



The Ultimate Guide to Customer Support Productivity

How to optimize your support for maximum customer delight



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Introduction

56% of people around the world have stopped doing business with a company because of a poor customer service experience.

Customer support is one of the most critical functions of any business. In a time where there is little differentiation between competitors in terms of product and price, the quality of customer experience has become a key driver of growth across industries. That's why Gartner predicts that by 2019, more than 50% of organizations will redirect their investments to customer experience innovations.

But improving customer experience doesn't mean one-off events that delight a small group of your customers. In order to truly build trust and loyalty with your customers, you need to offer consistent, reliable and efficient support. Customers no longer want to wait for a long time to speak to an agent over the phone or email. They hate being passed on from one agent to another, and having to repeat themselves with each new agent. They want quick action, and even faster resolution.

As a result of this, the use of automations, bots, and self-service in customer support has seen an upward trend. These solutions are designed to improve the productivity of support teams and enable them to deliver an amazing customer experience.

In this guide, you will find answers to the following questions:

- What are the different factors that influence productivity in customer support?
- What are the best practices you can follow to ensure maximum productivity from your support team?
- How can you use a helpdesk solution to prioritize issues, automate repetitive work, and improve processes?

Defining productivity

- Productivity is a measure of how effectively and optimally a company is using its resources. In customer support, it refers to the effort put in by support agents to resolve customer problems in a timely and efficient manner.

To ensure maximum productivity in your support team, you need to use the right combination of tools and maintain proper processes. Before we dive deep into the nuances of productivity in customer support, let's try to understand the different factors that influence it.

Here's an example of how two support teams function every day, and the hurdles they face to stay on top of customer requests.



Defining productivity

Team A

Agents have to manually look for support tickets in the queue

There's no way to prioritize the important issues

This manual process kills time and productivity

Customers end up getting affected as no strict policies/deadlines are followed

Team B

Every incoming ticket is assigned a priority based on a specific workflow

A service level agreement (SLA) is set up depending on the ticket priority

Tickets then get automatically routed to agents based on their availability and skill-set

Customers get timely responses and are not kept waiting

The key difference between how these two teams operate is the implementation of multiple steps by Team B to mindfully optimize their processes. It gives them the flexibility to address a variety of customer issues and escalations and helps their support agents resolve customer tickets in a faster and more streamlined manner. This guide dives into the different ways in which the features of a helpdesk improve the productivity of your support team, right from SLA policies to intelligent automations and self-service.

Set the right customer expectations with SLAs

- In customer support, service level agreements specify the time limit within which a support ticket has to be replied to and resolved. These limits are based upon the priority of the ticket, and help the business in setting the right customer expectations.

For example, your SLA rule can specify that urgent priority tickets have to be resolved within an hour. Low priority tickets, on the other hand, need not have such urgent timelines.



Types of SLAs

Response SLAs

Incoming messages from customers are assigned a response SLA that sets a deadline for an agent to reply to the customer. Response SLAs ensure that customers aren't left waiting around for a reply or an update. The time to first reply is an especially important SLA because it also serves as an acknowledgement of their inquiry. Once customers know that a human agent is looking into the problem, they are much happier waiting for a resolution.

Resolution SLAs

Each unique issue is also assigned a resolution SLA which sets a deadline for when the ticket needs to be closed or resolved. Resolution SLAs ensure that the customer is actually getting their issue resolved with quality responses and action, not just quick responses.

Issue-based SLAs

Some specific issues might require more urgent responses or resolutions. For example, a customer who has complained about a server outage will expect a much faster resolution than a customer who is requesting for a new feature. Issue-based SLAs assign specific deadlines for such outages and service issues.

Implementing a good SLA policy using a helpdesk

Prioritizing the issues

SLAs are all about striking the right balance between resolving tickets quickly and not overpromising customers. To set a good SLA policy, it's important to define a priority for the ticket. For instance, in the previous example of a ticket where a customer is complaining about a server outage versus one where he/she wants a new feature to be implemented, the first ticket can be prioritized as 'urgent' whereas the second ticket is a more low priority one. A support solution like Freshdesk automates the prioritization of tickets based on specified conditions, and makes it easier to set up SLAs.

Setting up escalation rules

It is also important to have escalation rules in place in case the support agent does not respond to the customer on time. Every time an SLA is violated, an escalation email must be sent to managers/supervisors, so they can bring the situation under control and ensure the ticket gets immediate action. Escalation rules, be it simple or complex, are extremely easy to set up with Freshdesk.

