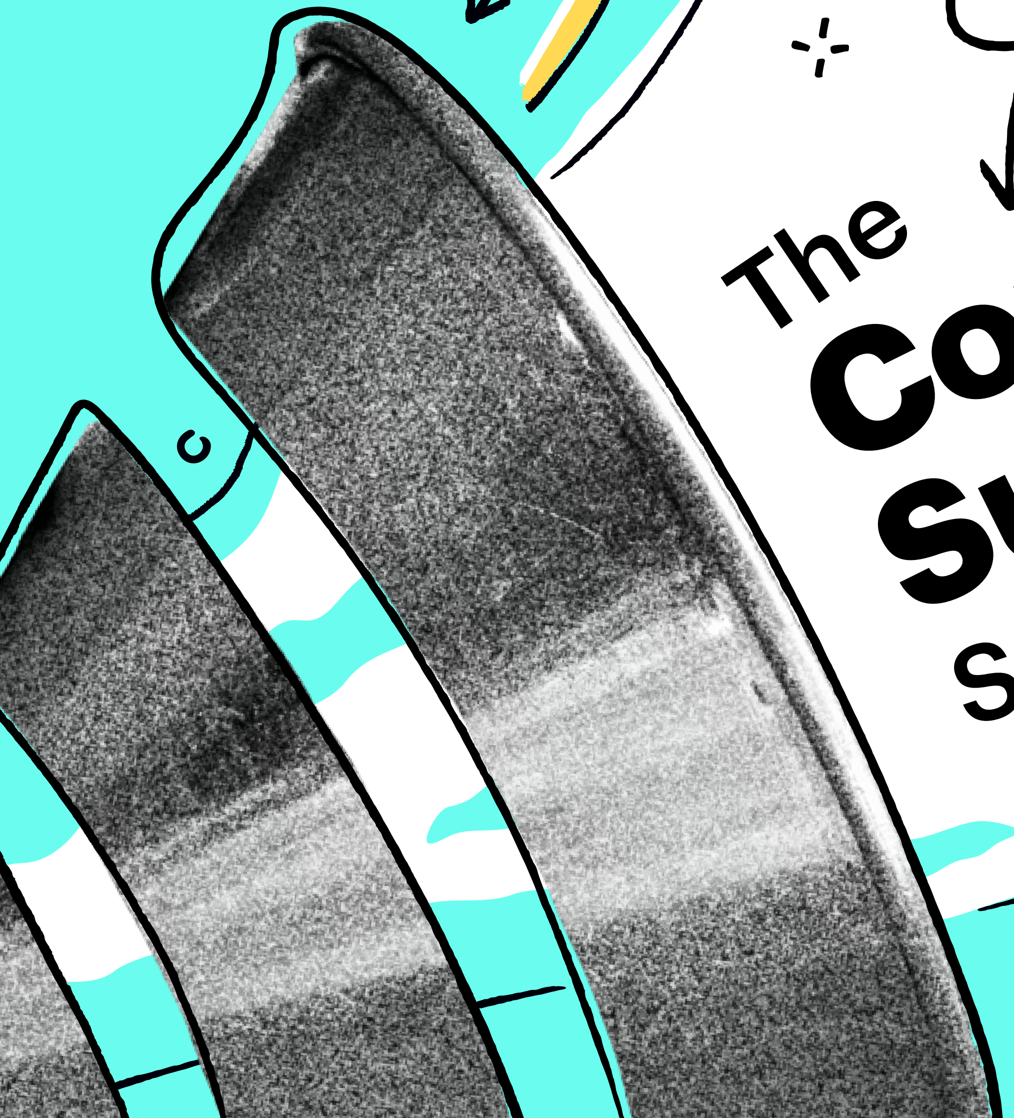
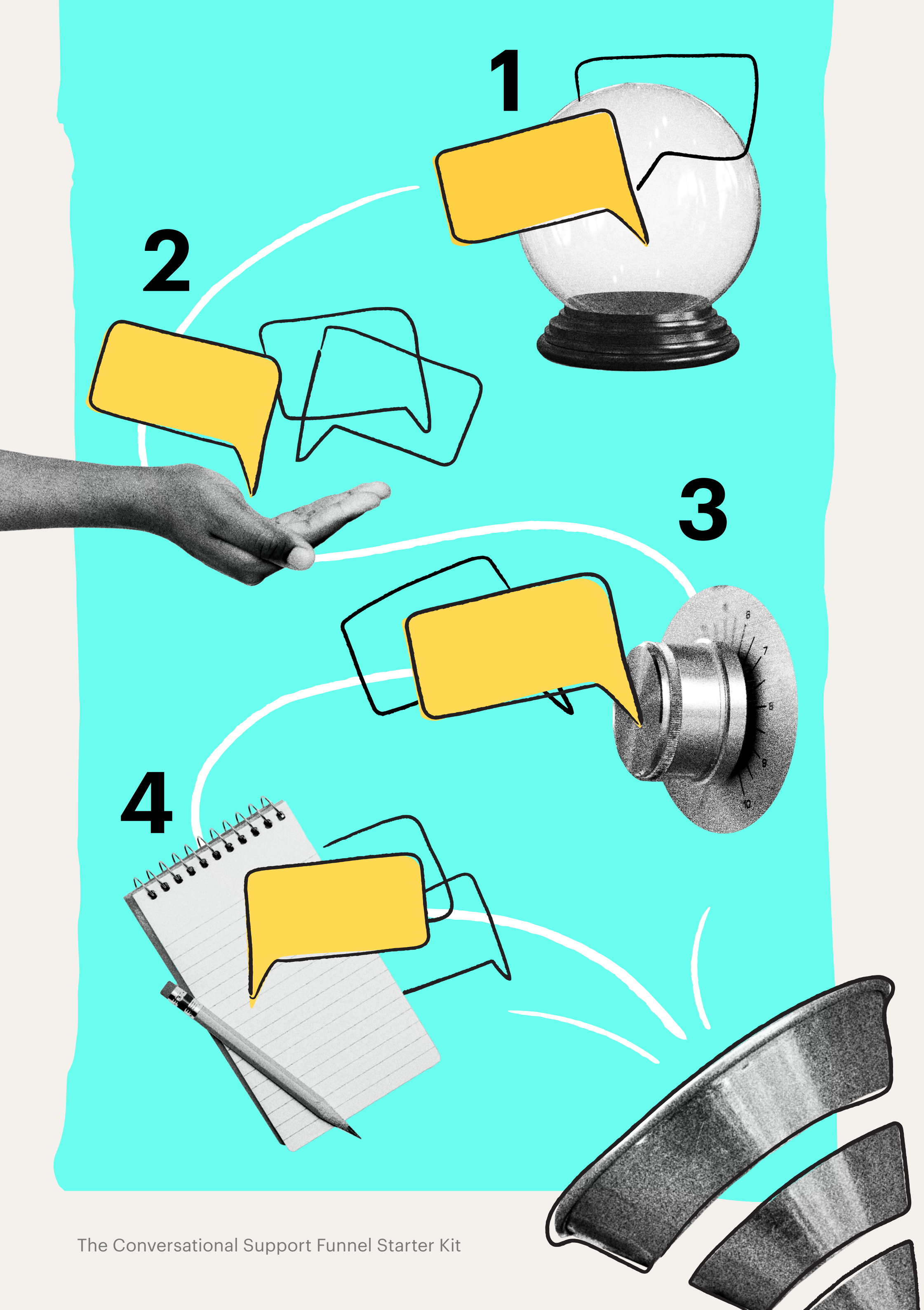
INTERCOM

