

## Key questions to ask before you start building a team include:

What function will customer support play in the organization?

Does your company see customer support as churn prevention, revenue expansion, or both?

Some companies use customer service as an extra sales team, while others “focus on the customer, not the money.” Both scenarios benefit from high emotional intelligence and a service-oriented mindset, but the more you seek revenue expansion, the more you’ll need sales skills.

## 01 Quantity or quality?

Since budget is necessarily constrained, you’ll have to find your balance between a large, low-quality support team and small, high-quality one. (most companies fall somewhere in between.)

### To find your sweet spot, you really need to understand your customers:

1. Are customer inquiries many-and-simple or few-and-complex?
2. Do your customers favor fast responses over multiple engagements or would they sacrifice a slower response time to achieve a one touch solution?



## 02 In-house, outsource within the U.S., or outsource internationally

Since budget is necessarily constrained, you'll have to find your balance between a large, low-quality support team and small, high-quality one. (most companies fall somewhere in between.)

- **How technical is your product?**

The more technical the product, the more likely it is you'll want to keep customer support in-house. Technical, nuanced products can be complicated, even for internal agents, so it's wise to remain wary when considering international outsourcing, as issues like language barriers can be a problem.

- **How discerning is your user base?**

Using an inexpensive customer support workforce is only cost-effective if it doesn't negatively impact your customers. With a more discerning user base, in-house support is a safer bet (or, for more reliable outsourcing, hire a team in the U.S.).

- **How to train a team**

Once you've structured your customer support team, it's time to think about training.

### 01 Tactical intelligence

Tactical training teaches customer support agents how to go about problem solving. It's often company specific and done via manuals, walkthroughs, and basic templates.

That said, learning by doing is also useful. In addition to training materials, assigning agents real customer-support issues gets them up-and-running much faster. (Just make sure these are time-delayed interactions, like emails or chats—to avoid sluggish phone responses that may disgruntle customers.)

### 02 Emotional intelligence

Emotional intelligence (also known as “soft skills” or “EQ”) applies to the social element of customer support, its two main elements being empathy and social skills. These apply to questions like:

- How skillfully can an agent diffuse tense situations?
- How friendly are they?
- How helpful and kind does a customer perceive them to be?

Emotional intelligence is key to good customer support, but it's often undervalued. While hiring people with high EQ is key, the skill can also be trained. Useful methods include coaching, role-playing, and teaching an EQ framework.

# Support KPIs to know

Measuring and improving performance is as important as setting up your product stack and team structure. Depending on the size and depth of your support org, and the complexity of the tools you're using, you could be awash with useful metrics to help you do it.

But focusing on individual KPIs over your entire customer engagement strategy is putting knowledge over understanding. Instead, a range of different KPIs should build up understanding of your customer experience - and inform your customer engagement strategy as you continually learn and grow.

Below, we walk you through some of the most important KPIs for ticketing/shared inbox and contact center-based support.

## 1. Top KPIs for ticketing and shared inbox support workflows

<b>Number of Tickets</b>	The foundation for future customer engagement efforts. Knowing how many tickets your team handles on a daily (or hourly) basis will help you be prepared and understand where to put your energy.
<b>First Contact Resolution Time</b>	Shows how long it takes your team to resolve an issue after a customer first opens a ticket. If this is in hours, you're off to a good start - minutes, even better.
<b>Aggregate Ticket Resolution Time</b>	The average resolution time across all tickets, including updated tickets and new tickets.
<b>Customer Satisfaction</b>	If ticket volume is your foundation, customer satisfaction rates are the beams that will keep the building from crumbling. Many companies send emails asking for feedback after a ticket is resolved. Overall satisfaction and average customer satisfaction scores per agent should both be examined.
<b>Response Time</b>	Customers expect a quick response. Find your average time between addressing tickets to determine if you need to scale up your efforts.
<b>Agent Utilization</b>	The ratio of time spent on tickets versus other internal tasks. Aim for a higher ratio for a more effective team.

## 2. Top KPIs for contact center support workflows

<b>Calls Blocked</b>	The percentage of customers unable to reach support due to a busy signal. If it's high, more support staff are needed - or your tech needs upgrading.
<b>Average Time in Queue</b>	High wait time is almost certain to lead to dissatisfied customers. Research shows that most customers are not willing to wait more than a minute.
<b>After Call Work Time</b>	How long does it take to fully resolve an issue, even after the customer gets off the phone? If agents are spending more than half the length of the call wrapping up and reporting, a reexamination of your processes is in order.
<b>Abandonment Rate</b>	The percentage of total inbound calls abandoned due to long wait times, getting disconnected, or even pure frustration. If the percentage is too high, it may be worth exploring other channels for your customer engagement strategy.
<b>Agent Turnover</b>	Call centers may be notorious for high turnover, but you can mitigate this by providing great resources and clear processes. Addressing the cause of turnover helps.
<b>Response Time</b>	Customers expect a quick response. Get your average time between addressing tickets to determine if you need to scale up your efforts.
<b>Agent Utilization</b>	The ratio of time spent on tickets versus other internal tasks. Aim for a higher ratio for a more effective team.

