

SUPPORT 101

THE FRESHDESK GUIDE FOR SCALING CUSTOMER SUPPORT



Scaling Customer Support

Providing good customer support is an absolute must for businesses today. Only if you're able to help customers navigate through bad experiences smoothly can you retain them and help build brand loyalty. As your business grows, you will need to scale and grow your support too, so that it can keep up with your increasing customer base and the ever-rising customer expectations. Among the aspects essential for scaling your support in an effective way, the most important ones include: hiring the right people, equipping them with the best quality training and investing in self-service to make it easier for customers to find answers quickly. In our detailed guide on Scaling Customer Support, we'll elaborate on these three aspects individually, and share pointers along with tips and tricks on how to get the best out of your support.

Hiring the right people for support

Customer-facing teams have the greatest power to influence customer thoughts and opinions about a brand as they interact with end users directly. There's an inherent skill set that every new customer service hire should possess in order to manage customer conversations effectively. For example, only if your support agent has basic email etiquette, will he/she be able to keep up with the huge volume of incoming queries without compromising on the quality of replies. No amount of training can compensate for these qualities, and it's important support managers are able to spot them right when they're hiring. In this section of the guide, we'll take a deep-dive into what makes a good support rep and how your business can make the right decisions while hiring.

Training your support agents

It's not just enough to possess the right skills, but using them to handle the everyday hurdles of customer support is also extremely important. Managers should hone the skills in support agents to ensure they represent the company in the best way possible. Right from sharpening their communication skills to teaching them empathy while handling difficult customers, good training can do wonders in helping support agents better their performance and create memorable experiences for customers. When you reach this portion of the guide, you'll find a list of skills that you can include in your training and onboarding programs to extract the best from your support team.

Building your knowledge base from scratch

Most customers today prefer to help themselves rather than spend excessive time explaining their problem to support agents over phone or email. As a business, you can build a comprehensive knowledge base covering every product feature and use-case in detail so that customers can quickly find the answers they're looking for. Building the perfect knowledge base from scratch can seem like quite the daunting challenge, but with our guide to self-service, we'll help you get up and running in no time. This part of the guide will explain the essentials required to create and structure your knowledge base.

ON HIRING

What to look for **while hiring your support agents**





“Hire character, train skill.”

Peter Schutz

Former CEO of Porsche

In customer service, there are a lot of skills that can be learned through training and experience, but there are some fundamental traits that people either have, or don't. It's important for you, as support managers, to recognize these traits and hire the right people. Here's what you should consider while hiring support agents.



SKILL 1

People Skills

How your agents should interact with customers

Support agents are required to be pleasant and empathetic while interacting with customers. Here's what you should look for in support agents to see if they're a people person:

- **A positive demeanor** for friendly customer interactions.
- **Great listening skills** to understand what the customer really needs.
- **Patience** to be able to guide customers irrespective of their skill level.
- **Empathy** to show customers genuine concern.
- **Great communication skills** to handle conversations effectively.

SKILL 2

Organizational Skills

How your agents should stay organized

Customer service issues are unpredictable and therefore, require an organized environment to avoid chaos. Here are the organizational qualities your support agent should possess:

- **Methodical strategy** to keep track of all things customer related.
- **Detail oriented approach** on issues and their resolutions.
- **Ability to distribute resources** to get things done faster.
- **Persistent focus** towards achieving customer satisfaction.



SKILL 3

Collaborative Skills

How your agents should stay organized

Support agents must work with multiple internal teams to resolve issues quickly. Here's a checklist of the collaborative qualities your agent should have:

- **Persuasion skills** to convince people about customer concerns.
- **Tenacity** to overcome resistance and get things moving quickly.
- **Willingness to learn** and improve skills and performance.
- **Ownership** to maintain focus on solving the problem.
- Ability to **acknowledge mistakes** and correct them.

SKILL 4

Subject Matter Expertise

The technical skills your agents require

When hiring for highly specialized roles in customer support, it's important to choose people who have a certain level of technical knowledge. Here is how you can check if a support agent will make a competent product expert:

- **Technical know-how** to solve complex issues.
- **Out of the box thinking** for better problem solving.
- **Adaptability** to quickly pick up new technologies.
- **Capability to apply insights** to future decisions.



SKILL 5

Workload Management

How your agents should manage workload

Customer support is one of the most chaotic departments within a company. Keeping the workload under control is important to ensure that problems are solved swiftly. Here are the skills that display efficient workload management:

- Ability to **adhere to strict deadlines** and handle pressure.
- Excellent **time management skills** to keep to a schedule.
- **Self-awareness** to maintain performance and productivity.
- **Setting realistic expectations** by being upfront.
- **Multitasking skills** to switch between urgent and less critical activities.