The Conversational Support Funnel

Starter Kit





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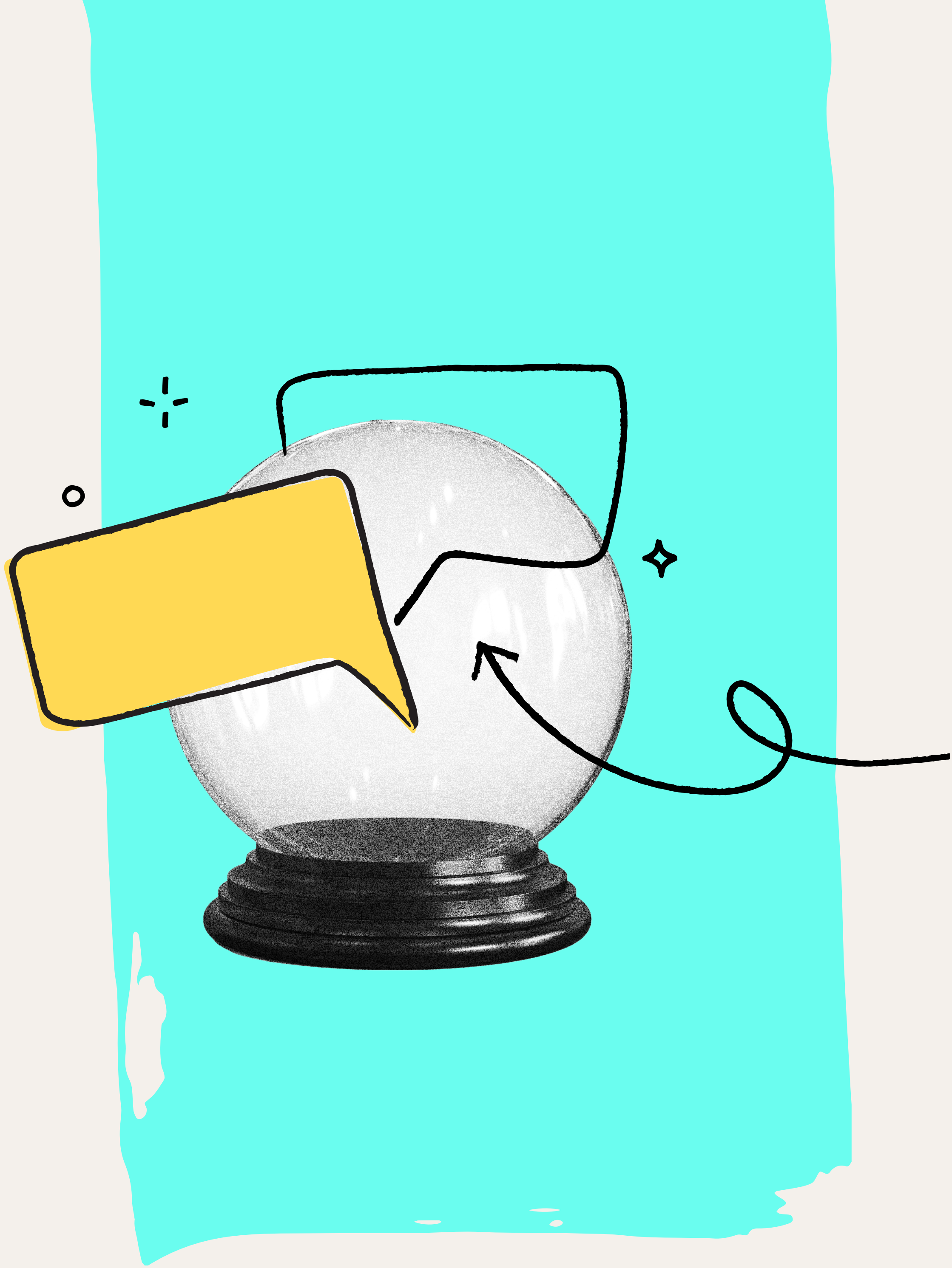
Part 1

The future of support is conversational



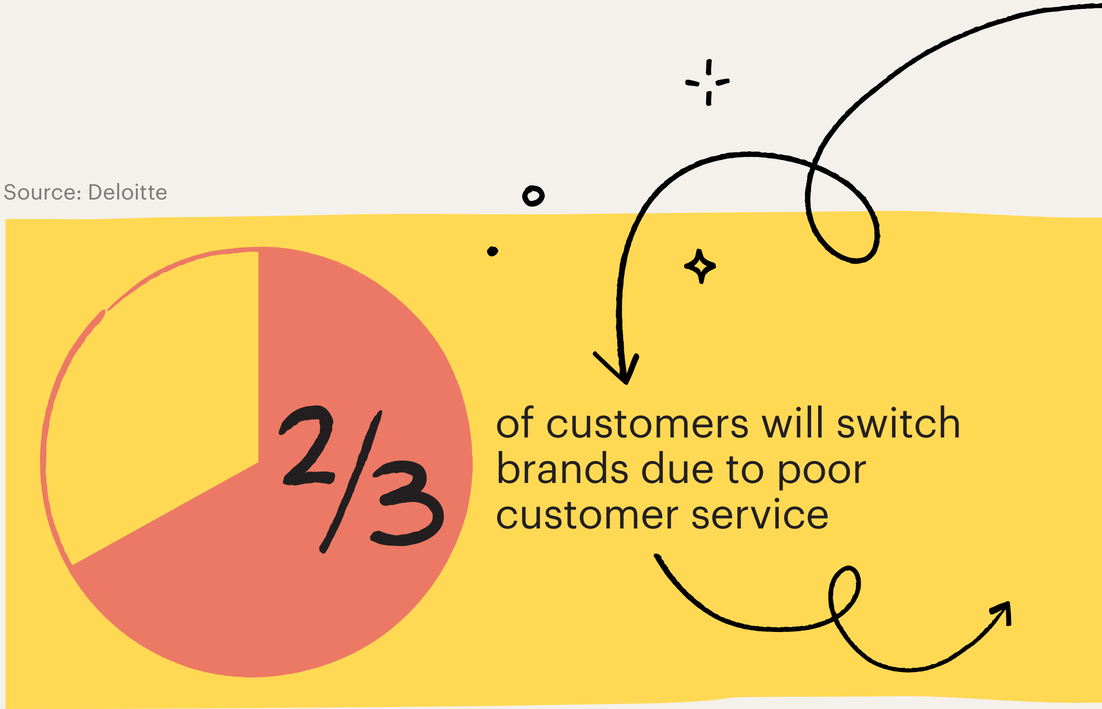
Today, customer support is undergoing an irreversible transformation.

Customers' expectations are on the rise – a recent study from Deloitte found that two-thirds of customers will switch brands due to poor customer service. At the same time support teams are grappling with an increased flood of conversations, which is fueling customer frustration and team burnout.

Something's got to give. Support teams need to find a way to meet and exceed customer expectations, while reducing the burden and workload on their team. We firmly believe that conversational support – where support teams provide a messenger-based support experience – is the next generation way to give customers the personalized, fast, convenient help they expect. Using a modern business messenger, like Intercom, you can have personalized and contextual conversations with customers in a way that feels far more lightweight and convenient than the channels of the past.

We've worked with thousands of support leaders who have embraced and successfully scaled their conversational support, which has led to increased efficiency, an improved customer experience, and better team morale. Now we've developed a blueprint to show you how to unlock the exact same benefits for your team.

Source: Deloitte

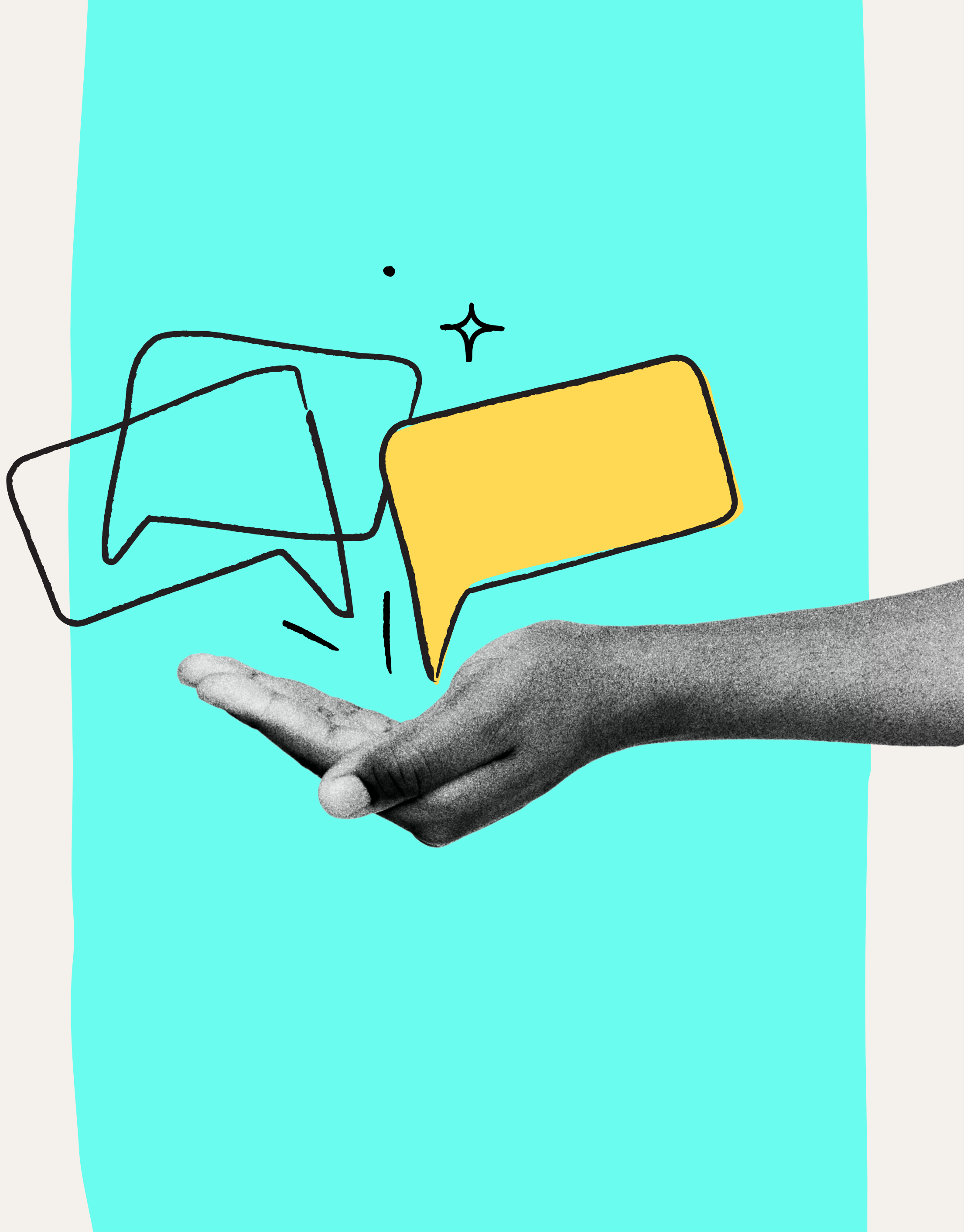


The Conversational Support Funnel is a framework that allows support teams to combine human, self-serve, and proactive support into a seamless messenger-based experience for customers. In this guide we'll show you how to apply the Conversational Support Funnel to your business, so you can proactively answer customer questions before they arise, empower customers to resolve questions on their own, and free your support team up to answer the most critical, complex queries.

