



10 STEPS TO EMPOWERED **CUSTOMER SERVICE AGENTS**

The new path to great customer service



10 Steps to Empowered Customer Service Agents

Organizations known for providing excellent customer experiences have at least one thing in common – they understand that the agents on the frontlines interacting with customers every day are one of the most important factors in delivering the kind of stellar customer service that people talk (and tweet) about. These agents' value cannot be understated, as they have the potential to create customers for life.

Yet many companies don't treat customer support agents as the crucial brand ambassadors they truly are, and, as a result, agent turnover increases. Estimates put turnover costs at approximately 50% of the agent's salary: 10% costs for recruiting a new agent, 30% for training, and another 10% for "nesting," or getting them fully onboarded. What causes agent turnover?



Four key missteps:

1. Lack of training
2. Lack of progress towards a long-term career
3. Lack of recognition
4. Lack of empowerment

Global organizations of all sizes understand the importance of customer loyalty – especially from a revenue perspective. In fact, a 5% increase in customer retention can increase profits by 25% to as much as 85%. But business leaders often talk about gaining more revenue per customer. So companies start focusing on cross-selling and upselling in order to get the customer to buy a second line of business and increase their share of wallet from customers.

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Introduction

What these business leaders might not understand is that the path to earning more revenue per customer must be earned by delivering a reliable, memorable customer experience – in other words, playing the long game for customer loyalty rather than focusing on short term profits. One of the keys to unlocking the incredible opportunities that customer loyalty provides is empowered, informed, happy customer support agents.

Not only do empowered agents feel more invested in your company, but their ability to impact customer loyalty is one of the single most under-appreciated sources of positive revenue impact for businesses today.

How can businesses stop the agent turnover machine in its tracks and build a customer support department that empowers each and every agent? In this e-book you'll learn 10 key steps.

Table of Contents

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- | | | | |
|-----------|--------------------------------------|-----------|---|
| 04 | Get a Seat in the C-Suite | 15 | Offer Agents Opportunities to Grow Their Career |
| 06 | Get Serious With Your CRM | 17 | Measure the Right Things |
| 08 | Have One CRM to Rule All Departments | 19 | Engage Them and Reward Them! |
| 11 | Allow Agents to Go Off-Script | 21 | Employ Victory Sessions for a Winning Routine |
| 13 | Help Agents Focus on What Matters | 23 | Keep Productivity Top-of-Mind |

Step 1

Get a seat in the C-Suite

If your executive offsites are missing representation from the customer service department, that's a big mistake, particularly considering customer service has overtaken price and product as the key brand differentiator. More companies are developing roles like a Customer Experience Officer, who help their organizations understand the power of an empowered agent addressing a customer issue at key points in the customer journey.

The CXO's role is to be the customer advocate – to tell their stories and convince other executives, like the CIO or CFO, that the end-to-end customer experience is a worthy investment. These individuals serve as top executives with the authority to design, orchestrate, and improve customer experiences across the increasingly complex range of customer interactions.

The CXO is about much more than fixing problems. The role is about accelerating growth by reorganizing around the customer and finding meaningful differentiators for the business beyond just price and product.



Step 2

Get serious with your CRM

By under-funding your customer service operation you are leaving your company highly vulnerable to customer churn. Customers are using a litany of channels to engage with your business – including social media, online portals, chat, messaging, and classic 800 numbers.

Businesses are often so eager to add new channels and stay in line with customer expectations that they offer new channels before they're actually equipped to serve them. As a result, the customer service department becomes a patchwork quilt of systems – one system for answering social media complaints, another for phone inquiries, and a third for mobile chat.



This leaves ample room for mistakes and agents are left trying to navigate these different systems rather than focusing on what truly matters – providing the appropriate service at key points of the customer journey.

When agents make mistakes due to siloed systems, customers fall through the cracks – the worst possible scenario.

With a plethora of choices at their fingertips, customers who feel ignored will surely take their business elsewhere.



Step 3

Have 1 CRM to rule all departments

In addition to aligning your customer service department around one system, the entire business should work from a single CRM system. Unfortunately, many businesses have tackled optimizing their sales processes with cloud software (sales force automation) at one point in time, and their customer support solutions at a different time.

The result is silos that create a disconnected customer experience because businesses lack the 360-degree view they need of each individual customer.