ON TRAINING

Lessons to Become a **Pro** at **Customer Support**





*“Until you understand your customers
— deeply and
genuinely — you cannot truly serve them.”*

Rasheed Ogunlaru

Author of Soul Trader



LESSON 1

Communication

Email communication - Basics

Writing a good support email depends on getting the basic email etiquette right. Here are six simple checks to write a good support email:

- Address the customer by name.
- Thank the customer.
- Answer ALL their questions.
- Address the underlying emotion of the email.
- Try out the solution before suggesting.
- Check your grammar, links, code and attachments.

Watch related video



5 ingredients of exceptional support emails -
<https://www.youtube.com/watch?v=b7xlr3TYDWc>

Email communication - Pro

When your email basics are in place, the next step is to wow your customers with your emails. Here are the ingredients of an exceptional support email:

- Format the email and make it easy to read and understand.
- Predict and answer follow up questions the customer might have.
- Lose the jargons in your communications.
- Bring a touch of personality in your interactions.
- Be truthful no matter what.

Watch related video



Writing emails in customer support -
<https://www.youtube.com/watch?v=St2lALoi5Qk>



An okay email vs an exceptional email

Okay response

Hey Will,

We have a 30-day return policy for air purifiers. You can see the finer details of the policy in this attached document.

<**Attachment**>

Thanks,
Lucy

Exceptional response

Hey Will,

We have a 30-day return policy for air purifiers. You can find more details about the policy in this document

<Attached:Return_policy.pdf>

If you are worried about the quality of the air purifier you want to purchase, here are some options that are highly rated and have the lowest number of return requests.



<Link to purifier model 1>

<Link to purifier model 2>

<Link to purifier model 3>

If you need more options, feel free to ask me.

Thanks,

Lucy

Social media communication

Social media communication is slightly trickier than email since you'll be representing your brand publicly. Here are some tips to ace your social media support strategy:

- Respond quickly, and set the right expectations.
- Give a personal touch to your replies.
- Turn negative feedback around in your favour.
- Segment the support and marketing handles.
- Anticipate issues and reach out proactively.

Watch related video



6 tips for social media customer support -
<https://www.youtube.com/watch?v=ArToCzsJVyo>



Bad social media reply



Hey @brand_name, I'm having trouble with your product. Please look into it immediately.

Asking the user to switch channels



Please call us at <Phone Number> so we can learn more about your problem and answer any questions

Good social media reply



Hey @brand_name, I'm having trouble with your product. Please look into it immediately.

Stick to the same channel and establish urgency.



DM us the details about what's wrong with your <Product Name>. We'll see how we can get it up and running again immediately.



Empathy

Being empathetic to customers

Expressing empathy to customers helps them understand that you are doing your best to solve their problem. Here's how you can express empathy while talking to customers:

- Listen actively.
- Make customers a part of your solution.
- Be curious about your customers.
- Respond to the customer's tone.
- Do not assume, ask.
- Take their side when they are right.
- Avoid sympathy.

Watch related video



7 ways to show empathy to customers -

<https://www.youtube.com/watch?v=o2uRPIO26vM>

Empathy statements to use in customer conversations

Scenario: You receive negative but useful feedback from customers.

- “Thank you for being upfront and honest with me.”
- “I want to thank you for taking the time to speak with me today.”
- “I apologize for the tough spot we put you in.”
- “Thank you very much for alerting us about this issue.”
- “I appreciate you bringing this to our attention so we can deal with this immediately.”



Scenario: Troubleshooting

- Have you already tried X? If yes, the next step I would recommend is...
- I can fix this for you.
- Give me a second, <Name>. I will figure this out for you.
- I am working with my team to get this done for you as soon as possible.
- You certainly are an expert on this. All you need to do now is...

LESSON 3

Handling Difficult Conversations

Dealing with difficult customers

In support, you often have to deal with difficult customers who have very little patience to hear you out. Here are some tips you can use to make these conversations easier:

- Show them you understand.
- Be quick to apologize.
- Set expectations.
- Don't play the blame game.
- Escalate, it's okay.
- Change agents.
- Establish equality.
- Train yourself.
- Face it head on.

Watch related video



9 tips for dealing with difficult customers -
https://www.youtube.com/watch?v=6muow_lCxOY



Saying 'No' in customer service

Saying no to customers does not necessarily mean you have to disappoint them. Here's how you can say no to customers the right way:

- Say no quickly instead of giving them false hope.
- Always ask why they want what they want.
- Suggest alternatives and resources.
- Do not overcompensate with goodies or apologies.
- Treat every 'no' as the first 'no' of the day.
- Express empathy and regret.

Watch related video



How to say no in customer service -

https://www.youtube.com/watch?v=W_HYizKl4yg

Saying 'No' the right way

Scenario: A customer is asking you to do their job (X) for them.

Hi Emily,

I prepared a document for you that will walk you through the steps to do X. You can get this done in no time :)

However, if you do face any difficulties, please let me know. We can get on a call and I can guide you step by step.

Regards,

Gina



LESSON 4

Being Motivated

Motivation in customer support

In support, the repetitive nature of work can often lead to demotivation. To keep yourself motivated, here are some strategies you can follow:

- Listen to music while working.
- Add some variety to your work.
- Take on bigger responsibilities.
- Take up interesting side projects outside work.
- Make every interaction count.
- Stay up-to-date and connected.