All of this will result in better efficiency, more loyal customers, and a happier team. Enjoy!

Part 2

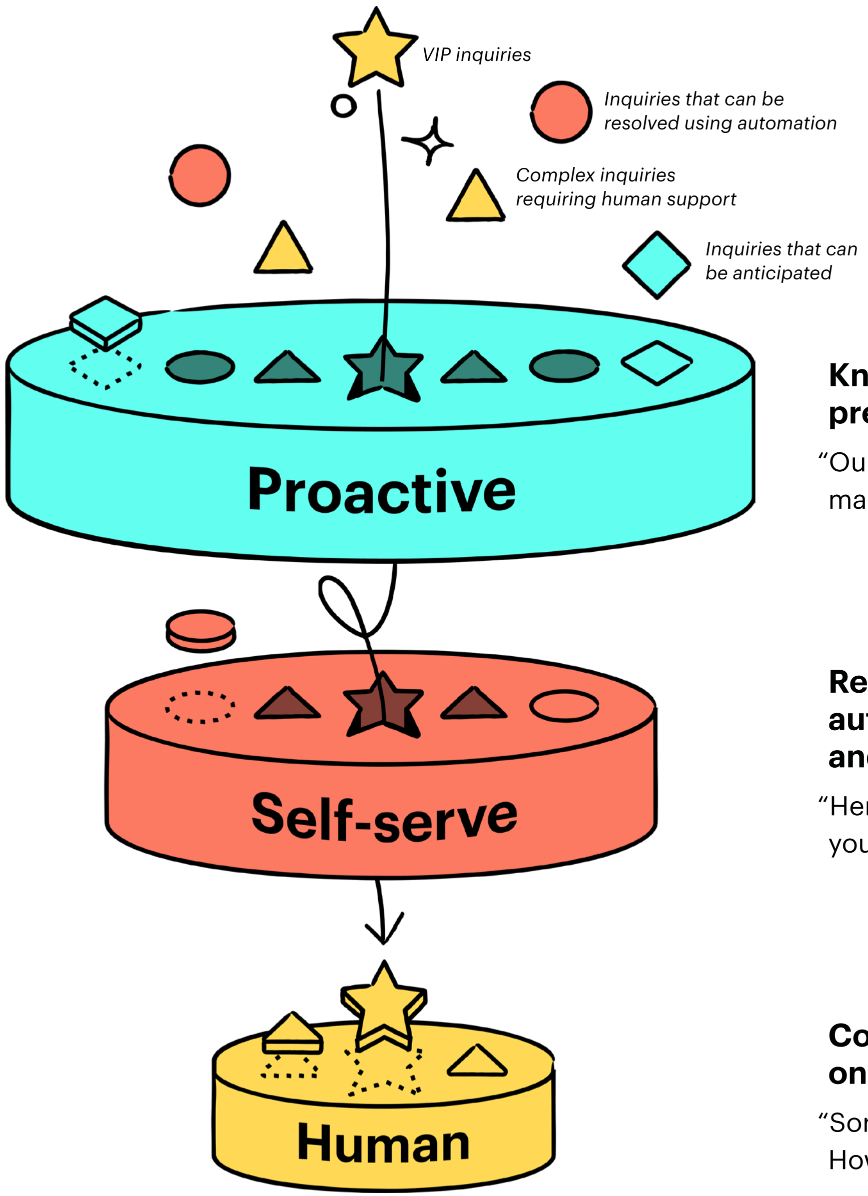
Scale personal support with the Conversational Support Funnel



Introducing the Conversational Support Funnel

The Conversational Support Funnel combines human, self-serve, and proactive support to empower your team to get ahead of known problems, automatically answer repetitive questions, and quickly resolve complex and VIP issues. It's the most effective, efficient way to provide personal support, at the scale your business needs as it grows.

As you can see most of your customers' questions are absorbed through self-serve and proactive support, liberating your support team to focus on the most important conversations that require a specialized, human touch.



Known questions that can be answered pre-emptively using targeted content.

"Our website will be down for planned maintenance this weekend."

Repetitive questions that can be automatically answered with chatbots and knowledge base articles.

"Here's how to reset the password on your account."

Complex and VIP questions that can only be answered by a human.

"Sorry to hear you're not happy with your plan. How can I help?"

Resolve complex and VIP queries with human support

Despite the advances in modern technology, many support teams still focus most of their valuable time and resources on human support. They're in the trenches answering as many questions as possible and closing tickets as fast as they can to meet their KPIs. Unfortunately, this reactive support approach requires playing constant catch up with an ever-increasing influx of queries. With customer expectations of great support at an all time high, this places even further pressure on your team.

Human support is an essential part of any successful support strategy, but the reality is that it doesn't scale and it's expensive to operate. Having your team answer mundane or repetitive questions isn't the best use of their time, resources, or talent.

When you optimize the Conversational Support Funnel for your team, self-serve and proactive support will automatically take care of the mundane and repetitive questions. That leaves your team with more hours and headspace to provide real value to customers and resolve critical queries – like messages from VIP customers, emotionally-charged complaints, and complex troubleshooting issues. After all, not even the best chatbot can help calm an angry customer, investigate a thorny issue, or build a rapport with high value customers quite like your team can.

The good news is that even with human support your team doesn't have to go it alone. With the right tools – like inbox automation, messenger apps, and reporting – you can make your human support more efficient, personal, and even more profitable. Here are our tips:

Expensify

"Through Intercom we can tell if the person is an admin for a large paying customer, a free user, a user who's about to convert, etc. Intercom knows everything about our users, which helps our team all get on the same page faster."

– Jason Mills, Director of Sales and Success at Expensify

Quickly get the customer details you need in the inbox

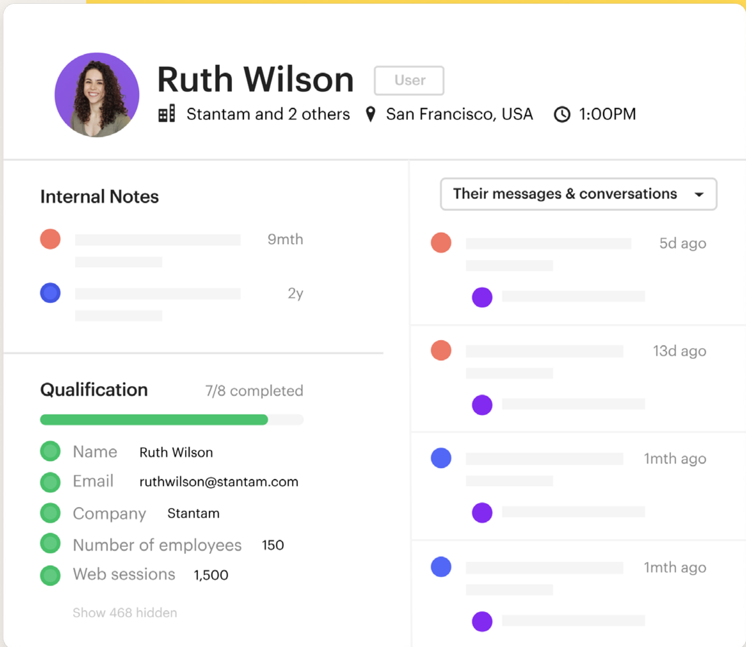
With modern support tools, you can use inbox automation to prioritize the most important issues and route them to the right support rep on your team, so customers get the specialized help they need the first time around. Once an issue is routed to a rep, they can step in to provide the customer with an empathetic, thoughtful response.

With Intercom, you can quickly view a customer's profile in the inbox to provide even faster, more personal support. The profile includes rich context about that customer, like what plan they're on, what company they work for, and whether they've been in touch before with a similar issue.

You can even track your customer's journey to see what actions they've taken in your product and what pages they've visited.

These personal details will help you better understand who the customer is and what their needs are, without asking lots of introductory questions, which as we all know can be maddening for the customer. Instead, you can get right to the heart of addressing and resolving the issue at hand.

Pro tip: *If you're using Intercom you can view both Intercom and third-party data, like data from Salesforce, Github, and Stripe, right from the inbox.*

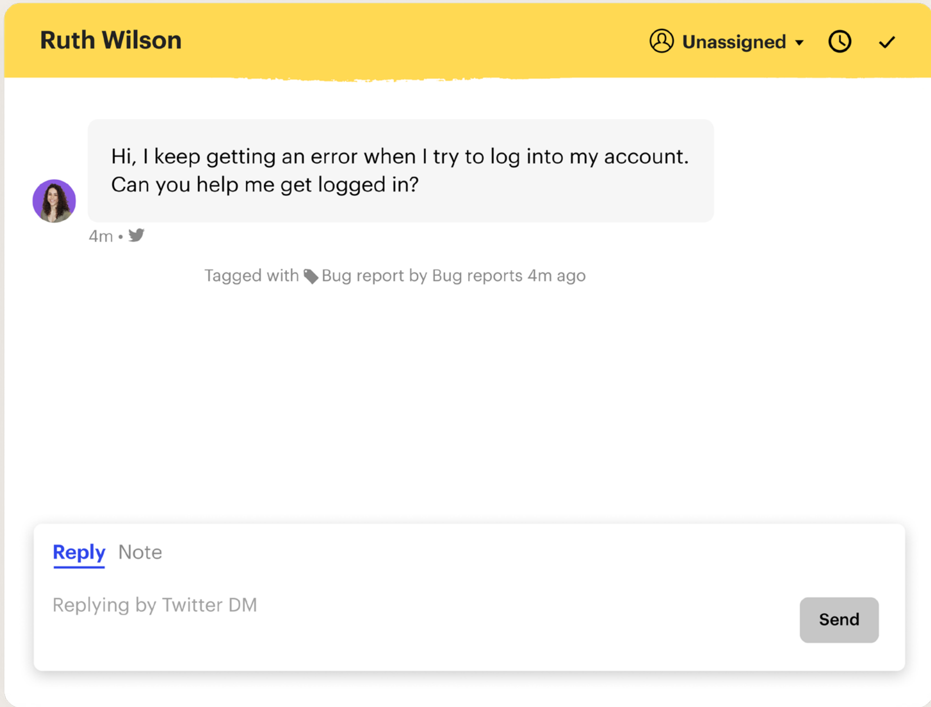


Provide faster help with apps in the inbox

Many support teams have multiple tools in their support tech stack, like social media, call center, and issue management tools. Switching between various support tools and channels can be a drain on your team's time and morale. It also means customers need to wait longer for help, which can lead to frustration. Not the best for your support team's reputation!