Understanding customer segments

When determining your SLA policy, it's important to consider if all customers fall into the same bucket, or if some customers require unique policies. Understanding the needs of your customers based on their plan type, or contract requirements can help you provide more personalized experiences. This process becomes simple with Freshdesk. It allows you to create multiple SLA policies, and enforce a different agreement for each ticket based on various conditions.

Automate repetitive tasks with workflow automations

- When it comes to customer support, there are a lot of repetitive tasks that need to be performed. For instance, every new ticket that comes in needs to be manually prioritized, categorized and assigned to the right agent. When these basic processes are automated, it frees your support team's time and lets them focus on the bigger, more complex problems.



Implementing automations in a helpdesk

Automations can be implemented for primarily 3 types of use cases in customer support. Let's examine them in detail and find out how businesses set up automation rules to ensure efficient workload management.

1. Automation rules for new tickets

2. Automation rules based on time

3. Automation rules based on ticket updates

Automations rules for new tickets

These rules run on every ticket as soon as it is created. They make sure that every incoming ticket is automatically categorized, prioritized, and assigned to the right agent or group based on factors that you define. The assignment can be done in a round-robin fashion or based on the skill-set of your support agents. Some examples where ticket creation automation rules can be used are:

- Setting the ticket priority to 'urgent' based on the customer who created the ticket
- Assigning tickets to different agents based on the content of the subject or description

- Deleting spam, auto-replies, and out-of-office emails before they appear on your ticket list
- Assigning tickets to different groups based on the ticket requester's timezone
- Sending an email notification to customers raising a specific kind of request

Automation rules based on time

These automations come into the picture for performing time-specific tasks on tickets. They check the state of your helpdesk periodically and trigger actions based on the time elapsed. Examples of time-triggered automations include:

- Automatically escalating tickets that are awaiting a response for a long time, say 12 hours
- Closing resolved tickets 2 days after the customer hasn't responded
- Notifying the manager when there are too many agent/customer interactions in a ticket which has been open for a long time

Automation rules based on ticket updates

As a support admin, you might want automation rules to trigger based on the occurrence of a specific set of events. For example, you might want to keep a close eye on the satisfaction ratings support agents receive, and notify managers in case of a bad customer rating. Event-triggered automations make it easy to monitor events like this and perform precautionary action. Some examples of event-triggered automations are:

- Sending a text message reminder to the agent when the customer replies
- Tagging a ticket as a 'return/refund issue' when the ownership changes from the support team to the finance team
- Reassigning the ticket to a different agent group based on the priority

The advantages of using automations

Use predefined answers and save agents' time

There are some common questions that crop up over and over in customer support. Support agents can use canned responses to shield these

questions, instead of repeatedly typing the same responses. Helpdesk software like Freshdesk will allow agents to create multiple reply templates, and insert them with a click of a button. This way, your agents can ensure customers aren't kept waiting and also focus on more heavy duty tasks.

Automate follow-ups with customers

Ensure that you don't overlook the little tasks - like following up with customers or closing the loop on tickets - that are vital to the smooth operation of your helpdesk. With Freshdesk's automations you can automatically send out customer updates, manage ticket statuses, proactively prevent customer frustration, and more.

React faster to critical events

Set up rules to alert the right people on your team, whenever there is urgent activity on your helpdesk that requires an immediate response. You can also automatically trigger a chain of actions as an initial response. For example, with tickets concerning refunds, you can tag the ticket as a "Return", assign the ticket to the 'Refunds' group and set the status as "Processing Refund". Such actions become really simple to achieve with 'Scenario automations' in Freshdesk.

Stay informed with notifications

Get notifications for important events right inside your helpdesk. Freshdesk lets you set up desktop notifications so that you stay informed even if you're working in another tab.

Filtering, categorizing and assigning tickets with Freshdesk's automations have helped the team avoid a cumbersome mailbox experience. With ticket statuses and priorities, agents can easily track conversations with customers and take tickets to complete resolution quicker. Agents now concentrate on getting the problem solved rather than trying to figure out a way to deal with lost tickets and angry customers.



