Reinventing customer service
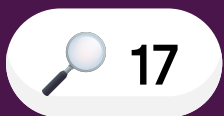
How post-pandemic service teams are using Slack to reshape the discipline.

slack

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Finding a better way

🔍 17

The upheavals of 2020 will have a long-term impact on the way we work. They've created an opportunity for every organisation to embrace better ways of working—approaches that combine the best of what we had before with the new, more efficient processes discovered during lockdown.

This is especially true for customer service teams. The overnight move to completely remote working disrupted many service processes and call centres. But they also exposed new ways to think about service delivery and how best to support the people who do such important work.

Big challenges lie ahead—key among them being how to respond to skyrocketing customer expectations, while reinventing the way service and support teams operate.

Five themes dominate the new world of work

To understand what the new world might look like, we talked to business leaders across disciplines, industries and countries about what comes next. Five big themes emerged (explored in our ebook "**Reinventing Work**")—and they apply to just about every organisation:

- Employee engagement is breaking free from the 9-to-5 mindset

- Culture and alignment are the next source of competitive advantage

- A new ecosystem economy demands a new partner playbook

- Customer-led disruption is forcing rapid CX convergence

- The winners are accelerating work through automation

In this guide, we'll look at what these themes mean for service leaders and show how customer service teams around the world are helping their organisations meet new challenges with Slack.

1.

Employee engagement is breaking free from the 9-to-5 mindset

💡 25

At the heart of great customer experiences are service agents who are empowered to collaborate effectively and establish stronger, more personal connections with customers. These "super agents" are emerging in organisations that make it easy for agents to resolve issues and delight customers.

Here's how managers are setting their agents up for success in the new way of working.

The emergence of streamlined onboarding

The road to becoming a full-fledged support agent used to be littered with outdated docs, lengthy wikis and tedious "fwd:fwd: Do you know the answer to this?" emails. Today, Slack's searchable channels are helping newbies develop the deep product knowledge and strong cross-functional relationships they need to succeed—in a fraction of the time taken previously.

When same-day delivery provider **Shipt** needed to scale its shopper operations team fast, it used Slack's Workflow Builder to create a welcome bot called Successor. Successor brought new hires up to speed in record time with a helpful overview of all the available resources (including searchable FAQs) in Slack. Being able to loop in experts in real time via Slack was another major confidence booster for newbies.

"

From a communication standpoint, Slack is the lifeblood of our team. We use Slack channels as a collective knowledge base to source answers ... which ultimately helps us successfully deliver on our KPIs."

Brian Malone, Director of Customer Service, Shipt

The rise of micro-coaching

Agents who work remotely can't raise a hand for help—or lean across to a colleague for a quick steer. (Ticketing platforms aren't a great setting for real-time coaching as they were never designed for conversation.)

Centralised collaboration platforms such as Slack allow managers to do more "micro-coaching"—initiating conversations around performance issues and providing crucial coaching *in real time.* Because Slack is channel-based, managers have a high-level view of each agent's struggles with particular issues. Training and coaching opportunities surface faster, and managers can act in real time to drop a link—in a message or channel—to a course in the LMS.

Intuit QuickBooks uses a custom Slack app (a conversational bot actually) called Quincy to support its agents. When Quincy can't answer a question, a request for help is automatically sent to the relevant product champion. The product champion then turns the situation into a valuable learning experience for the support agent. **Quincy has increased agent confidence by 20% and NPS by 12%.**

UNLOCKING AN EXPERT ECOSYSTEM AT INTUIT QUICKBOOKS

More satisfied agents, more satisfied customers:

20%
increase in agent confidence

36%
increase in agent efficiency

12%
increase in NPS

🙂 16

"

Micro-coaching is actually driving the skill set to a level we've never seen before."

Omer Khan, former Customer Success Digital Lead, Intuit QuickBooks

2.

Culture and alignment are the next source of competitive advantage

✨ 31

As many businesses have found, old-school command-and-control management styles don't work well in a remote work environment. It's easy for vital communications to be missed—and harder for leadership to take the pulse of how employees are feeling.