The worst-case scenario is when a customer has to contact separate departments in order to address various problems in the customer cycle – there's a billing department, a department for product questions, and a separate department for new customer onboarding.

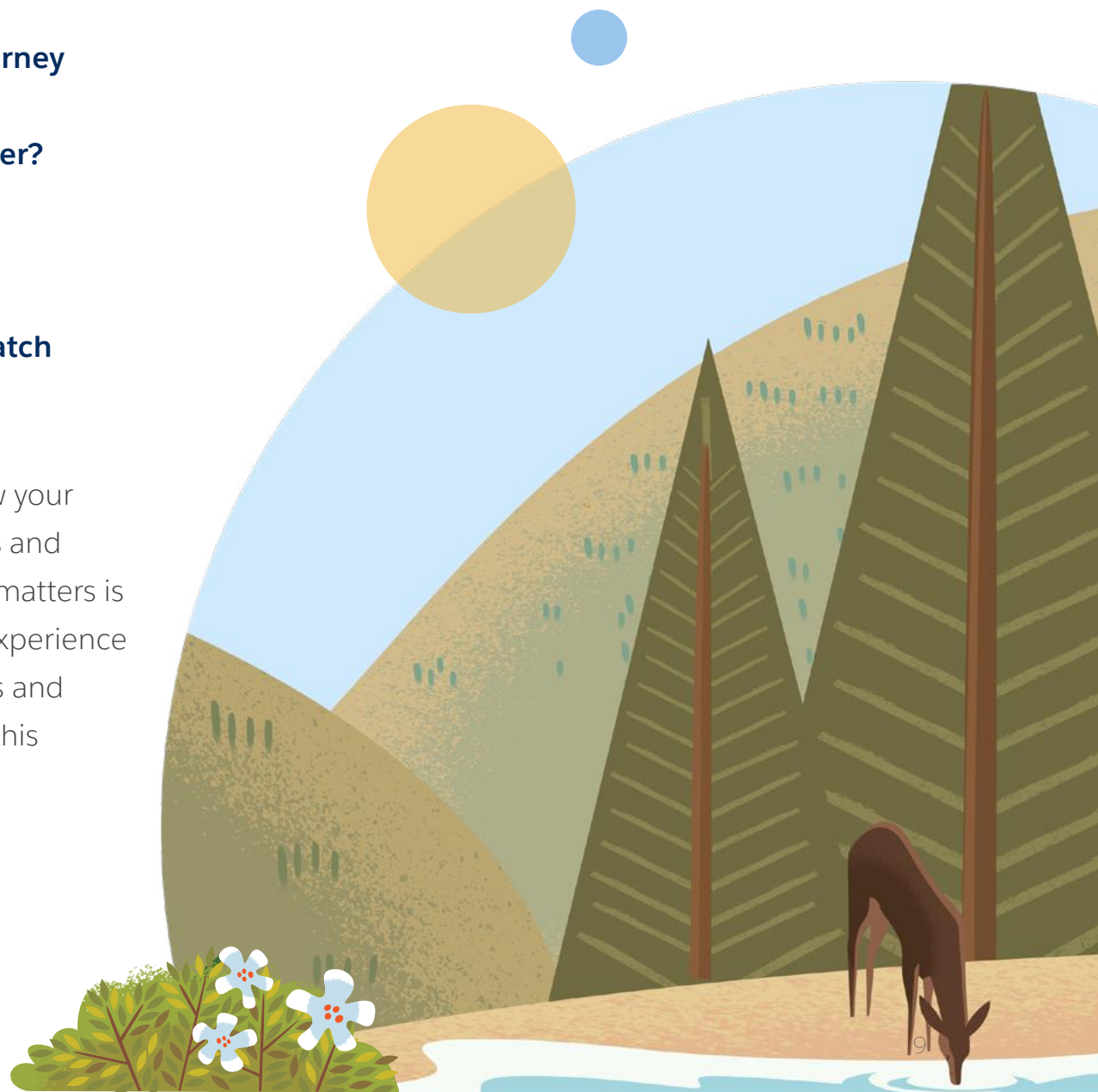
Unfortunately, this worst-case scenario is the reality for many companies: customers demand a seamless experience and will leave if that's not what they get. No matter who in the organization the customer talks to, they expect the agent will have the right background information to solve their problem the first time – no follow-up calls needed.