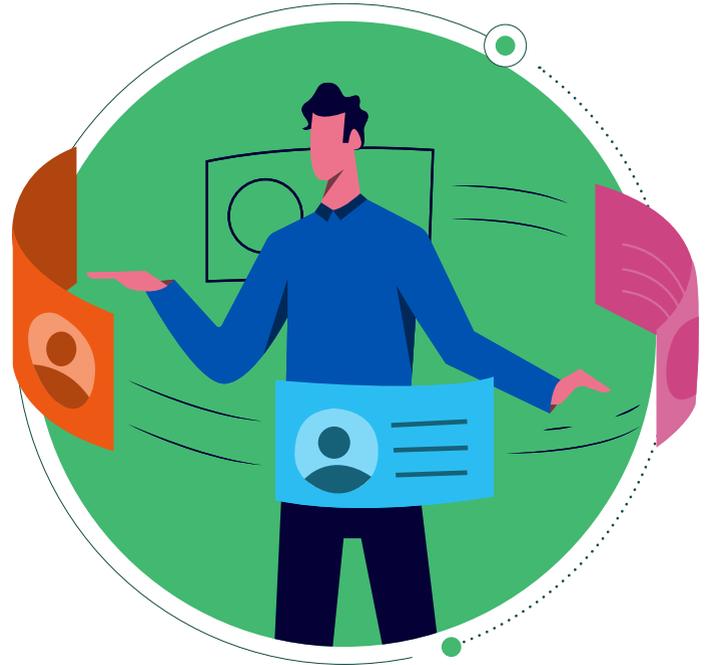
Anewspring,

an E-learning platform that uses Freshdesk for support

Manage workloads across channels and collaborate efficiently

Companies with the strongest omni-channel customer engagement strategies retain an average of 89% of their customers, as compared to 33% for companies with weak omni-channel strategies.

➤ [The Aberdeen Group](#)



As customer expectations have evolved over the years, more modern communication channels like live chat and social media are being preferred over conventional mediums like email and phone. Having customer data and support processes scattered across different tools will make it hard for your team to deliver stellar customer support. It is, therefore, extremely important to have an omnichannel support strategy in place, one that unifies customer messages across these diverse channels. A helpdesk solution like Freshdesk will help you achieve this, and also take care of how queries across channels are assigned to specific support agents.

One unified inbox for all your channels

With Freshdesk, customer queries from email, phone, chat and social media are converted into tickets and are stored in a single, unified inbox. This way, your agents don't have to switch between multiple tools to handle customer conversations effectively. When you reply to these tickets from Freshdesk, the customers will get the response on the channel they originally contacted you on. You can even access past interactions, ensuring there's no loss of context when your agents reply.

Intelligent, omnichannel ticket routing

When your company supports customers on multiple channels, it can get extremely tedious to manage workloads across each channel. With Freshdesk's Omniroute, an intelligent routing mechanism, it becomes easy to delegate work optimally to agents working on different channels. Admins can easily configure agent thresholds for emails, calls and chats under one-roof and auto-assign tickets based on existing ticket load. Tickets can also be routed on the basis of agent skills in Freshdesk. For example, Twitter or Facebook questions which require more informal replies than those via email can be automatically assigned to the social media experts in your team.

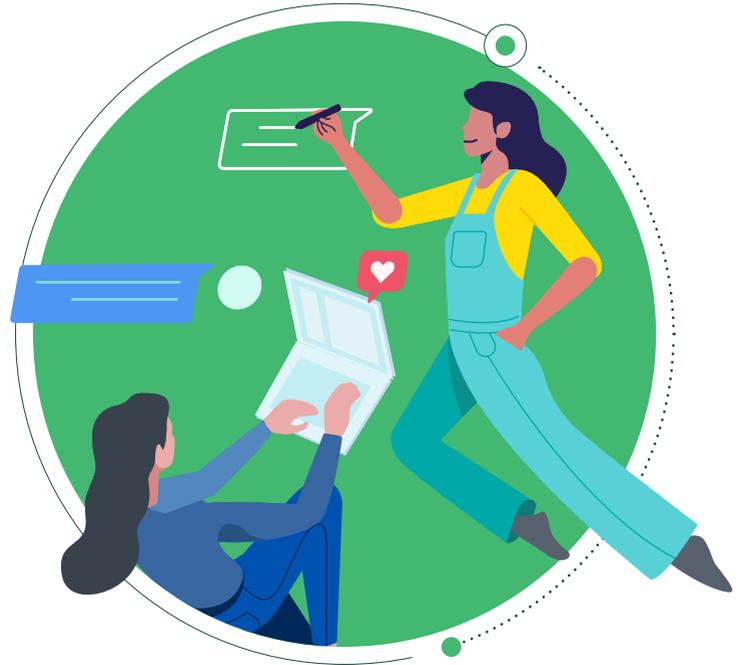
Collaborating with cross-functional teams