By choosing a platform that can plug into and play nicely with the other tools in your stack, you'll make your support more efficient, powerful, and ultimately more helpful for customers. With Intercom, there are lots of useful apps you can integrate with and use right from the inbox to streamline your support. For example:

- The Aircall app lets you start a quick call with a customer from the inbox. It provides a fast, easy, and delightful experience for your customers too as they can join the call directly from the Messenger.
- Twitter and Facebook apps automatically pull your direct social media messages into the inbox. Instead of your team spending large chunks of their day frequently checking social media channels, they can manage these conversations right from the inbox too.

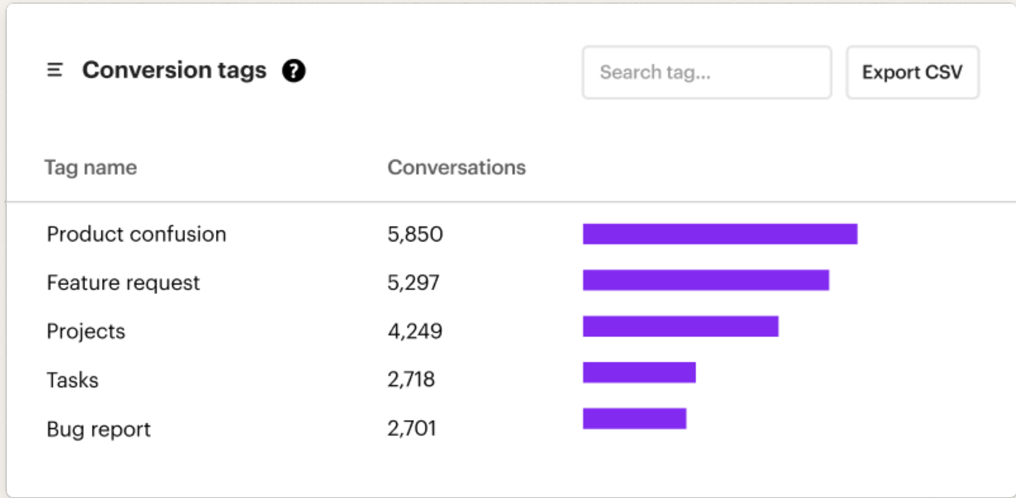


Measure and optimize the success of your funnel with reporting
Peter Drucker said it best, "If you can't measure it, you can't improve it." The same goes for your Conversational Support Funnel. Before you implement the funnel, you'll want to ensure you have the right tools and success metrics to quickly assess how it's impacting your team's productivity, customers' experience, and company's bottom line over time. At a minimum we recommend tracking:

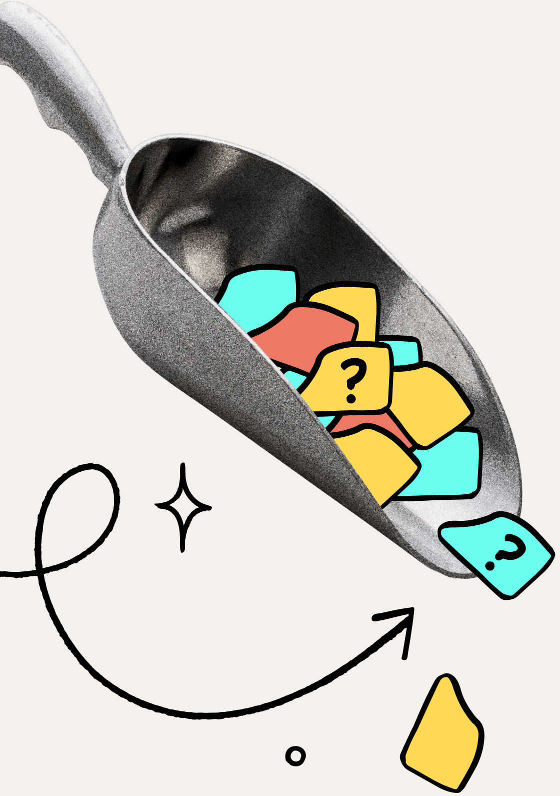
- Team efficiency metrics, like conversation volume, response times, and resolution rates.

- Customer experience metrics, like CSAT (customer satisfaction) score and customer retention.

We also highly recommend taking your reporting one step further and using it to discover how to optimize the funnel to work better for your team and customers. With Intercom, you can use tag reports to spot trends in the topics customers are writing in about most. Then, you can feed these conversational insights back into your proactive and self-serve support to provide your customers with faster, more personal answers, while freeing your team up with more time.



Pro tip: *With modern support tools, like Intercom, it's easy to identify what questions customers are searching for most or frequently writing in with, but can't find. Then, you can go ahead and create these knowledge base articles and bot answers using the exact words your customers typed.*



Empower customers to help themselves with self-serve support

Answering repetitive questions like "How do I update my password?" and "What's your cancellation policy?" can feel like Groundhog Day for your team. Not only is it time-consuming, it's also a heavy drain on your support team's resources and morale. So many support teams find themselves in this scenario, where they're listening to the same customer pain points and answering the same simple questions over and over again.

No one wins when your team is stuck answering simple, repetitive questions – not even your customers.

The more conversations that pile up in your support queue the longer all of your customers will have to wait for a response. That type of "good enough" customer experience is no longer good enough. Today's modern customers live in an on-demand world where their every need and whim can be met 24/7 – whether that's fast food, immediate news updates, or same day deliveries. When a customer has a simple query, they'll settle for nothing short of a fast, accurate, personal response.

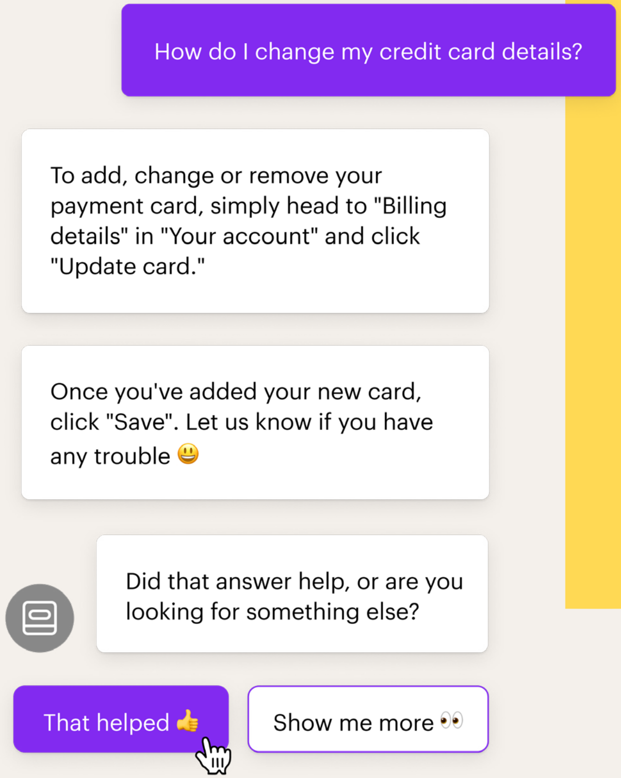
So, how do you satisfy your customers' need for speed and efficiently manage repetitive questions that take up so much of your team's time? One way to do this is with automated bots that almost instantly resolve your customers' repetitive queries. Our research shows that 50% of support leaders plan to invest more in automation, including chatbots, in the coming year to increase the efficiency of their support team. You can also empower customers to help themselves with contextual knowledge base content.

Self-serve support allows you to scale your support and provide customers with the fast answers they need, without upping your headcount or over-stretching your team. Here are some key ways to automatically support your customers:

Instantly resolve simple, frequent issues with chatbots

When a customer writes in with a simple question, like “How do I change my credit card details?”, they expect a close-to-instant response. You can use chatbots to automatically resolve simple, frequent questions – [our data](#) shows that chatbots speed up response times by an average of 3X, which significantly boosts customer satisfaction.

With Intercom, you can use [Resolution Bot](#) to speed up self-service even further by surfacing relevant answers based on what customers are typing – before they even hit the enter key.