That means agents need a complete view of the customer across all departments and must be prepared to answer key questions like:

- **Where is this customer on their journey with the company?**
- **How long have they been a customer?**
- **What have been their past service experiences?**
- **What products do they own?**
- **What products might be a good match for cross-selling and up-selling?**

Today's connected customers don't care how your infrastructure is set up, or whether your sales and service teams use different systems. All that matters is a single, seamless, and pain-free customer experience that's relevant to their needs. But siloed sales and service systems are not equipped to deliver this connected experience.



Step 4

Allow agents to go **off-script**

You can hire a team of smart agents, train them well, and compensate them fairly. But when agents are chained to a script from which they are not empowered to deviate, conflict can arise quickly.

The connected customer certainly doesn't view themselves as one-size-fits-all and can sniff out inauthenticity within minutes. They demand personalized experiences, but scripts can be the antithesis of personalization.



Agents are often given scripts that they have to follow, but that leaves no room for them to make judgement calls in the moment based on the individual customer. Customers dealing with more complicated issues already know they must often speak to multiple support agents and move up the chain before they can speak to a manager who is qualified to actually help them. If a customer has to repeat their issue with multiple agents, you're doing something wrong.

It can seem a bit nerve-wracking to let agents go off script, but brands need agents who can think on their feet and make sound decisions on the fly. Instead of a seemingly never-ending rule book, have a few principles that focus on one primary goal: create happy customers who tell others about their service experience. [Surveys show](#) that 69% of customers believe their customer service experience improves when agents don't sound like they're reading a script.



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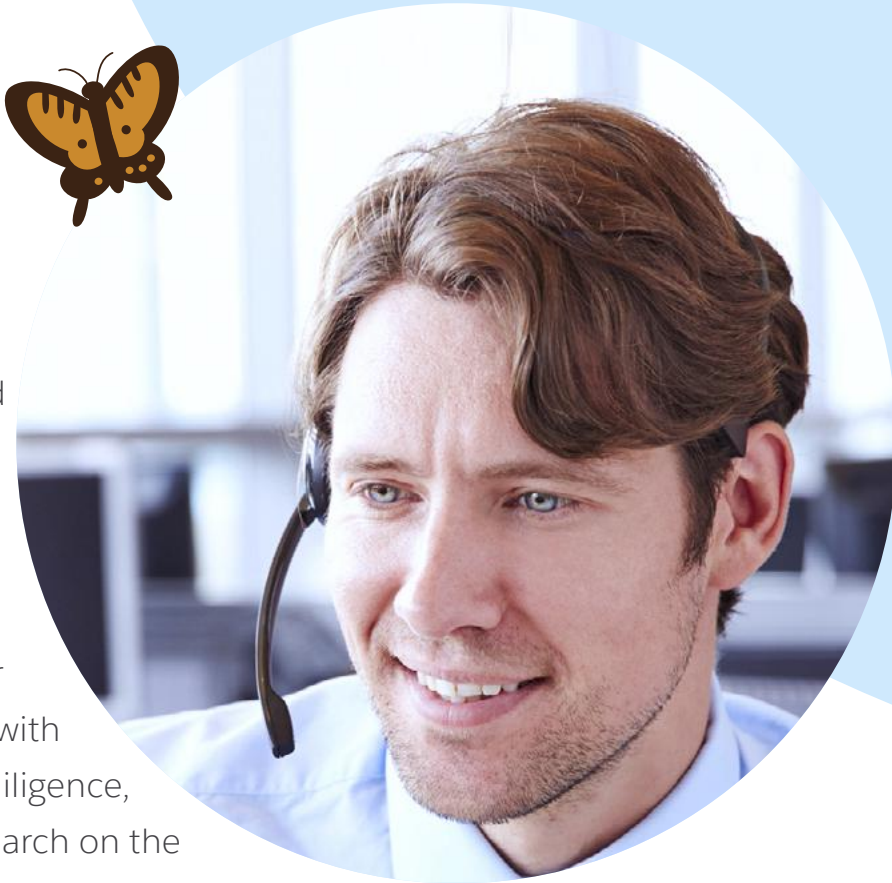
Step 5

Help agents focus on what matters

Many customer service calls are questions that agents have answered time and time again. You've spent the time and money to hire and train the best agents you can get, but they're wasting their time answering questions anyone could answer.

