BUYER'S GUIDE

What to Look for in a **Customer Service Software Solution**

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Introduction

66% of consumers aged 25 to 44 believe that the customer is always right.

Now more than ever, companies are searching for new technology to deliver on customers' growing demands. And yes, they are growing. According to a recent Kustomer survey, 66% of consumers aged 25 to 44 believe that the customer is always right. That is 24% higher than those aged 65 and older. Simply put, the younger generation is expecting more from the brands they choose to engage with. They want seamless, personalized service on every platform, instantaneously.

The question becomes, how do you deliver? Without endless resources, providing exceptional customer service can be an intimidating challenge. Luckily, technology can help. This buyer's guide explains what you should be looking for in a customer service software solution, how to evaluate potential partners, and how to measure your success.
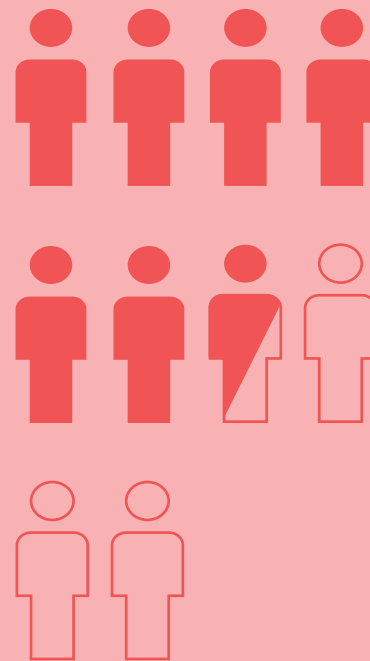
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A Modern Day Customer Service Solution

Think of it this way. Just fifteen years ago, the iPhone didn't exist. Twitter didn't exist. And customer service software wasn't built to accommodate the expectations and channels of today's customers. A modern day customer service solution treats customers like people, not tickets.

Many customer service solutions on the market today are ticket-based, meaning they identify the customer as an attribute of an inbound or outbound message and build the communication around that ticket. These systems prioritize the metric of a "done ticket" over a customer relationship.

In contrast, modern day customer service solutions focus on the customer as the center of each interaction. By tying existing applications, business processes, and performance to the experience of the customer, companies are able to deliver more human interactions, as they know the full context and history of that customer and how they've interacted with the brand in the past.

Focusing on the customer may also inspire changes in your business beyond the changes in your CX process. Building a customer-centric mindset increases the chance of evolving your business in response to customer feedback, not theories.

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What Makes a Modern Day System

Truly Omnichannel

Agents can seamlessly switch engagement channels in real time within the same conversation, easily toggling between channels.

Holistic Customer View

Every customer has a timeline unique to their history of purchases, omnichannel interactions, orders and returns - combining all internal and external data into one actionable view.

Understands Sentiment

Know how your customers actually feel and gain actionable insights across every support channel and interaction.

Powerful Automation

AI and machine learning enhances agent productivity and assesses the needs of your customers in real time to deliver the best outcome in the shortest time.

Customizable to Your Business

Fully actionable integrations with any existing system - internal or external. Let your customer service software match your business.

Moving from a ticket-based mentality to customer-centric relationship building brings many benefits, and will also take some work. Read through the following criteria to learn what to look for when evaluating potential customer service technology solutions.

WHAT TO LOOK FOR

Unified Data Environment

Siloed third-party data means an abundance of wasted time. Agents have to look in a multitude of different systems, on different platforms, just to service a single customer inquiry. Take this retail example:

A customer contacts you asking to return an item. You receive this inquiry and a ticket is created in one system. You might need to look up that customer's order history in another system using their email. Using a third system you might need to create a returns management authorization (RMA) order to return the item. And using a fourth system you might send a message to the person who handles those returns to ask to expedite the order for an important customer.

With unified data in one system, the process would be quick and easy. What if the customer's inbound message automatically brought up their order history, a single button click started an RMA process, created a shipping label and emailed it to the customer, and notified another team to expedite based on the customer's loyalty status? A single and full view of the customer, and an integrated data system, gives you the complete context of that customer's history so that you can take the right next action.

Your software solution should be able to use the apps you already have and to integrate those applications using industry-standard connectors and protocols. However, integrating applications is a complicated business and the existence of an integration doesn't guarantee that integration will work with your business. To really integrate, you need to have a system that can handle the inbound information, structure that data in a way that it can be displayed in your system, and make the data available for outbound or reporting use.

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Truly Omnichannel

The concept of omnichannel customer service has been watered down. It's more than simply communicating with customers on every channel. True omnichannel support ensures seamless transitions and consistent experiences from one channel to the next.

In a multichannel support environment, each channel lives in its own silo with its own dedicated team of agents, with limited communication or sharing of information between channels. Most of the time, when a customer contacts a company, the team manning that channel will create a ticket. If the customer then contacts the company through a different channel about the same issue, a second ticket will be created with each team working their respective tickets. This creates agent collision, inevitably frustrating and confusing customers.