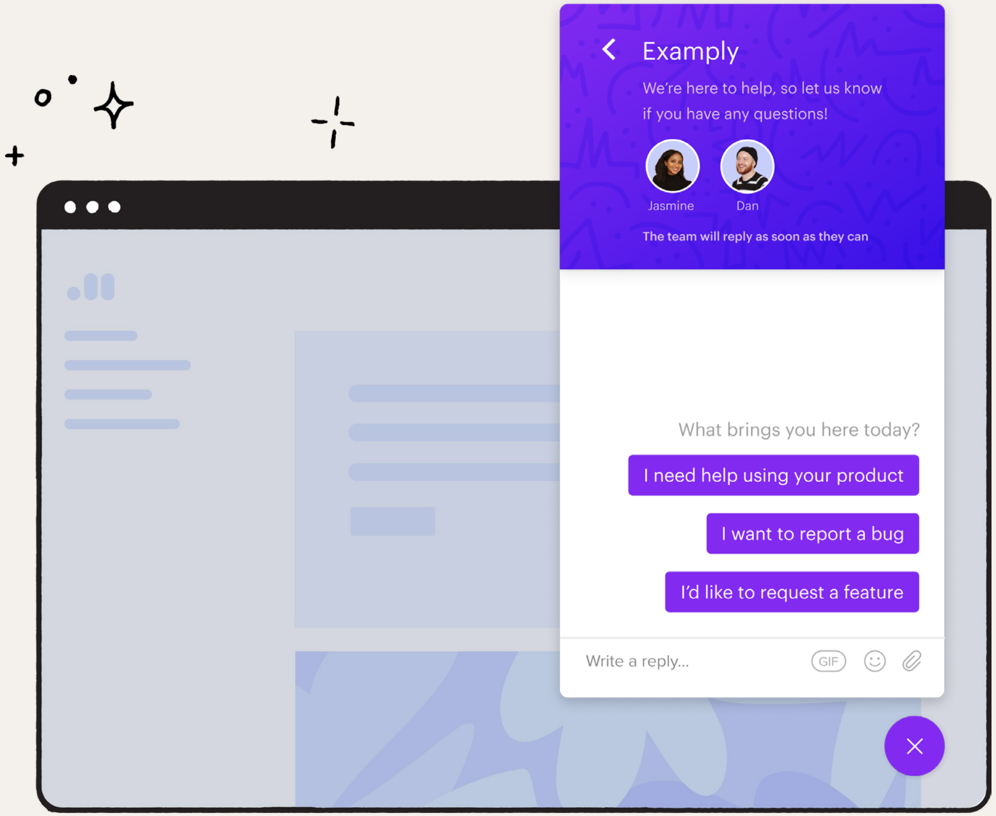
mongoDB

“Resolution Bot has been a tremendous help to our team. Not only has it helped us save 3,683 hours a month of customer time, but it also enables rapid response to unanticipated spikes in duplicative customer inquiries without requiring more personnel.”

– Gabriel Madureira, Senior Director of Growth Operations and Web at MongoDB

Chatbots are also the perfect way to gather information about your customers and triage them to the right support team or rep based on what they need. This means that when customers write in with important, complex queries they'll get the right person the first time around, rather than being put on hold or passed from rep to rep. It also speeds up response times as support reps will have the critical information they need to resolve queries faster.

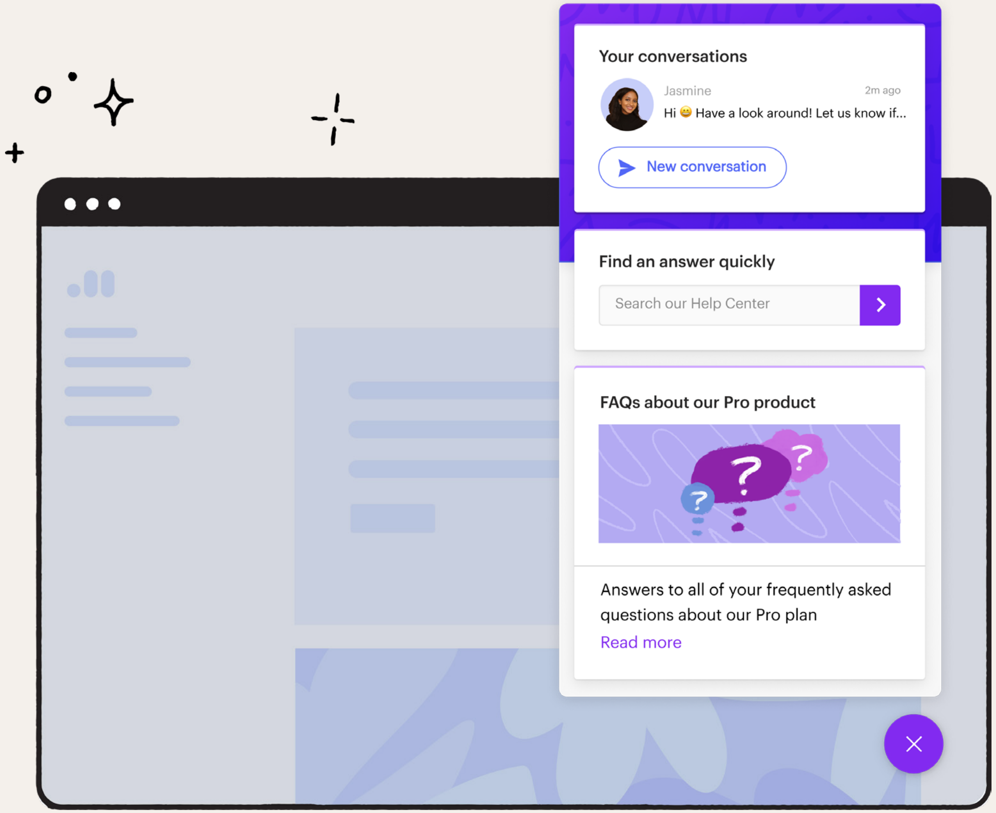
For example, our internal IT support team recently started using [Intercom's Custom Bots] to ensure the right types of questions were automatically routed to the right specialists, so they could resolve inbound queries faster. The result? The team's resolution time dropped by a whopping 50%, which translated to 39 minutes saved per issue. Think of what your team could do with that kind of extra time.



Let customers help themselves with contextual help articles

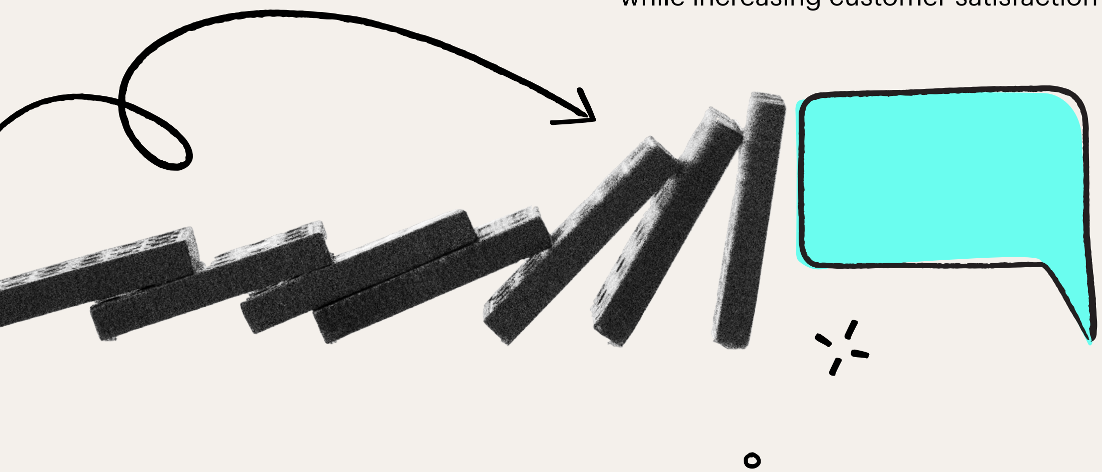
According to a recent Gartner study, 70% of customers use self-serve on the path to resolution. It's a simple fact that some customers would rather help themselves than talk to a support rep at all. A well-crafted, SEO-optimized knowledge base provides the perfect solution for customers who want to get the answers they need ASAP. Of course, this also has the added benefit of reducing your team's overall conversation volume.

With Intercom, you can take self-serve one step further and highlight important pieces of help content upfront in the Messenger, like FAQs, to help customers quickly find the answers they need. Imagine how grateful they'll be when they don't need to write into support and wait around for a response after all. For a truly personal touch, you can even surface tailored content to relevant groups of customers, like those who speak a specific language, who have amassed a certain level of knowledge in your product, or who are on a certain plan. It's the perfect way to provide customers with the exact answers they need at the precise moment they need them.



Stay ahead of known issues with proactive support

Proactive support is at the top of the Conversational Support Funnel for a reason – it's your first line of defense. Get it right and it can drastically reduce the number of conversations that reach your support team, all while increasing customer satisfaction and retention. So not only can you take pressure off your team but you can also demonstrate how support is impacting your business' bottom line.