Customers increasingly want to answer questions on their own rather than take the time to send an email or wait on hold. Arm customers with as many easily accessible resources as possible to do their own due diligence, such as a knowledge base and self-service community. Do some research on the most frequently asked questions and start building the knowledge base – but don't forget to continue to update the system as additional FAQs arise.

A full [self-service portal](#) takes this one step further –enabling customers to help themselves and each other. Customers can post questions in the community and collaborate with other customers via comments to get to the best solution, freeing up agents to use their experience to tackle tougher cases.



Step 6

Offer Agents Opportunities to **Grow** Their Careers

Often support roles can feel like a stepping stone to bigger, better things (probably at a different company). It's no secret why – historically, customer service jobs have had little to no upward mobility and limited training opportunities.

The customer service landscape is expanding dramatically as customers increasingly prefer to send a tweet or use in-app video chat to receive service, and their expectations for speed and personalization are growing. This offers incredible opportunities for service agents to expand their arsenal of skills beyond just engaging in a phone conversation.

Training should occur more frequently than just the first week a new agent joins the team. Additionally, open up existing leadership training opportunities to all your employees – including your support team.



Step 7

Measure the right things

Customer service has changed dramatically, but many businesses are still using the same outdated metrics to measure success. Focusing on metrics like agent handle time and agent wrap-up time gets in the way of providing excellent service.



Both metrics measure agent productivity – handle time measures the number of minutes an agent spends on the phone with a customer, and wrap-up time measures the time required by an agent to complete work directly associated with a call after the call has ended. However, neither metric indicates if the customer had a positive experience with your company. Customers would certainly prefer to be on the phone for less time, but not at the expense of first call resolution.

That's not to say that agent productivity isn't important. It's absolutely crucial to keep your agents productive, and that's what tools like Service Cloud help businesses do. But to prioritize agent productivity as an indicator of success above all other metrics is a big mistake. So what should businesses look at instead? Metrics like CSAT, Net Promoter Score, or Customer Effort Score are better indicators of the customer experience, rather than **just** the agent's speed. Speed is great, but customers would prefer to get the right answer than an incomplete one, even if it takes a few extra minutes.



Step 8

Engage and reward!

There is plenty of buzz surrounding gamification in sales, but the same tactics can benefit contact centers as well. While targets may differ between sales and customer service teams, motivational techniques don't have to. By bringing in real-time contests, reps can engage with colleagues, strengthening company culture and improving agent morale. Gamification brings an element of fun to an occasionally monotonous job.

Reward employees for a job well done and be certain the rewards can be put to use outside company walls. Be it tickets to local events or gift cards, make certain your rewards recognize that your team has a life outside the office and you're happy to help make that life more exciting. Additionally, turn quality reviews into episodes of catching agents doing something right, rather than scrutinizing where they may have deviated from a script that can be an impediment to customer success.



Step 9

Employ victory sessions for a **winning** routine

A victory session is a 30-minute meeting every 2 weeks where a team goes around the room with each member telling about the wackiest customer or toughest situation they successfully handled. Four things happen at once in this meeting:

First, the agent gets recognition for a job well done and even the lowest performer gets peer and supervisor recognition.





Second, education occurs – the agent describes how they explained the warranty to the customer so that the customer accepted it. Everyone now has a new word track on that issue.

Third, empowerment is reinforced. When a team member describes how they used their empowerment and gets a round of applause, it reinforces with others that the empowerment is real.