Watch related video



Overcoming demotivation in customer support -
<https://www.youtube.com/watch?v=igxfVW428U4>

LESSON 5

Being a Customer Champion

Communicating customer feedback

Customer support does not end at just talking to customers. You also have to communicate their feedback to various internal teams. Here's how you can do that:

- Send them an email about the customer's issue.
- Use analytics to identify major customer pain points.
- Tag issues with right keywords to establish context.
- Give the concerned team a chance to talk to customers directly.
- Do proper research before you take up the issue with another team.
- Co-own the solution with the internal team and be their single POC.



Watch related video



Communicating customer feedback -

<https://www.youtube.com/watch?v=3386EZTGdAU>

For more such courses, enroll in the Freshdesk Academy today.

<https://freshdesk.com/academy>

ON SELF-SERVICE

A Guide to Getting Started with Your Knowledge Base





70% of customers prefer to use a company's website to get answers to their questions rather than contact customer support via phone or email.

Forrester

Customer Service Trends Report

A knowledge base is a library of information that will help your agents and customers learn how to use your product or service and find answers to their problems faster. Building one from scratch might seem like a daunting task. So we've put together some pointers to help you out!



STEP 1

Before you begin

Establish a structure

- Create a hierarchy to organize your articles.
- Choose top level categories that users will recognise.
 - For example, types of services, user role/plan or product usage
- Add a **maximum of 3 levels** to your navigation.

Category > Folder > Article

Shipping and Delivery > Track your Parcel > Track by

Understand user pain points

- Try the procedure yourself to understand the user experience.
- Have your teammates try it and note where they get confused or make mistakes.
- Look at FAQs to know where users usually need help.

Write for the average user

- Make each article easy to scan and understandable in just one read.
- Write articles that are a mix of detailed how-to instructions and common user problems.
- Split up one topic into multiple articles, if necessary, to avoid too much information in one article.



While writing articles

Follow a tone/style guide

Create a tone/style guide that reflects your brand's voice. Here are the **top 8 points** from our guide:

- Use simple language, leave out the technical jargon.
- Use short sentences (maximum 100 characters).
- Write in the active voice and be conversational.
- Focus on features, not benefits.
- Use a common example/scenario across articles.
- Highlight titles and subtitles appropriately.
- Use tables or bullet points to depict lists of items or steps.
- Annotate images to draw attention to the right icon/feature.

Cater to different learners

- Use screenshots and videos to explain features, especially complex ones.
- Create short animated GIFs to show a series of steps.
- Find the right balance between text and visual content.

Sweat the details

- State the prerequisites upfront.
 - For example, the plans that a feature is available on, OS/hardware requirements
- Don't leave out tiny details because you think they are obvious.
- Create notes or info boxes to specify what your product cannot do.



Make navigation easy

- Interlink solution articles to improve navigation.
- Include a table of contents for long articles or articles in a series.
- Don't repeat information, redirect users to the relevant article.
- Create a related articles section to guide users to other articles.

STEP 3

Scaling your knowledge base

Make it easy to find

- Link to your knowledge base from your website, your product, any relevant emails you send to customers.
- Update SEO parameters like meta title, description, image title and alt text, so articles are found easily by search engines.
- Add options (chat, email, phone or a contact form) for users to get in touch directly with the team.

Keep it up to date

- Appoint a teammate to update and improve the knowledge base.
- Review/archive articles with consistently low views and move the content elsewhere.
- Maintain the hierarchy and avoid adding too many categories/sections.

Actively listen to feedback

- Provide an easy way for your readers to give feedback on the content.
- Reach out to customers to see if your articles are helping them solve their problems.
- Use analytics to understand what's working and what's not.



Tools we use

Here are some tools that will help you create content for your knowledge base easily:

- **Google docs** – to collaborate with multiple stakeholders
- **Freshdesk** – as a knowledge base provider
- **Quicktime** – to record screencasts
- **Sketch** – to annotate screenshots and create graphics
- **LICEcap** - to create short GIFs
- **Grammarly** – to spell check the articles

Anatomy of a solution article

Here's a template to get you started on your first solution article:

Article title

Keep it simple and short, add keywords that users would search for

Body of the article

- **Prerequisites:** OS/hardware/browser requirements, user role/plan
- **Problem statement:** Describe the problem the feature will solve
- **Table of contents:** For long articles or multiple articles in a series
- **Video tutorial:** Show a video tutorial upfront, if there is a setup guide
- **Setup guide:** Use bullet points, 1 step per point, mixed with images
- **Use cases:** Describe how the feature can be used
- **Interlinks:** Link to other feature articles logically
- **Exceptions:** Use info boxes to call out extra information



Feature FAQs

Anticipate customer questions and provide quick answers

Related articles

Suggest a follow-up or related article

Article feedback

Add a survey asking if readers found the article helpful



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