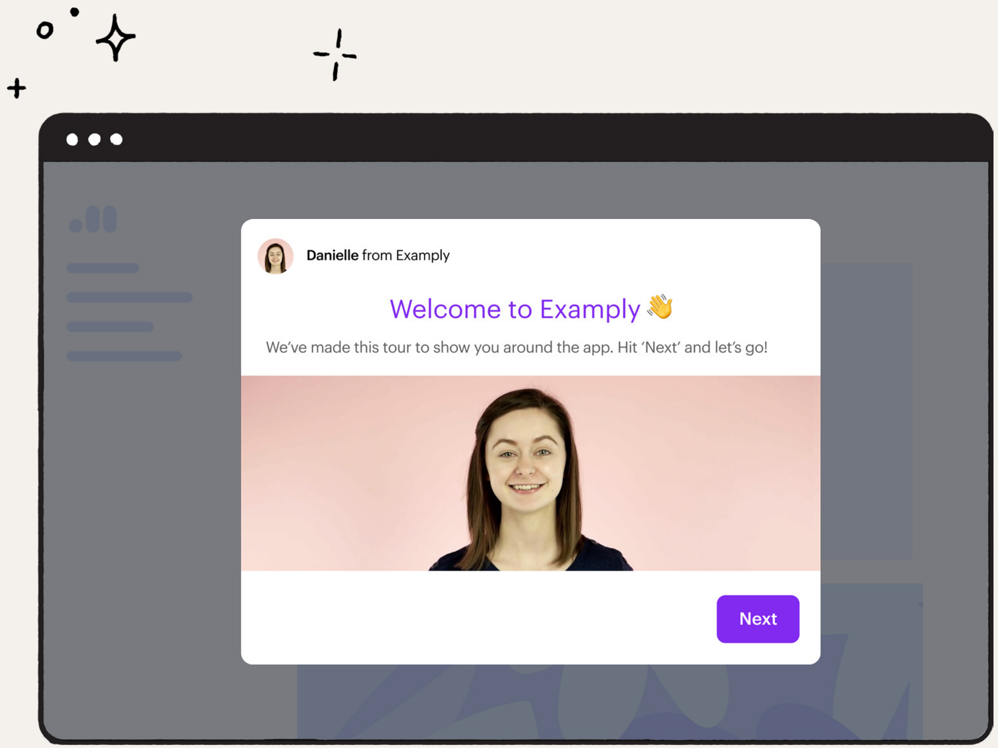
The typical reactive support approach is to let known issues roll in, which can result in frustrated customers and an unnecessary stream of queries. With proactive support, you can prevent these questions from arising in the first place by providing customers with the right help, at the right moment. For example, you can send outbound messages to specific groups of customers to alert them to known issues, like bugs in your product or delivery delays, and provide help upfront. You can also onboard and educate new customers, so they're set up for success with your product from day one and have all of the information they need to navigate known issues.

In many ways proactive support is the Holy Grail of customer support. So why do many of us simply accept this kind of customer interaction should be the sole domain of marketing or product teams? Our conversations with support leaders show there's a real appetite for that to change. In a recent survey we found that 78% of support leaders want to move from a reactive to a proactive approach with their support, but only 26% are sure they have the knowledge and tools to do so. Here are our tips for making proactive support a reality:

Onboard and educate customers

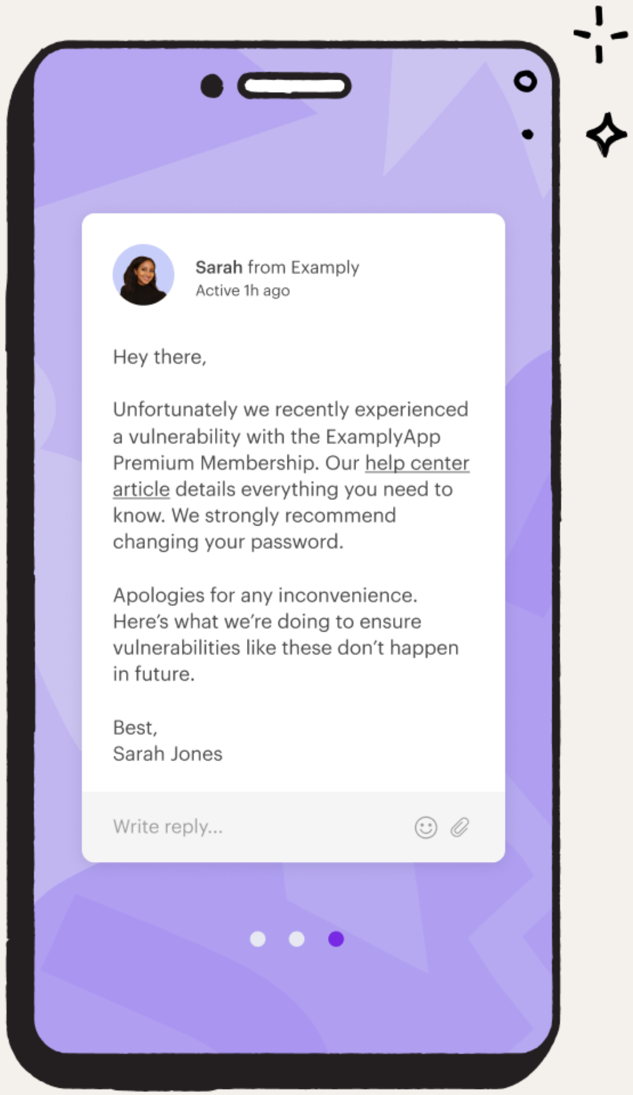
Acquiring new customers is always a reason to celebrate. But the reality is that while new customers are learning the ropes of how to use your product or service they can require quite a bit of handholding. Their questions are often directed at your busy support team, which can clog up your support queue. What if, instead, you could automatically onboard and educate your customers in the hundreds and thousands so they're empowered to help themselves right off the bat?

Giving customers proactive guidance from the outset not only increases customer satisfaction and retention, it also helps keep them out of the support inbox. It's a win-win! For example, you could set up a product tour or mobile carousel to automatically walk new customers through how to set up and configure your product, get value upfront, and navigate known pain points.



Alert customers to known problems
No matter how diligent your business is, day-to-day issues can occur with your product or service that can severely affect your customers. Think product outages, website downtime, bugs, delays with delivery – all those mission critical issues that can frustrate your customers and wipe out your team's entire day. Instead of waiting for a flood of issues to come rushing in for your team to address, you can proactively send an outbound message to flag the issue and provide help upfront.

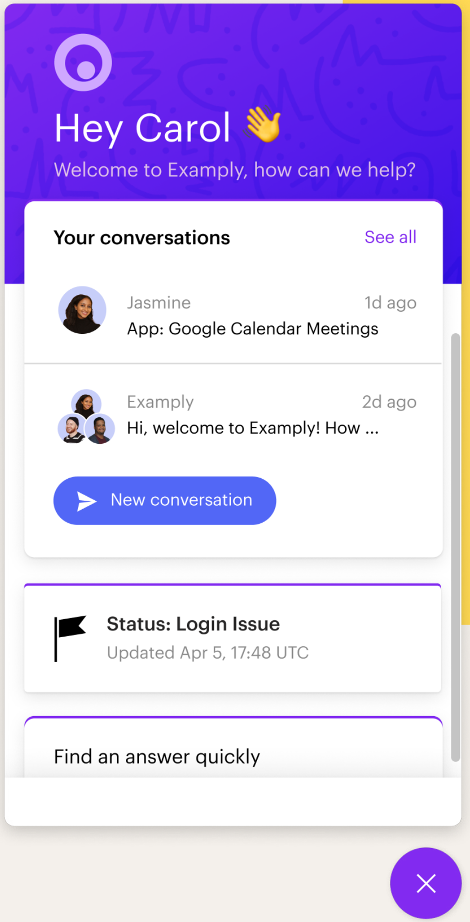
At Intercom, we recommend using mostly in-app messages for your proactive support, so you can reach customers in context while they're using your product or browsing your website. You can also send emails and/or mobile push messages for critical updates that simply cannot wait. Whatever message type you choose, don't message all of your customers at once. Instead, segment your customer base and send tailored messages based on who your customers are and the actions they've taken. For example, if you've recently experienced a vulnerability with your Premium product you could message your Premium customers who logged in less than 10 days.



Display key information in the messenger

Another way to flag important information is within the messenger itself. Then, when a customer opens the messenger they can see any critical updates that require their immediate attention, like if delivery times are delayed or if there's an issue with your product. If a customer finds the answers they need upfront they won't need to write in to your support team after all, saving both themselves and your support team valuable time.

Pro tip: *If you're using Intercom, you can use the [Featured Content app] to surface important updates or the [Statuspage app] to display your product's health status in the Messenger.*



"Using Intercom apps, we've been able to increase visibility around our uptime and scheduled maintenance for our customers. Providing this transparency reduces inbound conversation volume by allowing customers to view current issues we may be experiencing."

– Diana Ruth, VP of Customer Success and Support at Guru

Recap: When to choose human, self-serve, and proactive support

To sum up, human, self-serve, and proactive support excel at different tasks. Each part of the funnel helps your team achieve different goals.