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A best-in-class solution should create a unified home for all your customer data, regardless of the source.

As a result of this fragmented experience, customers will have to take the time to repeat to the second agent what they told the first agent. In addition, multichannel support leads companies to focus on resolving tickets, rather than building stronger customer relationships because agents lack a holistic view of each customer.

Omnichannel support, by comparison, shifts perspective from ticket resolution to customer relationship building. Customers have the freedom to move between channels throughout their engagement, and are guaranteed consistency, so each conversation starts where the last ended. Agent collision never occurs when communication channels are integrated, because agents can view the conversation and maintain context even as customers engage through multiple channels. If executed properly, omnichannel support provides a consistent experience for customers at every touchpoint after acquisition. But sharing data between channels takes a technological overhaul.

Look for customer service software that can integrate your combination of communication channels in order to capture the free flow of conversations across channels and display the data in a single screen. A best-in-class solution should create a unified home for all your customer data, regardless of the source, not only the data generated from customer conversations.

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Delivering Personalized, High-Value Conversations

Agents have a difficult role. They are the voice of your brand in every customer interaction, yet when they start that interaction they often barely have enough information to authenticate the customer, much less provide differentiated service to every customer.

Many companies are still relying on the old model of customer service, where they treat each new interaction as a separate event handled by different people across a variety of siloed platforms. In this model, there's no way to store, share and track the customer's history and past conversations, so customers are forced to repeat their issue to each new service agent. Repetition comes at a price: according to a recent Kustomer survey 86% of consumers get frustrated when they have to repeat information to customer service agents. Fortunately, the fix is simple: a platform that can collect,

organize and streamline customer data so it's all in one place.

To personalize a customer's experience, you have to know the customer—and that requires data. A platform that brings all the data about a customer into one place helps customer service agents understand the context of a customer's conversations and helps them deliver more efficient, proactive and relevant service. There's no need to waste the customer's or agent's time by asking for repeat information. Instead, that information is available at the click of a button, allowing the agent to personalize the customer's experience by giving fine-tuned advice, addressing problems proactively, and suggesting other products or services the customer might enjoy. The result? An efficient but personal interaction that builds a lifelong customer relationship.

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Secure

No company ever intends for a security incident to occur, but having the right tools with the right safeguards is imperative. Security is something that requires many layers of protection throughout the application environment. It starts with team policies and procedures and touches continuous security monitoring, tooling and automation built into the software development lifecycle.

Ensure that earning and maintaining trust is a priority for any software solution that you partner with. Robust logging, auditing, monitoring, and data encryption capabilities should be built into the platform, with industry best practices for security controls and processes throughout the application environment and software development lifecycle. This should include strict endpoint management, extensive employee security awareness training, and comprehensive vulnerability management with regular third-party penetration testing and code reviews.

Be sure to understand any security and compliance regulations that may affect your industry or geography, and ensure that any software partner that you work with is in compliance.

Compliance Cheat Sheet

PCI Compliance

The Payment Card Industry Data Security Standard is an information security standard for organizations that handle branded credit cards from the major card companies.

GDPR Compliance

The General Data Protection Regulation is a regulation in EU law on data protection and privacy for all individual citizens of the European Economic Area. It also addresses the transfer of personal data outside the EEA areas.

SOC2 Compliance

SOC 2 compliance makes sure that systems are set up so they assure security, availability, processing integrity, confidentiality, and privacy of customer data.

HIPAA Compliance

The Health Insurance Portability and Accountability Act created regulations to protect patient privacy in the healthcare industry.

Scalable

It would be great if you could have unlimited agents working 24 hours a day, seven days a week, 365 days a year to tackle every request that comes your way, but that's rarely possible. Fortunately, most modern customer service software solutions have automation to enable your staff to work more efficiently and focus on the customers who need the most help.

Look for a software solution that leverages AI and automation to improve the precision and speed of service by automating repetitive, manual tasks as well as your most complex business processes. Through branchable and multi-step workflows, platform actions and agent tasks can be automated. For instance, high-volume conversation traffic could be intelligently routed, loyal customers could be prioritized, and agents can quickly deliver standardized responses via dynamic content when appropriate.

With AI, businesses now have the opportunity to provide more self-service opportunities as well, freeing up an agent's time for more complex and proactive support. Chatbots are growing in popularity with both businesses and consumers. They can be used to collect initial information and direct customers to a help center if human intervention is not needed. While there is always fear of losing personalization when using AI and automation, with the right platform, businesses can actually do the opposite. For instance, if a business leverages customer data properly, chatbots could ask personalized questions based on an individual's purchase or browsing history. These interventions save time for both the customer and agent, and increase the time spent on the actual issue rather than information gathering and low-level support.