Customer support is a collaborative job. More often than not, support agents will run into queries that require inputs from multiple teams. For example, you will have to loop in somebody from your Engineering team if a customer has an in-depth technical requirement. With a tool like Freshdesk, collaboration between internal teams and external stakeholders becomes easy. You can share the ownership of issues, split customer tickets into smaller sub-tickets, and have team discussions right inside the ticket thread. This reduces the need to rely on multiple tools and thus impacts productivity positively.

Establish a happy team environment

73% of customers fall in love with a brand because of friendly customer service representatives.

> [RightNow](#)



From the way the team is structured, to how managers rotate employee shifts, every little aspect is essential to how your support team deals with the daily hurdles of their job. A good team environment depends on a combination of factors – including good management, rewards and recognition, and access to innovative technology that will help your team achieve success.

Create a work culture that thrives on positivity

Keep your team motivated by creating a positive and happy work environment. Encourage everyone in the team to speak up and make sure their voices are heard. Rotate employee shifts regularly to give each agent the choice to work in a timezone they prefer. Have regular one-on-one sessions with your team members and get feedback/ideas on how existing processes can be improved.

Recognize and reward hard work

Most support teams today have reward programs where the top performers get some kind of incentives to feel recognized. You can organize reward programs to give trophies and arrange additional cash benefits for employees who have surpassed their targets in a particular month/quarter.

Gamify your support

Gamification can take the monotony out of customer support, and make it more interesting and fun. When agents are competing to stay on top of the leaderboard, they get an incentive to up their game and deliver their absolute best. Helpdesks like Freshdesk, in fact, support gamification natively, so managers can implement a fun work environment right from their support system.

What worked for us at Freshworks

As the support team at Freshworks scaled upwards, we divided each regional team into multiple groups. Each group consists of:



A mentor
(4-6 years of experience)



1-2 agents
(1+ years of experience)



A buddy
(2+ years of experience)



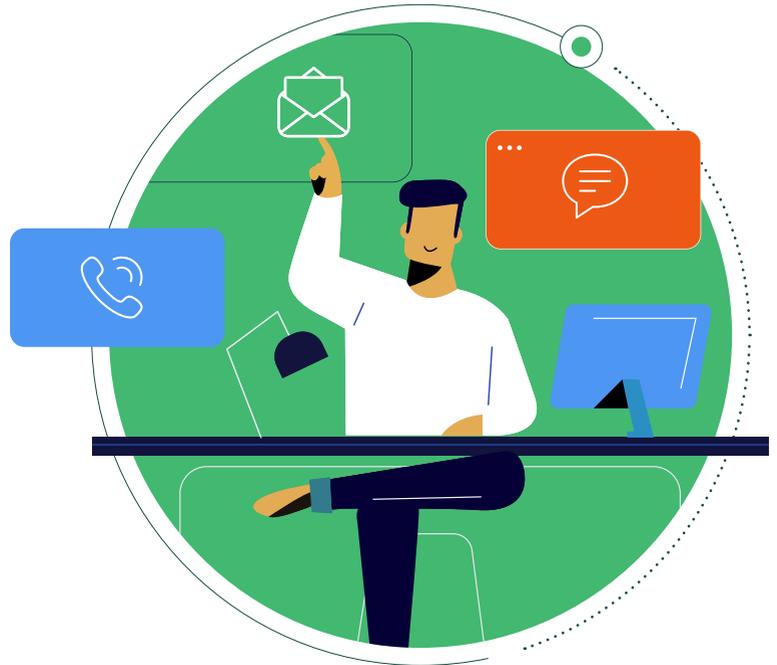
1-2 agents
(<1 year of experience)

This results in a balance between experienced veterans and newcomers with fresh perspectives – a blend that has proved to be very successful for us.

Offer the right self-service resources

67% of customers hang up the phone in frustration when they cannot reach a customer service representative.