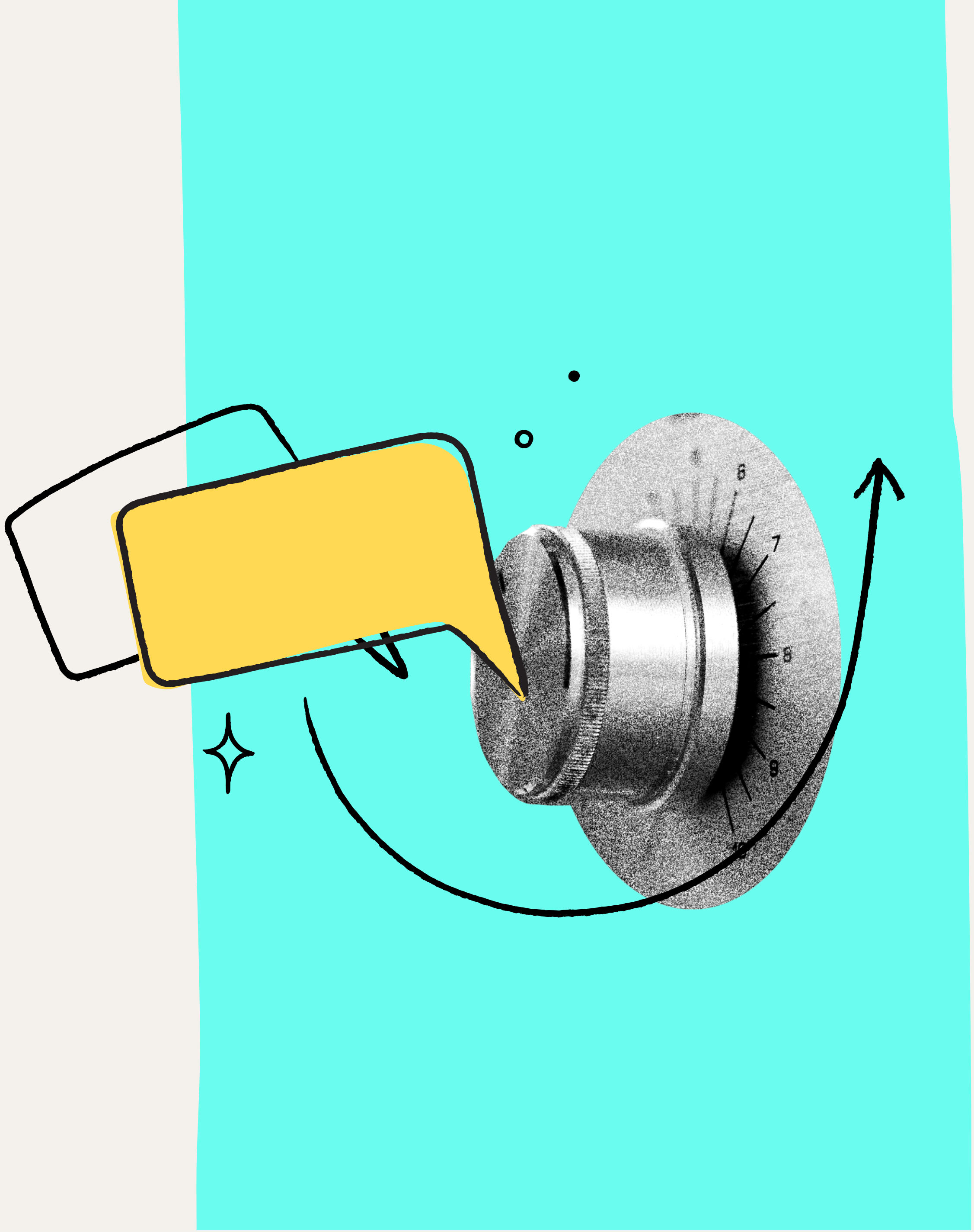
As you can see, all levels of the funnel lead to better team efficiency and customer relationships.

Where humans win	Where self-serve support wins	Where proactive support wins
• Managing complex questions • Solving technical problems • Managing high value accounts • Handling emotionally charged conversations	• Automatically resolving common questions • Reducing hold times • Quick routing to the right place • Reducing conversation volume	• Pre-emptively answering known questions • Educating customers on your product • Flagging critical issues and updates • Reducing conversation volume

Better team efficiency and customer relationships

Part 3

Six ways to optimize your funnel



1. No support team is an island: partner cross-functionally

Providing a great customer experience shouldn't lie solely in the hands of your support team. You don't have to implement every single element of the Conversational Support Funnel alone. In fact, the funnel works best when you partner with and get buy-in from key teams in your organization. For example:

- If your company has a support ops team make sure to partner with them, so they can set up and optimize your bots and automation for maximum efficiency. Our Support Ops team handles all of our automation at Intercom. Even as our business has scaled, they've managed to save a ton on support costs, while maintaining a high satisfaction rating with our customers.
- Send on known issues and bugs to your product team so they can proactively fix them.
- If another team, like marketing, owns outbound messaging, join forces with them to proactively reach customers and address known pain points before they have questions.
- Align with sales to establish hand-off points for sales conversations, so you can provide a seamless transition for your customers. With Intercom's Custom Bots you can also route sales conversations to your sales teams, so they bypass your support team altogether.

Pro tip: *Choose a platform (like Intercom 😉) that allows you to build conversational relationships across the entire customer lifecycle, spanning marketing, product, and support.*

2. Set meaningful metrics that move the needle

In some businesses there's still a perception that customer support is just a "cost center." Convincing the powers that be to invest in better, more efficient customer support is hard when you're fighting that misconception. Even though you know your support team influences customer loyalty and retention, it can be difficult to quantify.

The good news is that the Conversational Support Funnel helps you directly influence and prove bottom-line business results. We recommend getting together with key customer-facing teams in your company, like marketing, product, and sales, and setting collective bottom-line goals to work towards – think customer retention, customer renewals, and upsells.

monday.com

"We're seeing a big motion across all businesses on how an amazing customer service experience drives loyalty overall."

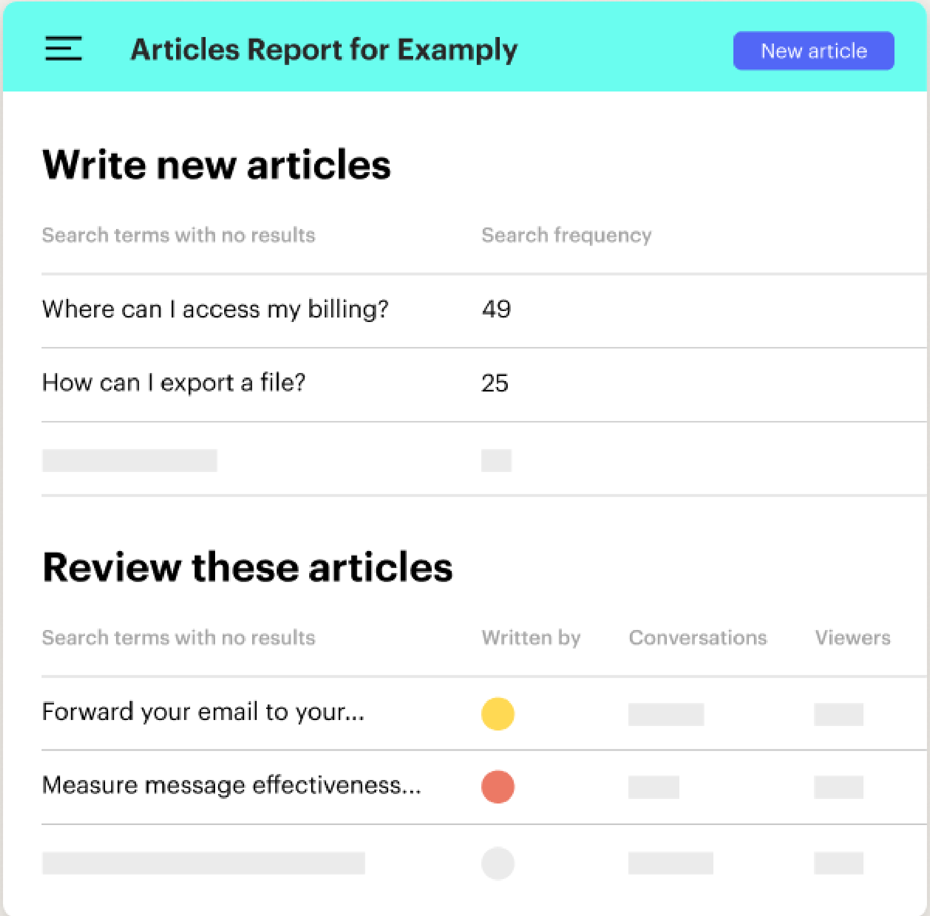
– Tom Ronen, Head of Customer Success at monday.com

3. Identify known customer pain points and FAQs

It's no secret that most support teams are incredibly busy managing day-to-day reactive conversations. You may be wondering how you'll have time to identify common customer questions and pain points, so you can begin solving them with self-serve and proactive support. Here are our tips for the quickest, most effective path to gaining valuable customer insights:

- Tag customer conversations to identify known customer pain points and feature requests. Then, pull this data into a spreadsheet to create a voice of customer report and share it with key teams you're working with. For example, you can use these insights to create your next proactive outbound message.

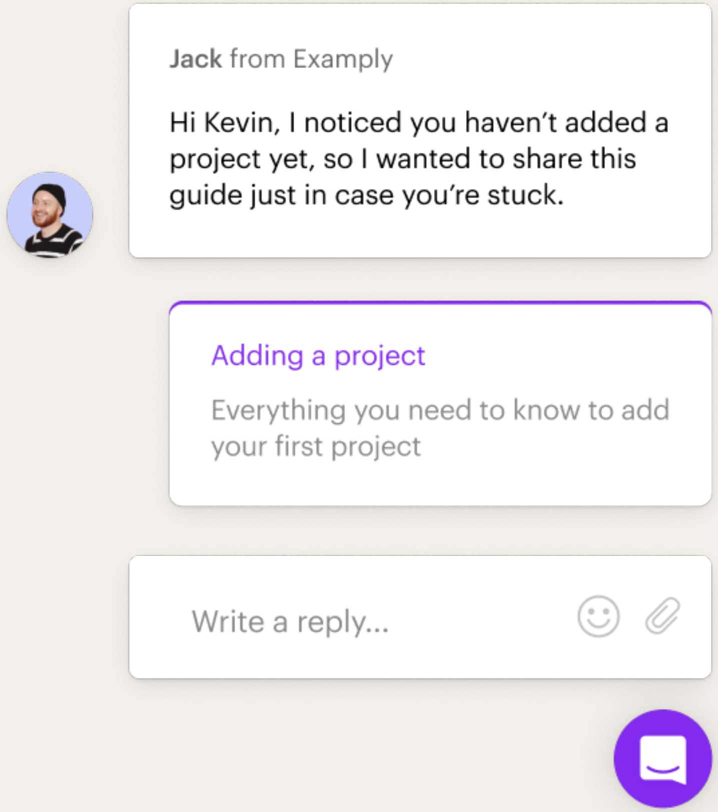
- If you're an Intercom customer you can use Articles and Resolution Bot insights to spot trends in what topics customers are searching for most, but can't find. This can help you identify the most helpful knowledge base articles and bot answers to write next.



