# Mission-Critical Email Customer Service: 10 Best Practices for Success

## Introduction

When beverage containers and candy 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 email messages are an effective and efficient way of communicating with customers. Although it is true that customers may choose email as their preferred channel to interact with companies because it saves them time and that companies encourage customers to use email messaging because these messages are less expensive to handle than phone calls, it is 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 contact center with the same questions, and agents often have no history of the earlier email messages that the customers sent.

This gap between customer expectation and service levels at many companies is a result of two kinds of misconceptions about email-based service. First, companies tend to view customer email management as an extension of personal email handling through standard email applications. 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. On the other hand, thousands of email messages that remain unanswered during holiday season cannot be wished away by the customer service team—they must respond to these messages, or the customers on the other end wait indefinitely.

Is it that hard to make email-based customer service work? This paper discusses 10 tried and tested ways of improving email interactions with customers. We focus here on achieving two important goals in email interactions: reducing response time and improving 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 about email customer service is that companies take too long to respond or they do not respond at all. Meanwhile, as email messaging becomes more mainstream, customers expect quicker responses from companies.

Email messaging, as a customer service channel, has an inherent drawback—the interaction is not in real time, and 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.

You should:

- 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 response time.

### 2. Monitor, Monitor, Monitor

After you determine the response time, enforce it with:

- Alarms that are triggered if an inquiry is not handled within a specified period
- Monitors and reports that track inquiries and measure agent performance

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

### 3. Automate Service Processes with Intelligent Routing

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

- Create webforms that customers can use to submit their concerns or questions. Not only are webforms useful for gathering the information that agents need to solve problems, webforms also make it easier to categorize inquiries and route them to the agent best suited to solve the problem.
- Set up automated workflows to route email messages 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 email messages, 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. You should:

- Provide agents easy access to account and billing information and the 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 multichannel service environment, create an enterprisewide view of the customer. A common customer information data 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 tip is, perhaps, the most important tip of all. You will discover that a comprehensive, up-to-date knowledge base is the answer to most of your service problems. You should:

- Create a knowledge base that is easy to use and make it available. You could even make its use 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 percent 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 message, but also other parts such as header, greeting, signature, and footer. Ideally, an agent should be able to simply mix and match available information with a few mouse clicks instead of having to create new content while answering email messages.

- If agents are forced to create new content, make sure it is reusable. 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 message is sent. This feature is particularly useful when agents reply to multiple customer email messages with a single response.
- Associate keywords with each knowledge base article. This system will make it easier to both search the knowledge base for information and gain insight into customer concerns.
- Set up your email management system to auto-suggest responses from the knowledge base to accelerate question resolution.

### 6. Provide Customers Access to the Knowledge Base

To gain even more mileage out of your knowledge base, publish parts of it on your website. You should:

- Encourage customers to search the published knowledge base through your corporate website before contacting you by email, chat, or phone. Your goal should be to enable customers to find information regarding frequently asked questions through their own searches of the web. You will notice a significant decrease in agent workload and increase in customer satisfaction.

### 7. Preempt Customer Inquiries Through Proactive Communication

You should:

- Use the reporting capability in your email management system to spot trends and topical concerns 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 practice would avoid a large number of email messages from your customers and improve customer satisfaction.
- Regularly communicate product and service news to relevant customers. Of course, you must obtain explicit permission from your customers before sending them such email messages.

### 8. Integrate Email with Other Interaction Channels

You should:

- Enable customers to walk into your store, call your agents, or go to your web portal with the confidence that they can continue their email interactions in any of these channels. In addition, your customers should have access to the channel of communication they prefer—email, chat, or a telephone conversation—and have a smooth experience between channels.

### 9. Understand and Respond to Customer Feedback and Preferences

You should:

- Gain insight into concerns that customers are raising, categorize them, and track trends using the reporting and analytics capabilities of your email system. 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 concern and type of customer. For instance, include a hyperlink to a related promotional offer in the footer of email responses.

## 10. Use a Proven Solution

In evaluating email management systems, you should start with those solutions that have been proven in a business environment similar to yours. At a minimum, look for the following capabilities:

- A 100-percent browser-based agent interface for easy deployment that is independent of location
- Categorization and intelligent routing of email messages to the right personnel, regardless of location
- Autoresponses to ensure that customers know when to expect a response
- Suggested responses to help representatives respond quickly yet effectively
- A searchable, self-learning knowledge base that is easy to create, use, and maintain
- Workflow for outgoing email messages 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 contact center infrastructure and business systems based on open standards
- A comprehensive set of monitoring and reporting tools
- The ability to archive email messages for compliance purposes as well as to keep the main database updated
- A scalable architecture to handle email message volume growth
- Ability to handle multilingual 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 in comprehensive contact center management.

## Summary

In a multichannel contact center environment, email messaging is just one of the various channels your company can use to better serve your customers. Properly implemented and managed, email management can add to your contact center productivity, expand resource usage, and reduce costs, while increasing customer satisfaction and loyalty. Keeping these best practices in mind can help you make the best choices as you consider implementing email management for the first time or as you evaluate and modify your current solution. Providing fast, efficient, accurate, and consistent customer service, regardless of the channel your customer chooses (voice, chat, web collaboration, or email), demonstrates your commitment to customer satisfaction—email management done well simply extends that satisfaction.

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