

Mission-Critical Email Customer Service

10 Best Practices for Success

Introduction

When soda cans and chocolate wrappers start carrying email contact information, you know that email-based customer service is here to stay. This widespread adoption would seem to suggest that companies have discovered that emails are an effective and efficient way of communicating with customers. While it's true that customers often prefer emails to interact with companies as it saves them time and that companies encourage customers to use emails because emails are cheaper to handle than phone calls, it's also true that customer satisfaction with email customer service is abysmally low. Studies and reports talk of almost the same set of complaints over and over again: delayed or no replies, and poorly composed replies with inadequate or incorrect information. As a result, customers end up calling the company's 1-800 number with the same questions where agents often have no history of the earlier emails sent by the customers.

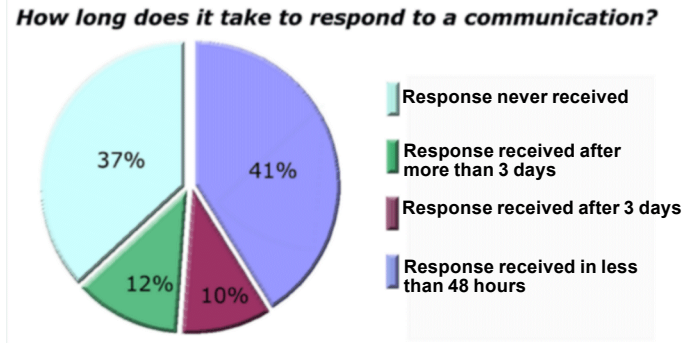
This gap between customer expectation and service levels at many companies is a result of two categories of misconceptions about email-based service. First, companies tend to view customer email management as an extension of personal email handling through Microsoft Outlook or Lotus Notes. Unfortunately, customer email volumes can easily overwhelm most personal email handling systems. Second, companies implement their phone-based call center management techniques in the email world without appreciating the important differences between the two channels. For example, a spike in phone calls into a call center can, at worst, result in unacceptable levels of abandoned calls—an undesirable outcome, but not a persistent one. On the other hand, thousands of emails that remain unanswered during holiday season cannot be wished away by the customer service team—they must be responded to, or the customer on the other end indefinitely stays on “hold.”

Is it that hard to make email-based customer service work? In this paper, we discuss 10 tried and tested ways of improving email interactions with customers. We focus here on achieving two key goals in email interactions: improving response time and quality. We also provide a checklist of capabilities to look for in an email management system.

1. Set, manage, and track customer expectations

The biggest complaint against email customer service is that companies take too long to respond or that they don't respond at all. Meanwhile, as email becomes more mainstream, customers expect quicker response from companies.

CustomerRespect.com recently released the *2002 Online Customer Respect Study of Fortune 100 Companies* (October 2002). The study shows that as many as 37% of Fortune 100 companies did not respond at all to emails or webforms submitted at their web sites. And, 83% of the surveyed companies did not notify customers that their communication had been received and would be acted upon.



www.CustomerRespect.com
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Results from a study by CustomerRespect.com, October 2002

Email, as a customer service channel, has an inherent drawback—as the interaction is not in real time, service cannot be provided immediately. Customers are usually willing to accept the delay as long as they know that their service request is being processed.

- Set up your email system to send automatic acknowledgments for all email and webform inquiries received. The acknowledgment must include the expected response time—track evolving customer expectations and customer-specific service level agreements to determine the optimal response time.

2. Monitor, Monitor, Monitor

Once you have determined the optimal response time, enforce it with capabilities such as:

- Alarms that are triggered if an inquiry is not handled within a specified period.
- Monitoring and reporting to track inquiries and measure agent performance.

A word of caution though—Focusing on handle times alone is one of the main causes of poor-quality email customer service.

3. Automate the service process with intelligent routing

Response times depend largely on how soon an inquiry gets to the agent best suited for handling it.

- Create webforms that customers can use to submit issues. Not only are webforms useful for gathering the information that agents need to solve problems, they also make it easier to classify inquiries and route them appropriately.
- Set up automated workflows to route emails based on the skill and workload of available agents, the nature of the inquiry, and the lifetime value of the customer.
- Make sure that your workflows allow agents to easily collaborate with subject matter experts. Agents should be able to forward emails and draft responses, and share internal notes. Supervisors should be able to track and monitor the inquiry at each stage.

4. Make complete customer information available to agents

Agents need complete information about customers through a simple user interface to be able to create rapid and satisfactory responses.

- Provide agents easy access to account and billing information, and interaction history of customers.
- Set up quick access to external data sources that agents frequently refer to while responding to inquiries. For example, a retail business that gets many shipping-related queries could provide its agents with a quick link to UPS tracking systems.
- In a multi-channel service environment, create an enterprise-wide view of the customer. A common customer information base allows customers to switch channels without starting all over again. And, it saves organizations significant amounts of handling time and effort.