4. Create relevant content to help customers at key moments

One of the best ways to increase your team's efficiency is to create relevant, engaging help content that addresses your customers' most pressing pain points and frequent questions. To answer as many of your customers' questions as possible, we recommend creating a variety of article types, including FAQs, getting started articles, and troubleshooting tips. Discoverability is also key for helping customers quickly find the answers they need, at the exact moment they need them. These tips will help:

- Optimize your articles to satisfy your customers' search intent so they can easily find an answer with a quick online search.
- Deliver help content in context. For example, you can add articles to your targeted outbound messages to expand on important instructions, or send an article through the inbox when a customer requires a longer answer.
- Create tailored content and deliver it to specific types of customers based on their needs, such as their language, plan type, or company size.



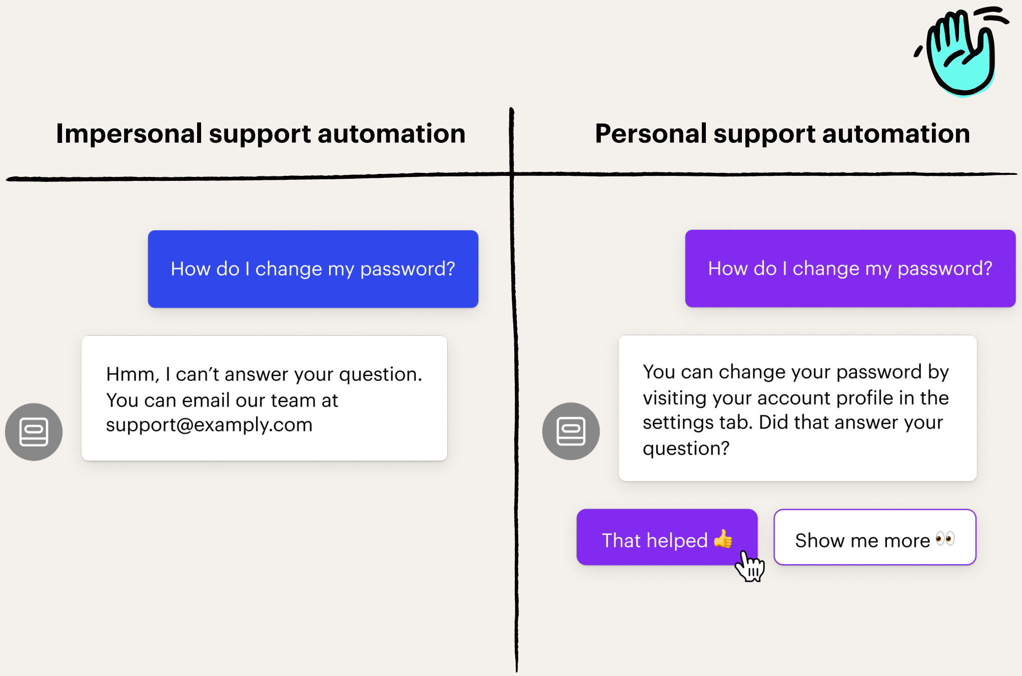
5. It's personal: embrace bots and automation

Despite the positive stats, there's still a fear among some support teams that bots and automation could make their support feel "impersonal." The reality is bots and automation can (and should be) deeply personal – you just need the right tools and approach. In the modern era of automation, the most personal thing you can do is respect your customers' time and get them an answer as quickly as possible, in context. Here are our tips:

- Provide proactive help in context. Always help customers based on who they are and what they need. For example, you can make your proactive outbound messages, product tours, and bots as targeted as possible using customer data like plan type, account spend, and company size.

- Use assignment rules to automatically route conversations to the right support team or rep based on personalized factors, such as message keywords, page URL, account spend, and more.

- Use a modern bot, like Resolution Bot, to resolve customers' questions immediately – sometimes before they even finish typing.



6. Set your team up for success

Optimizing your Conversational Support Funnel isn't just about efficiency gains and keeping your customers happy. Don't lose sight of your team's job satisfaction and morale too. None of this would be possible without them. To set your mordern support team up for success you'll need to give them the tools, training, and support they require to deliver exceptional customer service and stay satisfied in their roles. For example:

- Make sure you have the right tools to implement and optimize the funnel in your company. For maximum efficiency and cost savings, choose a platform that's easy to adopt and allows you to manage all elements of the funnel from one place. The good news is that you can achieve everything in this guide with Intercom.

- Ask your team what meaningful work they'd like to do with the extra time they'll have. Would they like to manage the proactive side of your support, for example?

- Consider dedicating specialized roles that allow your team to focus on critical business areas.

- Managing high value, complex queries requires a specialized touch. Make sure to provide your team with the training and support they need to resolve complex and commercial conversations.

Traditional customer support role	Modern customer support role
• Viewed as a cost center	• Viewed as a value driver
• Focused primarily on answering repetitive queries	• Focused primarily on resolving VIP and complex queries
• Lack of career growth opportunities	• Opportunity for career growth and specialization
• Solely focused on reactive support	• Opportunity to expand to proactive support and learn new skills
• Works as a silo	• Partners closely with product, marketing, and sales

Part 4

Worksheet: Manage every conversation with efficiency and empathy

Many support teams are worried that by adopting a messenger-based support approach they'll open the support floodgates. The Conversational Support Funnel allows you to scale your messenger-based approach and resolve each customer question with efficiency, empathy, and ease.

If you're experiencing a high volume of conversations you may be wondering how to begin addressing them within the funnel. We've created [this Coda worksheet]() to help you manage different conversation types quickly and personally. Here's a sneak peek at what the worksheet looks like:

QUESTION	FAQ?	COMPLEX?	PLACE IN FUNNEL	TACTIC	SUCCESS METRICS
How do I configure x product?	Yes	No	PROACTIVE 💪	• Product tour	• Customer retention
How do I use x feature?	Yes	No	PROACTIVE 💪	• Outbound message	• Customer activationCustomer retention
When's my delivery due?	Yes	No	PROACTIVE 💪	• Messenger app (e.g. Shopify)	• Conversation volume
How do I update my billing details?	Yes	No	SELF-SERVE 🤖	• Chatbot answer	• Resolution rate • Customer satisfaction
What's your cancellation policy?	Yes	No	SELF-SERVE 🤖	• Chatbot answer + knowledge base article	• Resolution rate • Customer satisfaction
How can I update my password?	Yes	No	SELF-SERVE 🤖	• Chatbot answer	• Resolution rate • Customer satisfaction
Why am I sending duplicate messages?	No	Yes	SELF-SERVE 🤖 + HUMAN 😃	• Chatbot routing + message from rep	• Response time • Customer satisfaction
Where's my delivery? It's late!	No	Yes	SELF-SERVE 🤖 + HUMAN 😃	• Chatbot routing + message from rep	• Response time • Customer satisfaction
Can you help me choose the right subscription?	No	Yes	SELF-SERVE 🤖 + HUMAN 😃	• Chatbot routing + message from rep	• Response time • Customer satisfaction

Worksheet tips

1. First make a copy of the worksheet. This is just an example of how you can manage your different types of customer questions. Use it as your North Star, but make sure to tweak it based on your customers' needs and the tools you have in your tech stack.
2. Appoint a dedicated tiger team to set up the worksheet and implement your Conversational Support Funnel. Ideally, this will be a group of people on your team who have a strong working knowledge of your customers' needs and an appetite for career growth.
3. Have your tiger team document your customers' most common questions and pain points. If in doubt, reviewing your latest voice

Make the most of the worksheet

We're aware that every type of business is unique and so are your customers' needs. You can tailor the worksheet to make it work best for your team in five simple steps:

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3. Have your tiger team document your customers' most common questions and pain points. If in doubt, reviewing your latest voice of customer report will help.

4. For every customer question, fill in the dedicated box in each column. You'll answer these questions:
   - Is it a frequent query?
   - Is it complex? Remember, complex queries are those that are emotionally charged, require strong problem-solving skills, and high priority conversations.
   - Where does it belong in the funnel? If in doubt, section 2 of this guide will help you figure this out.
   - What tactic should you use? Again, section 2 of this guide will help you choose the perfect tactic to address each question in the most efficient, personal way.
   - What are your success metrics?

5. Finally, once you've approved the worksheet, you're ready to implement your Conversational Support Funnel. Don't forget to report back on the success of the funnel to the powers that be. They'll be particularly interested in knowing how your support team is moving the needle on customer loyalty and retention, along with any efficiency gains.

Scale your conversational support with Intercom

At this stage you're probably excited to implement the Conversational Support Funnel in your company, so you can start providing customers with the modern, personal, convenient experience they expect and free your team up to take on even more meaningful work.

The great news is you can achieve everything in this guide with Intercom. Interested in trying Intercom to create the most efficient, personal support funnel in the business? Learn all about our Support solution and how to get started here.