➤ [Glance](#)



Customers today expect responses that are quick and accurate, and do not like to wait for hours or days to get their queries addressed. They will prefer reading a quick solution article or watching a DIY video, than wait in a queue to speak to a support agent over the phone. Self-service resources like knowledge base, self-help portals, and community forums have increasingly become more popular among consumers. They give them the power to troubleshoot problems by themselves in a quick and convenient manner.



think that self-service is the most convenient way to solve customer service issues



prefer self-service over talking to a customer service representative

*Source: Techonestop

Chatbots

Most businesses today use chatbots on their website to improve customer experience and also deflect potential support questions. Customers are greeted by the chatbot when they access the website, and are presented options on what they will need assistance with. Based on the customer's response, the chatbot fetches solution articles or does a handover to a human support agent.

Here are the ways in which chatbots help:

- Answer basic product questions, and save agents' time.
- Pass on the required context to a support agent, in the case of complex customer queries.
- Proactively assist customers at different stages of the user journey.
- Collect feedback on product issues and knowledge base enhancements.
- Make automated follow-ups and messages more interactive.
- Handle social media enquiries in a quick and efficient manner.

Knowledge base

Customers want instant answers for simple questions without having to wait for support agents. A knowledge base is the perfect tool that helps customers find their way on their own whenever they're stuck inside a product. It should provide step-by-step instructions to perform different product functions, and also serve as a repository to find answers to all the frequently asked questions.

Here are some knowledge base best practices:

- Categorize the knowledge base into folders and sub-folders, and establish a neat structure.
- Understand common user pain points, and ensure the basics are covered.
- Use simple language free from jargon to explain product use cases.
- Find the right balance between text and images/gifs to explain different scenarios.
- Optimize your articles for SEO, so that they are easily discoverable by search engines.
- Keep the knowledge base updated with the latest product screens and images.
- Listen to customer feedback and make continuous improvements.

Community forums

Community forums give your customers a platform to interact with each other. This way, they can resolve problems and find answers to prevalent issues amongst themselves. They can also use the community forums to pitch new ideas for product features, suggest improvements in the user experience, and more.

Some of the major advantages of community forums include:

- Announce product updates, beta releases, maintenance issues, and more on the forums.
- Let seasoned forum users help new customers understand the product better.
- Allow your support agents to be more productive, as customers will resolve common problems by engaging with each other.
- Prioritize the product feature rollout by keeping track of the top forum requests.
- Win loyal customers by offering gifts and discounts to the most active forum users.
- Get valuable customer feedback and use it to make meaningful improvements in the customer experience.

Choose the best productivity tools

- A good customer support software is essential to improve agent productivity. However, it's not the only requirement. For your support team to be at its productive best, you need to invest in the right combination of tools that will expand the capabilities of your helpdesk. From CRMs, to reporting tools, to team collaboration software, there are plenty of capable solutions that can all work together seamlessly.



Team collaboration tools

Slack

Collaborate efficiently between various Slack groups and stay updated on the status of Freshdesk tickets.

Microsoft Teams

Receive instant notifications from Freshdesk right inside Microsoft Teams. Know when a co-worker has added a note to the support ticket or when a customer has sent a reply.

Google Hangouts Chat

Stay notified of updates on your Freshdesk tickets right within Hangouts Chat. The Freshdesk bot will be a central place for you to quickly access and monitor tickets that you're working on.

TeamViewer

Enable your support agents to start remote screen-sharing sessions right from within Freshdesk tickets.

Freshconnect

Seamlessly collaborate with internal and external stakeholders by integrating Freshconnect with your Freshdesk account.

Reporting and analytics tools

Nicereply

Send precise and effective customer surveys and analyze the patterns in customer behaviour.

Klipfolio

Stay on top of your team's performance with customized dashboards that monitor every support metric and provide quick insights.

Geckoboard

Make better data-driven decisions by using the detailed dashboards available in Geckoboard. Project them on TVs and monitors to keep your team motivated.

CRM

Freshsales

Enable your support and sales teams to work in sync with each other. Support agents can easily access information - leads, contacts, deals, and accounts - from Freshsales for better context regarding customer problems.

Virtual telephony

Freshcaller

Maximize agent productivity by ensuring your support agents can take calls right within the helpdesk window. Integrating Freshcaller with Freshdesk also lets you have better contextual conversations, and set more precise routing rules.