Beyond freeing up agent time, AI can also be used to arm support agents with all the information they need to quickly and accurately service their customers. AI support technology can suggest messages to send to customers based on historical conversations and customer attributes, which can become more accurate and personalized over time in conjunction with a machine-learning model.
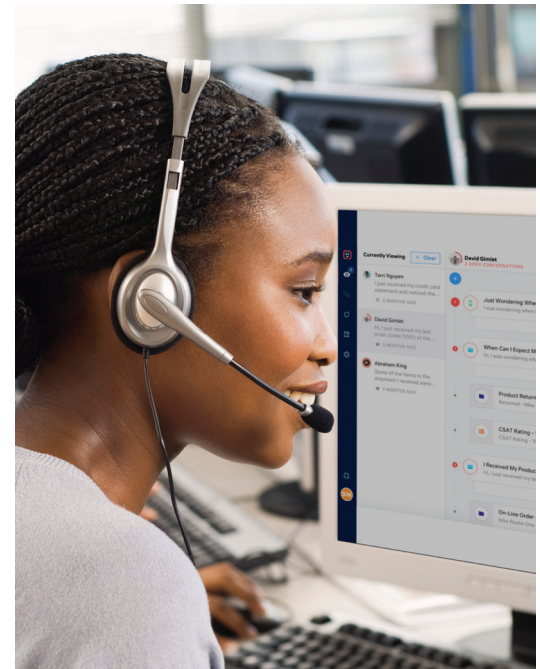
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Insightful

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Look for a software solution that provides robust customer reporting and gives you the tools you need to understand your organization more thoroughly.

Being able to measure the performance of your team, understand trends, and adjust your strategy accordingly is imperative for customer service success. Look for a software solution that provides robust customer reporting and gives you the tools you need to understand your organization more thoroughly.

At a high level, information about your organization such as traffic across all teams, a breakout of which channels are getting the most traffic, and how much time you're spending resolving customer issues, should be surfaced within your solution. However you may want more flexibility depending on how your organization measures success. Look for software that offers custom reporting, with the ability to visualize customer service data as you see fit to best demonstrate success to your stakeholders.

A truly flexible platform should also let you export the insights you receive within the software. Whether your organization requires real-time data streams directly to a data warehouse or business intelligence tool for reporting and analysis, or you simply need raw data in CSV format, your customer service software should be able to deliver.

Reporting can also help managers get ahead of issues and plan accordingly. By using predictive analytics, companies can forecast future conversation volume and staffing needs based off of historical data. That means agents will avoid fire drills and customers will have quick, convenient and thorough support in their times of need.

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How to Measure the Success of Your Solution

Unfortunately, measuring the success of a new solution is often an afterthought for many customer service organizations. But if this measurement isn't set up beforehand you may never know the full impact of the platform you choose, and whether it is enabling you to reach your goals.

First you should ensure that you have benchmarks in place. Identify the metrics that need improvement and document where you are today, establishing your baseline. While many of the challenges that customer service organizations face are somewhat intangible, try to attach a measurable metric to each challenge. For instance, if agent efficiency is a struggle for your organization, perhaps resolution time would be a good metric to track. Conversely, if effectiveness is a struggle for your team, measuring customer satisfaction metrics like CSAT may be more appropriate.

Next you should set a goal of how drastically you want these metrics to improve, and in what period of time, and socialize with all stakeholders involved. Not only does this give you a guiding light to work towards, but will allow you to optimize your solution according to those goals. Lastly, once that period of time arrives, be sure to re-measure your metrics and understand thoroughly what improvements have been made.

You should also ensure that there is a strong partnership between your team and your solution provider, so they can assist in not only measuring your success, but also surfacing insights you may not have been measuring yourself (and are hopefully making a positive impact!).

Steps to Measuring Success

- ✓ **Identify where you need to improve**

- ✓ **Establish your baseline**

- ✓ **Set a goal**

- ✓ **Socialize with all stakeholders**

- ✓ **Re-measure success metrics**

- ✓ **Establish a strong partnership with your solution provider**

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The Importance of Choosing the Right Technology

For better or worse, solving a customer's problem is no longer the only job of a customer service organization. Customer service is increasingly being thought of as a revenue driver and not a cost center, and customer service insights are being leveraged beyond the support organization to inform business decisions.

Lifelong customers mean a higher lifetime value. A recent Kustomer survey found that 74% of customers are willing to spend more money for good customer service. Conversely, customers will swear off retailers that they think deliver bad customer service, meaning support directly contributes to a retailers bottom line and should be treated with such importance.

All of this makes finding the perfect customer service software solution

imperative. Delivering on growing customer expectations, whether that means personalized and proactive support or true omnichannel experiences, is not optional. Find a solution that is able to deliver on all of the above criteria, and you should be set up for success and rapid business growth.

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About Kustomer

Kustomer is the customer service CRM platform helping contact centers and businesses reimagine service and support in today's customer-first world. Kustomer enables personalized, efficient and effortless customer and agent experiences by delivering unprecedented views of a customer's history, facilitating continuous omnichannel conversations and using intelligence to automate repetitive tasks and surface knowledge.

**To learn how Kustomer can help you provide exceptional customer service,
visit Kustomer.com/Demo**

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