In a time of heightened stress and anxiety, this can lead to loss of alignment, lower morale and more employee burnout. By contrast, organisations that entered the WFH era with a transparent approach to knowledge sharing have succeeded in keeping teams motivated and aligned.

> **Organisations that increased transparency with employees after March 2020 experienced an 85% increase in employee engagement.**
>
> **O.C. Tanner**

📈 **17**

Openness as the default management style

For many service teams, Slack has emerged as the platform of choice for two-way internal communications, hosting everything from CEO Ask Me Anything (AMA) sessions to employee pulse polls.
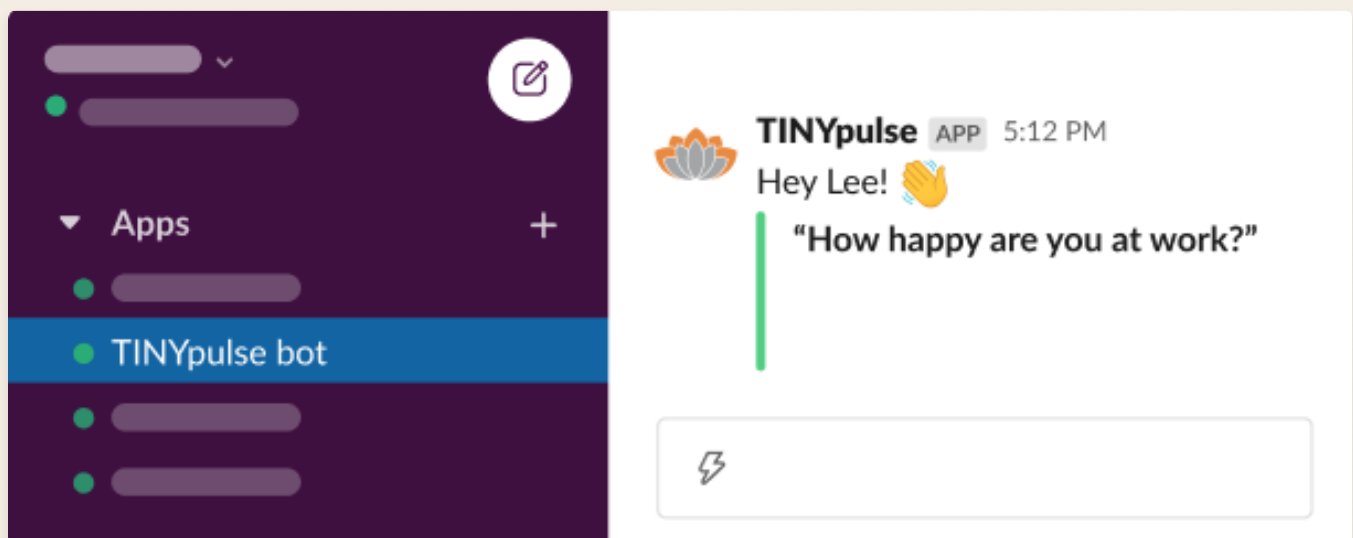
Slack's unlimited channels mean it's easy to set up dedicated channels for company announcements and Q&A sessions with senior leadership. Emojis make it easy for employees to indicate their thoughts and feelings about specific communications, while threads make it easy to reply and see how others have replied.

Because Slack is a two-way street, employees feel more involved in company announcements than they do with the old-style CEO emails—and are less likely to overlook vital information as a result.

Nordstrom's customer service teams are distributed across several countries, so keeping everyone on message and up to date is vital. When policy changes happen, Nordstrom relies on core communication channels in Slack to disseminate the news to all their agents at once. And for distributed teams, Slack's great at making people feel they belong.

"

Imagine having 70% of your team working from home. They're bound to feel excluded. ('Where is my supervisor? How do I get that face-to-face interaction?') And so we made sure every supervisor includes a one-on-one Slack Call in their daily routine. Supervisors get themselves in front of each agent, facilitating role play and having great conversations about how to serve customers. This goes a long way in ensuring that these agents still feel included in the workforce." [1]

China Scroggins, Operations Manager for Customer Care, Nordstrom

[1] N.B. This quote has been edited for clarity.