# Automating customer support

According to a 2017 survey, more than 60% of consumers prefer an automated service for simple customer service tasks. As impatience and the demand for instant gratification continue to rise, demand for self-service does as well. Your company needs self-service support because customers want it.

While some companies employ unusual self-service tactics (like community forums), most self-service support is a knowledge base paired with automated messaging tools.

- **Knowledge base**

“A knowledge base is an online encyclopedia dedicated exclusively to your company. In it, customers can find answers on topics that would otherwise force them to contact your support team.”

## How to build a knowledge base

A knowledge base is for your customers, not you. Like any encyclopedia, your knowledge base should make it easy to find, read, and understand information. Follow these steps to get it right:

### 01 Review support transcripts and emails

By uncovering problems customers consistently experience, you can ensure your knowledge base provides helpful solutions.

### 02 Talk to the support team

Your customer support team has on-the-ground insights into customer workflows and the pain points that don't necessarily appear in text.

### 03 Search the internet

What are the most common questions that customers search about your company? What about your industry? Putting those issues front-and-center, you can solve most customer queries right off the bat.

## How to structure a knowledge base

Once you compile the right information, be sure to:

- 01 Organize it in a flow that feels logical to customers.
- 02 Use templates to standardize the information structure so every page shares a clear, consistent aesthetic.

Additionally, most companies find these common tactics helpful. Choose what works best for your company:

- Separate out FAQs from the rest of the knowledge base.
- Use screenshots and videos to demonstrate specific answers.
- Hyperlink within articles to other helpful resources.
- Test your knowledge base by using it to train your customer support hires.



# Automated messaging tools

Automated messaging tools, also known as “chatbots,” pair artificial intelligence with domain expertise to interpret customer queries and respond in real time. They make for faster response times and more satisfied customers.



## 1. Define your goal

Some chatbots are purely for customer support, while others can even sell pizza! Are you looking to resolve customer service issues or increase revenue? Perhaps it's both. Whatever the aim, define your goal early on so you know what is and isn't within your chatbot's scope.



## 2. Build content

Your most frequently asked questions will be most helpful to customers, so tackle those first before moving on to more nuanced ones.



## 3. Craft a voice & personality

Your company has a brand and personality - your bot should, too. Make sure it fits with your company culture and remains consistent.



## 4. Map customer journeys and build conversation trees

Your chatbot should be able to answer any customer question. Adding common customer responses as clickable options helps and also streamlines the experience.



## 5. Test your conversations

Your customers will deal with every interaction in the end, so it's important to make sure they all work properly.



## 6. Keep updating the bot, even after it's live

Keep updating your bot to improve it's helpfulness. For example, these two questions will keep it sharp:

- What's the last interaction a customer has before exiting?
- What customer problems is the chatbot failing?

# Meeting your customers on mobile

Over 60% of U.S. adults use a mobile device for customer support several times per month, and with mobile usage surpassing that of desktop, this figure is only set to grow.

Since customers are increasingly fed up with being kept on hold, with many even saying that “no wait time is acceptable”, more companies are adopting a “mobile-first” strategy, where any interaction—from retrieving product specs to acquiring customer support—can be completed from a mobile device.

Mobile-first support isn’t as simple as just “having a website.” Mobile customer support has its share of pitfalls though; here are some major ones to keep in mind:

## 01 Use a mobile-friendly support site

Most websites are designed to display on computer screens, so sometimes they render awkwardly on mobile devices. Look out for these issues in particular:

- Incorrect page display.
- Slow loading time.
- Cumbersome navigation.

If you find any of them, you have a problem with mobile responsiveness. Get your engineering team to tackle it as a first step towards improving your customer’s mobile support experience.

## 02 Optimize search for mobile

With a smaller screen, search becomes much more important. If you display any self-serve options, like a knowledge base or FAQ, it’s important to:

1. Have an easily accessible search option.
2. Ensure search options are helpful and mobile-friendly.

## 03 Optimize apps for mobile

Apps have entirely different user flows to websites, so they require a specific approach. Since customers can’t open new tabs, for instance, they’ll need a simple way to contact support, in real time, without losing their place.



# Structuring a support organization

## Case studies

More and more industries are providing customer support specifically tailored to their mobile users. Let's look at examples in two industries: health insurance and financial services.