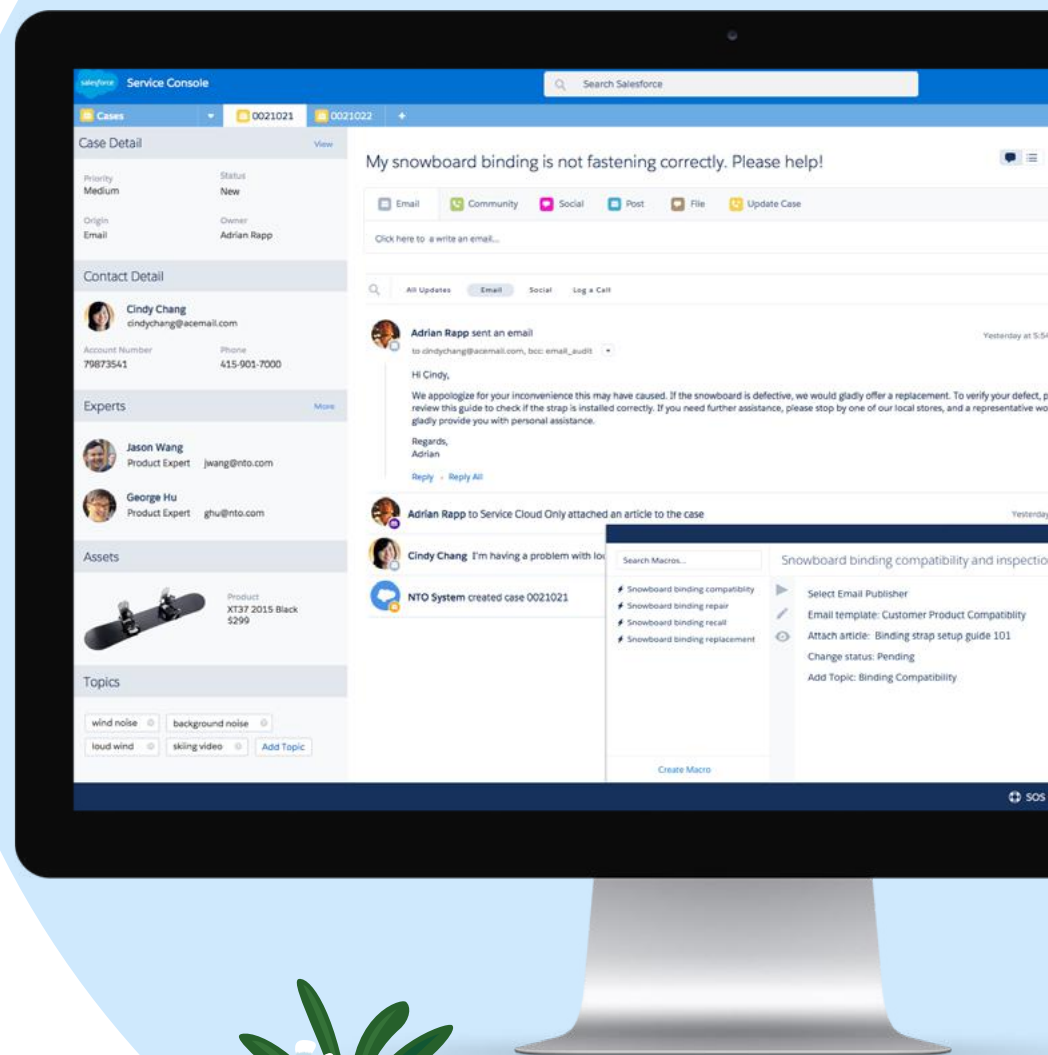
Finally, the process creates an informal incentive to go the extra mile. The next time the agent encounters a difficult customer, they think to themselves, “This would be a great story for next Thursday, but I’ll only be able to talk about it if I can successfully handle this situation.”