Tools to use for the knowledge base

Freshdesk - as a knowledge base provider

Google docs - to collaborate with multiple stakeholders

Quicktime - to record screencasts

Sketch - to annotate screenshots and create graphics

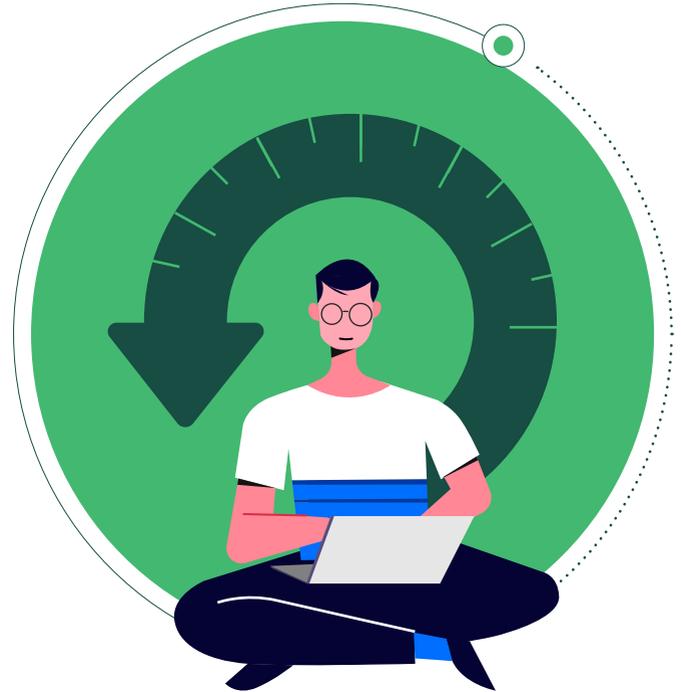
LICEcap - to create short GIFs

Grammarly - to spell check the articles

Track performance with metrics and KPIs

72% of companies believe they can use analytics and reports to improve the customer experience.

› [Deloitte](#)



Metrics play a crucial role in every aspect of a business. Only if you're able to measure performance, will you be able to set benchmarks and achieve targets. Without a doubt, metrics are of great importance in customer support too. Quantifying your customer service efforts will help you weed out the inefficiencies in your support processes and identify the opportunities where you can improve.

Key metrics to track

CSAT score

It refers to the percentage of customers who picked a positive response to the satisfaction survey questions. If the satisfaction score is low for your company as a whole or for specific agents, you should take steps to deliver a better support experience and win customer loyalty.

Measurement: The higher your CSAT, the better.

Average monthly tickets

The total number of support tickets received by your company month-on-month. It is a direct indicator of how intuitive your product is for hassle-free use by customers. If this number is on the rise, you should do a root cause analysis and make improvements to your product/service.

Measurement: The lower the number of tickets, the better.

First assign time

It refers to the average time taken for incoming tickets to be assigned to a support agent. This metric gives a good idea about the efficiency of the workflows you've set up in your helpdesk. A good helpdesk takes the manual effort out of the process with the use of automations that let you assign tickets to agents based on their availability, skills, and expertise.

Measurement: The sooner tickets get assigned, the better.

Average first response time

This metric measures how long it takes for you to respond to your customer once you receive a support request from them. In other words, how long does your customer have to wait before they receive an acknowledgement from you. You can further drill down into individual tickets that had a high first response time and identify where the lapses lie.

Measurement: The quicker you respond, the better.

First call resolution (FCR)

It gives the percentage of tickets that were resolved within the first agent response. It gives a measure of how well trained your agents are. You can also understand how well they use their existing knowledge and resources to craft the most concise replies to customers. Data shows that for every 1% increase in FCR, there is a 1% increase in CSAT.

Measurement: The higher the percentage, the better.

Average resolution time

This is the time taken by your support agents to fully resolve a customer query/ticket. The average resolution time tells you how strong your team's product knowledge is, how well you're staffed, and whether you are providing your team with the right tools to help them close tickets faster.

Measurement: The quicker you resolve tickets, the better.

Resolution SLA

Resolution SLA tells you what percentage of tickets your team has resolved within the promised SLA. This number is a reflection of your customer support team's efficiency. A lower resolution SLA percentage will mean more effort and training to improve the agents' product knowledge and time management skills.

Measurement: The higher the percentage, the better.

Conclusion

› **70%** of consumers say they have already made a choice to support a company that delivers great customer service

› [American Express](#)

There's no denying that the quality of customer service is pivotal to a company's success. And for your service to be of a good standard, you need to ensure that your team is productive and goal-oriented. Using the tools and processes discussed in this guide, you can get started on implementing a productive support setup. One that will keep both your support team and customers happy!



**Boost customer support productivity
with an omnichannel helpdesk**

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www.freshdesk.com/signup