### 01 Health insurance

With mobile usage on the rise, insurance companies have evolved—by offering mobile apps and mobile insurance cards for example. Along with these mobile offers, however, come inevitable mobile issues.

When a customer has an issue presenting their insurance card to a doctor, they need real time support. The standard support—long hours on hold—is completely unacceptable. As medical insurance grows increasingly complex, more high-quality, real time mobile approaches to support have been emerging, including chatbots.

### 02 Financial services

As mobile banking becomes more commonplace, the value of real time support increases. When a card is declined or a merchant has trouble processing a payment using a mobile card reader, customer support can be the difference between a successful transaction and failure.

That's why the American Express mobile app has a knowledge base and 24/7 team available via twitter, chat, and phone, all accessible before customers are required to log in.

Similarly, Wells Fargo's mobile app allows customers to access "Customer Support" from the dropdown menu on every page. From there, customers can access a knowledge base or reach out to customer support via phone 24/7.



# What does high caliber support look like?

To demonstrate the value of high-quality customer support, we spoke to two companies that achieve the gold standard.

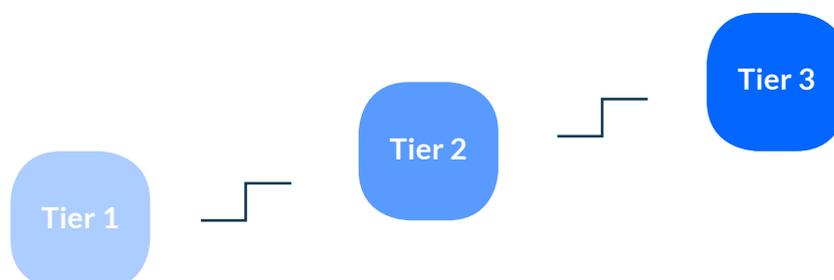
## SaaS company

One Fortune 400 SaaS company (who requested anonymity) provides support that revolves around a fundamental understanding of its value: since many SaaS solutions solve similar problems, they recognize that quality of service has a huge impact.

### Support structure

This company's support offers a self-service website followed by a tiered phone support system:

- Tier 1** agents provide troubleshooting, basic customer support, and escalation to Tier 2.
- Tier 2** agents are responsible for accepting Tier 1's escalations, fleshing out their validity, and resolving them when possible.
- Tier 3** agents are the membrane between customer support and corporate. These agents only escalate the most difficult situations (like bugs), which they pass directly to the engineering team.



In addition to this simple **Tier 1 → Tier 2 → Tier 3** escalation process, the company divides their support organization into two parts: agents deal with typical calls, while supervisors specialize in more difficult issues like disgruntled customers, billing issues, refunds, and special approval.

## Whizz Education

Whizz Education provides individualized math learning to customers in five languages across eight countries. They use gold standard customer support to ensure tutoring runs smoothly.

### 01 Whizz Education's support structure

Whizz Education's software isn't highly technical, so most of their inquiries are relatively straightforward. The company currently employs a single-tiered team of customer support agents and hasn't yet needed to grow more levels (or spokes).

### 02 Whizz Education's support workflow

Due to the nature of their product and the company's size, Whizz Education doesn't require many support escalations. However, there are still some cases. In these situations (such as customer-found bugs), a customer support agent notes the information and submits a ticket to the developer team to solve the problem.

Whizz Education credits much of their gold standard customer support to their tools, including the ability to share the customer's screen in real time. They're also quick to point out the value of their agent's emotional intelligence and "helper mentality." As their head of Global Customer Success puts it, "You can teach people technical things, but you can't teach them a positive tone."



# About Acquire

Acquire equips enterprise teams with the digital tools they need to create the best possible customer experiences. With features including secure cobrowsing, AI chatbots, live chat, and video calling, Acquire empowers teams to proactively resolve complex sales, service, and support issues across all channels in real-time. With Acquire, businesses can continuously engage customers while minimizing resolution time and redundancy. Acquire's flexible and scalable software suite meets the customer service, sales, and support needs of any business – on any device.

For more information, visit [www.acquire.io](http://www.acquire.io).

## Contact Us

- 01**  **San Francisco, CA.**  
133 Kearny street. suite 401,  
San Francisco, CA 94108  
hello@acquire.io +1 (415) 212-5151
- 02**  **Boston, MA**  
1 Lincoln St Boston,  
MA 02111  
hello@acquire.io +1 (415) 212-5151
- 03**  **London**  
New Kings Beam House, 22 Upper Ground,  
South Bank, London SE1 9PD  
hello@acquire.io +1 (415) 212-5151
- 04**  **Ahmedabad, India**  
1201, Times Square I, Opposite Rambag,  
Thaltej - Shilaj Rd, Thaltej, Ahmedabad,  
Gujarat 380059  
hello@acquire.io + 91 9823412519