Step 10

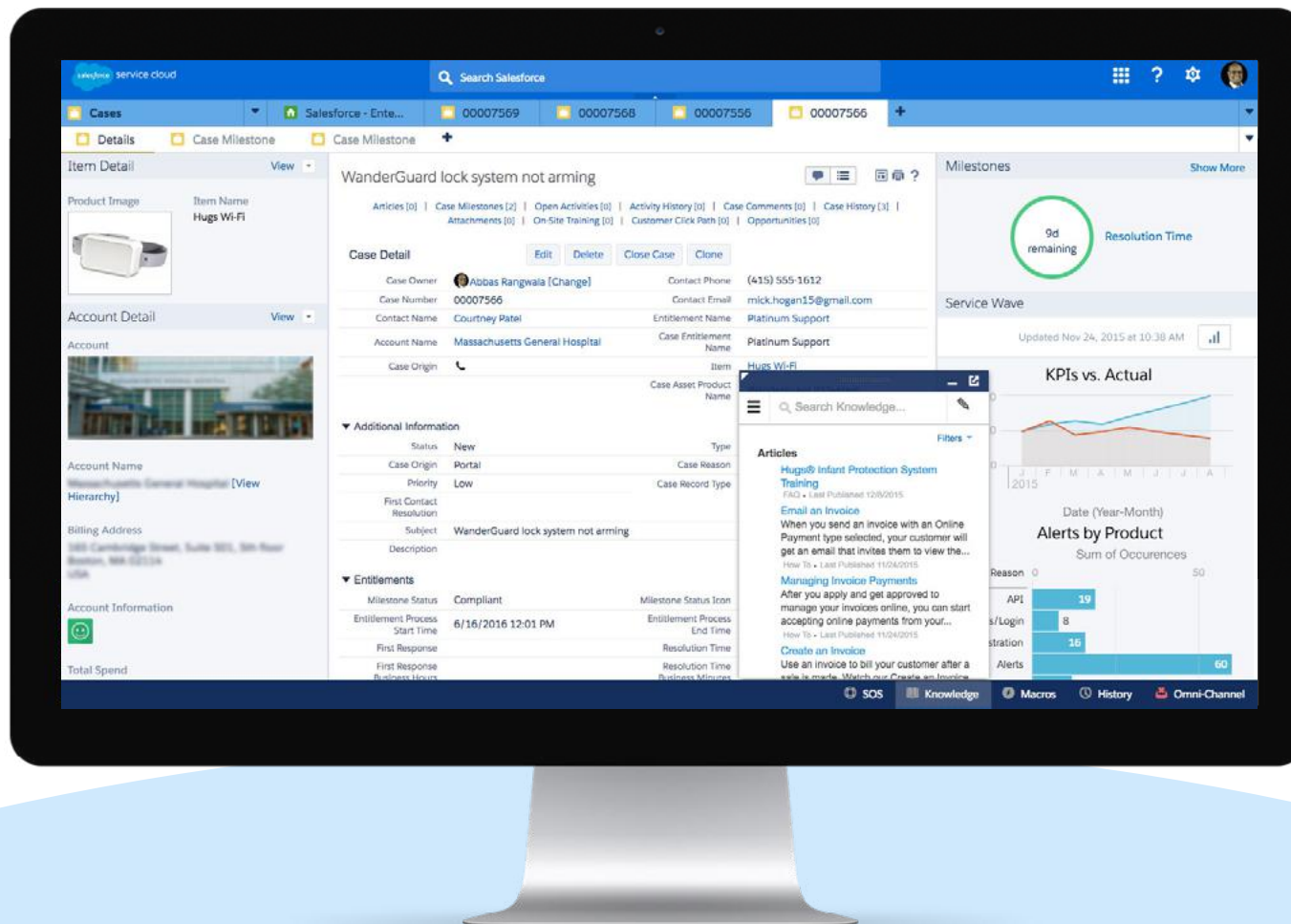
Keep productivity top-of-mind

It's impossible for agents to know absolutely everything to answer every question – even the most powerhouse agent will come across a tricky case every now and then. But when the clock is ticking and your customer is looking for answers, you need technology to step in and help. Tools like [Service Cloud](#) do the heavy lifting for you by automating tedious tasks and business processes and delivering the right information instantaneously. With knowledge articles, subject-matter experts, and extensive customer profiles right at their fingertips, agents have what they need to deliver a complete, personalized answer to every customer inquiry, lightning fast.



The Agent Workspace unifies the entire agent experience at the agent's fingertips – cases, customer history, and dashboards are all available in a single console, no toggling across multiple tabs required. Your business already has the data it needs to create a 360-degree view of customers; it's just a matter of putting it in the hands

