Online servicing Implementation Guide

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These materials are most effective when used in association with the book Digital Marketing Strategy

DIGITAL MARKETING STRATEGY

Online servicing Implementation Guide

This guide is designed to give you a step by step guide to implementing your online servicing strategy.

Other guides are available for other digital marketing channels. To best understand how this fits into your broader strategy see the book Digital Marketing Strategy by Simon Kingsnorth.

How it works

The guide is designed to be as easy to use as possible. Each guide is broken down into simple, key steps to take to ensure your strategy is as effectively and smoothly implemented as possible. So less of this chat and let's get to the detail.

1 Understand servicing principles

A successful digital strategy doesn't operate in a silo, but is rather fully integrated into all parts of your business. This is especially true for customer service. No matter the reason they are interacting with you, customers expect to be treated well and have their problem solved quickly by people that know what they are talking about. Social media has revolutionized customer service by allowing companies to communicate directly with customers directly, in front of others.

Even technical decisions like whether your website includes an AI chatbot online 24/7 or offers secure messaging when logged in, or simply displays a contact number, are now service decisions that affect UX, perception, and satisfaction.

2 Understand your customer

There are two ways to think of your customer in the context of online servicing. The first is a part of a larger trend. Studying the trend gives you a broad idea of common issues customers face and can show us where we have done good well.

Analyse your data from key touchpoints like the call centre, service e-mail or other communication methods to find what the common customer struggles are. An unusually high funnel drop-out rate in Germany could mean your website is having a technical difficulty there or that you have failed to offer an alternative payment method to accommodate the scarcity of credit cards there.

Understanding your customer on an individual level is something 21st-century consumers are increasingly expecting as a baseline for engagement. Even when knowing your customer personally is logistically impossible, CRM platforms and service tools can store interactions, flag known issues, and integrate with social and knowledge systems. Having the knowledge and context for previous problems not only helps solve the current problem faster, it makes the customer feel like their individual needs are important to your company. See Chapter 16 - Personalization for more on this.

3 Be responsive

Consumers have come to expect a near-immediate response to their inquiry. This may not be possible given the volume and nature of most inquiries, but one easy cheat is to acknowledge the message immediately. An automated acknowledgement message, personalized where possible, sets expectations and often is enough to keep a simple complaint from escalating into a serious issue. AI can help to analyse the sentiment of messages from customers and allows you to better position your response.

4 Be transparent

Being transparent in your dealings projects trust in the public and a willingness to be vulnerable. 21st century consumers value that. Because of the enormous amount of turnover, product sourcing and working conditions information available online, it is becoming less and less advantageous to keep all your cards close to your chest. Regulators are increasingly releasing potentially damaging details when they punish organizations, which further reduces the benefit in hiding. Avoid deleting online comments or content simply because you disagree - keeping an open, honest forum is vital to success. Engage with users and take the issue offline to resolve it.

5 Demonstrate empathy

Most people use tone of voice as a proxy for empathy. The tone of voice you employ should fit your brand, but more importantly should make customers feel as though you understand them. This greatly reduces frustration and complaint escalation while building loyalty and good will.

Banks, heritage businesses and government departments often use a formal tone to portray reliability and politeness, but are often perceived as being uncaring and cold. A friendly, conversational tone is more direct and uses plainer language. When not deployed correctly, it can come off as flip and over-familiar.

6 Demonstrate knowledge

Knowledge is looking inwards, rather than out. When a customer has a question, they want an answer, not the next line on the script. When the help team on the phone or online doesn't really know your product or service, frustration goes through the roof, creating more and larger problems than necessary. Think of the difference in experience between trying to find a small plumbing part at a big box hardware store vs. your local plumbing shop. Internal knowledge is important- your team needs to be experts in your product or service. That means investing in regular training, maintaining a robust knowledge base, and ensuring that all help content is accurate, relevant, and up-to-date.

7 Be consistent

We've all experienced the endless redirection to different departments, having to explain the situation anew and each time getting a different answer or the same person in the same department giving different answers on different days. It's infuriating.