5. Start small and grow a knowledge base

This is, perhaps, the most important tip of all. You'll discover that a comprehensive, up-to-date knowledge base is the answer to most of your service problems.

- Create a knowledge base that is easy to use and make it available—possibly even mandatory—across all communication channels. A common knowledge base means less knowledge creation effort as well as consistent customer service across channels, agents, and geographies.
- Start small. Analyze customer queries to identify simple, frequently asked questions (FAQs). Create high-quality responses for these questions. FAQs, typically, take care of almost 80% of customer queries—your agents can now focus on more complex and high-value inquiries.
- Create rich content using HTML and graphics to make the information attractive and easy to read.

- Create articles for not just the body of the email, but also other parts such as header, greeting, signature, and footer. Ideally, an agent should have to simply mix and match available information and not create new content while answering emails.
- If agents are forced to create new content, make sure it can be reused. Encourage agents to contribute to the knowledge base with incentives for sharing information. Agent submissions, combined with an approval workflow, can simplify the maintenance of the knowledge base.
- Track article usage closely to fine tune your knowledge base. Preferably, create a self-learning knowledge base.
- Set up your knowledge base such that content can be automatically personalized when the email is sent. This is particularly useful when agents reply to multiple customer emails with a single response.
- Associate keywords with each knowledge base article. This will make it easier to both search the knowledge base for information as well as gain insight into customer issues.
- Set up your email management system to auto-suggest responses from the knowledge base to speed up problem resolution.

6. Provide self-service access to the knowledge base

To gain even more mileage out of your knowledge base, publish parts of it on your web site.

- Encourage customers to search the published knowledge base before contacting you by email or phone. Your goal should be to effectively handle typical, frequently asked questions with self-service. You'll notice a significant decrease in agent workload and increase in customer satisfaction.
- Set up your self-service solution to easily escalate through a webform—with complete self-service session context—if the issue is not resolved.

7. Preempt customer inquiries through proactive communication

- Use the reporting capability in your email management system to spot trends and topical issues that are generating similar customer inquiries. For example, shipping delays due to logistic problems can and should be communicated proactively to all affected customers—this would avoid a slew of emails from your customers and improve customer satisfaction.
- Another effective way to enhance customer loyalty is to regularly communicate product and service news to the relevant customers using the group-email capability of your system. Of course, you must take explicit permission from your customers before sending them such emails.

8. Integrate email with other interaction channels

- Create and implement a clear and seamless escalation plan for each communication channel, so that the customer never feels lost. Customers should be able to walk into your store, call your agents, or go to your web portal with the confidence that their email interactions can be continued in any of these channels. Ideally, you should start customer interactions with self-service, which could escalate to email or chat. And, provide access to phone or onsite assistance for customers who are not satisfied with their self-service, email, or chat interactions.

9. Understand and respond to customer feedback and preferences

- Gain insight into issues being raised by customers, categorize them, and track trends using your email system's reporting and analysis capabilities. Make this information regularly available through automated online reporting to business decision-makers so that they can adjust service capability or product offerings accordingly.
- Integrate marketing and up-sell messages into service responses based on the category of the issue and type of customer. For instance, the customer would get a response with a hyperlink to a related promotional offer in the footer.

10. Use a proven solution

- In evaluating email management systems, start with those solutions that have been proven in a business environment similar to yours. At a minimum, look for the following capabilities:
 - 100% browser-based agent interface for easy deployment that is independent of location.
 - Categorization and intelligent routing of emails, auto-responses, and suggestions.
 - Workflow for outgoing emails to ensure regulatory compliance and quality control.
 - Secure messaging to authenticate customers before they view confidential information.
 - Access to complete customer interaction history, with out-of-the box integration with call center infrastructure and business systems based on open standards.
 - A searchable, self-learning knowledge base that is easy to create, use, and maintain.
 - A comprehensive set of monitoring, reporting, and archiving tools.
 - A scalable architecture to handle email volume growth.
 - Ability to handle multi-lingual content, where appropriate.
- If you wish to avoid the IT investment and system administration efforts, opt for a hosted email customer service application. Again, look for a vendor with a proven track record.

About eGain Communications

eGain (Nasdaq: EGAN) is a leading provider of software and services that enable knowledge-powered multi-channel customer service. Selected by 24 of the 50 largest global companies to transform their traditional call centers into knowledge-powered multi-channel contact centers, eGain solutions measurably improve operational efficiency and customer retention, delivering a significant return on investment (ROI). eGain eService Enterprise, the company's software suite—also available as a hosted service—includes applications for knowledge management, web self-service, email management, web collaboration, as well as certified integrations with existing call center infrastructure and business systems. Additionally, eGain offers a comprehensive set of professional services including business consulting, implementation services, 24x7 support, education, and training.

Headquartered in Sunnyvale, California, eGain has an operating presence in 18 countries and serves over 800 enterprise customers worldwide—including ABN AMRO, DaimlerChrysler, and Vodafone.

To find out how eGain can help you leverage customer service for competitive advantage, visit <http://www.eGain.com> or call us.

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