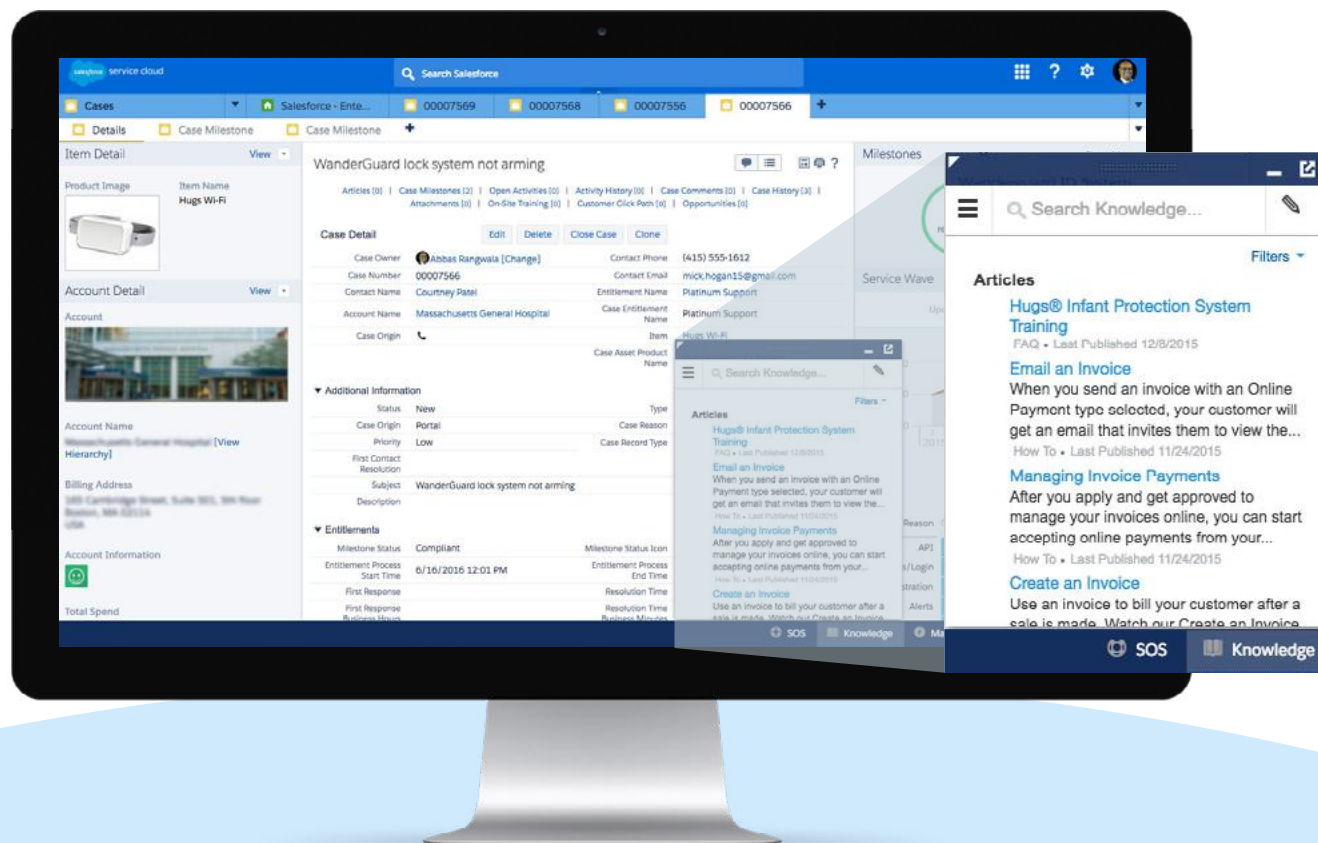
of the agents, silo-free. Regardless of whether a customer contacts the business via live chat, messaging, or phone call, the agent never has to navigate away from the Agent Workspace.



When a case is received, the console surfaces the customer's profile, purchasing history, and account information, all in one place. Customers can expect the same unified experience regardless of channel. Depending on the case, agents can also access knowledge articles and subject matter experts directly from the console. The Agent console also learns from your actions the more you use it, intuitively putting all

of the most frequently used actions right where agents need them most.

As brand ambassadors, agents' experience should be as simplified as possible so they can productively focus on what truly matters – building stronger, personalized relationships with customers.



Conclusion

Customer service agents are a vital part of the overall customer experience. Every case they quickly resolve builds brand loyalty and attracts customers for life.

Far too many organizations fail to appreciate their customer service agents and do not show them paths to grow their careers beyond hitting certain metrics. As a result, agents don't feel empowered in their day-to-day operations. Empowering agents does more than boost employee satisfaction – it creates opportunities for agents to drive personalized customer experiences, which grows your business and generates more revenue.

Customers expect a service experience that is fast, smart, and personalized. Thriving support teams excel by not simply meeting but rather exceeding customer expectations, which requires empowered agents with the right training, tools, and resources at their disposal. By centralizing the business around the customer, your company will succeed in delivering the exceptional service that separates you from competitors and transforms customers into brand advocates.

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