Making sure your service approach, approach, language, training, documentation, service levels and systems remain consistent no matter when, how or to whom your customer inquiries is vital.

8 Review your service channels

Just because there are a near-infinite number of communication channels available doesn't mean all of them are right for your business. Online content answers common questions and provides other information (how-to guides, product specs, manuals) intended to circumvent the need for customers to inquire at all. Actively mentioning the help zone when customers make a purchase is essential.

Live chat works best when questions are reasonably straightforward and agents have good product knowledge. It is also a handy platform for users without a solid command of the business language, as it allows time for translation assistance. Chatbots function similarly, but may struggle with complex questions. AI chatbots can usually handle about 80% of customer engagements. IVR (interactive voice response) is common in customer service, and this is likely to expand as technology advances further. Voice help through Amazon Echo or Google's Alexa is rapidly growing in popularity, as is voice help through IoT devices.

Communicating with customers with messaging apps such as WhatsApp, Facebook Messenger, and WeChat is also becoming more common, with the advantages of already being ubiquitous and familiar to the user. The downside is a disaster on messenger is likely to be taken more personally than it would be via a traditional help desk. You should also stick to service channels that are relevant and appropriate for your business model and audience.

Forums are one of the oldest features of the internet and are still popular today as a low-tech means of finding community and answers to problems. Depending on your niche, it is possible that there are many customers that have as much, if not more knowledge about your products than your customer service people.

Email customer service is also quite established and has the advantage of allowing customers to fully explain the problem and attach images and other relevant information. There are also no conversation expectations, which is often a relief for both sides. Automated replies reassure the customer that their message went to the right place and set response expectations.

While callbacks are frustrating for customers looking for an immediate answer, they do give all the power in the complaint relationship back to the company. Giving 30-minute windows helps customers feel like their time is also valuable.

Co-browsing, when two or more people look at the same web pages at the same time, but not on the same device and almost never in the same location. This is often a secondary tool, used when live chat or the telephone isn't quite working. Upselling, while possible in this scenario, should not be the primary goal.

9 Social customer service

Customer service on social media channels has an extra degree of difficulty because it is usually carried out in full view of the entire internet and will exist online for the rest of time. This is great when things go well – customer service success stories are immensely shareable. When it goes wrong, it can be a near instant disaster as other users pile on and share the incident with their networks, where it may go viral or even become newsworthy.

Social media is often handled by the youngest people in the PR or marketing teams, which means they may not have the years of customer service experience that can help them weather a storm. This problem should fix itself as ownership of social media handles moves away from the marketing department to somewhere more relevant. Another difficulty is that people expect and even demand a response within minutes. As the barriers to exit continue to shrink, responsiveness becomes more and more important.

When it's working well, social customer service deals with more resolutions per hour than calls, significantly lowering the cost per interaction. Not all complaints are made directly, however. Tracking your brand name on social platforms gives you the chance to respond to mentions, negative or positive. Acknowledging positive comments can be just as powerful as responding to negative ones.

10 Measuring success

The key metrics in online customer service are content engagement, hold time and abandonment, response time, first-contact resolution and net promoter score (NPS). Content engagement is measured with a number of metrics (click or view-through rate, page share, downloads, likes) and gives valuable information about customer behaviour that can head off complaints at the pass. Web and social analytics platforms will have built-in tracking and reporting and may be integrated into CRM systems or service platforms.

Hold time and abandonment apply to live chat as well as call centres. First-contact response, the percentage of inquiries that are dealt with by the first person a customer contacts, measures the quality of your response.

NPS, a concept developed by Frederick Reichheld, works by asking customers to answer the question “On a scale of 1 to 10, how likely are you to recommend X” (X is what you would like to measure). People who score 9 or 10 are considered promoters, 7 or 8 are passives and all others (6 and below) are detractors.

By averaging out the score you can understand if your business really is delivering satisfactory outcomes. Not everyone is a fan of the system, but it is fair to say that NPS is a sensible guide to customer satisfaction, particularly when used in tandem with metrics like customer lifetime value and churn.