The triumph of collaboration and alignment

Many important conversations take place outside even the most comprehensive support solutions like Salesforce Service Cloud or Zendesk. Which means that support agents often have to hunt down information across different apps (mail inboxes, custom dashboards and knowledge bases) to solve a single ticket.

Savvy service leaders are using Slack to connect the entire support stack and integrate all the key service systems in a single place. These integrations also let agents pull ticket information to and from Slack channels and collaborate directly with managers and internal experts on cases—without leaving their primary ticketing tool. As they work on tickets, agents update customer records and other internal databases from Slack to keep everything up to date and moving forward.

Zendesk knew it needed to evolve to meet high customer expectations. Instead of acting in sync, departments were using different communication tools and creating information silos. By shifting all collaboration to Slack, Zendesk's teams were able to swarm issues effectively, cut resolution times and raise the bar on customer service.

"

Slack drastically reduces the time to overall resolution. It allows you to get closer and more connected to people across the company."

Jon Brummel, Director of Enterprise Support, Zendesk

Culture and alignment are the next source of competitive advantage

Zendesk

● Harry Boone

#acme-zendesk

▼ **Channels**

acme-zendesk ◀▶

announcements

ask-competition

🔒 patnerships-int...

tech-alliances

win-wire

▼ **Direct messages**

♥ slackbot

● Matt Brewer

● Arcadio Buendia

● Zoe Maxwell

Harry Boone 1:09 PM
Hey Acme team 👋 I have a customer interested in a demo of your new training software. How can I set his up?

👀 1   😊⁺

Matt Brewer 1:15 PM
🟦 Hi @Harry Boone thanks for the lead. I can definitely do the demo. I'm available tomorrow from 10 am to noon Eastern. Will that work?

🙆 1   😊⁺

Harry Boone 1:18 PM
@Matt Brewer thank you! Let me check with the customer. Stay tuned.

👍 1   😊⁺

🟦 Acme is in this channel

⚡ Message #acme-zendesk

3.

A new ecosystem economy demands a new partner playbook

👏 28

One of the most intriguing aspects of remote working is that organisational boundaries become less defined. When people collaborate digitally rather than in an office, the distinction between "working with colleagues" and "working with partners" starts to melt away.

This is accelerating a move towards an "ecosystem economy," where multiple organisations work together to create new products, services and experiences. The more easily they can collaborate—while still maintaining security—the faster new value can be created.

"

It is less and less likely that single firms can offer all the elements a customer needs. And so ecosystems, especially designed ones, are on the rise."

Harvard Business Review

A drive to form new connections

The best service teams are building trust and earning loyalty by staying in close contact with customers. They're also looping in cross-functional partners to help nurture the entire customer journey. But working with customers and partners needs to be as easy as if they were right there with you.

Take **ModSquad**, a globally distributed crew of customer experience experts who help clients engage with their audiences online. ModSquad uses Slack Connect to create a secure bridge with its clients, so everyone can collaborate as if they were on the same team—which is exactly what they are. ModSquad now has more than 50 Slack channels for its clients where files and messages are shared, and projects and support can be coordinated in real time.

Such channels become a secure, shared environment for direct, white-glove support. Customer service teams can be connected to their preferred ticketing system and custom workflows created to make it easy for customers to submit requests with all the necessary information. For example, ModSquad uses a **Zendesk Slack integration** to track service desk tickets, troubleshoot and resolve issues.

#kudos ☆

👤 25 | 🔖 1 | ModSquad clients and teammates recognize exceptional service

ⓘ

Lisa Zhang 10:55 AM
🟧 I just want to express how happy I am with the exceptional customer service Zoe Maxwell has provided for our team on behalf of ModSquad. She has been super friendly and helpful. Thank you so much!

😍 1   😀⁺

Zoe Maxwell 11:00 AM
Thank you, Lisa! You and your team were very helpful and a pleasure to work with :)

🎉 1   😀⁺

Arcadio Buendia 11:05 AM
🟧 I'd like to give some major kudos to ModSquad's Lee Hao. He has been so quick with responses and any actions we've needed to date. He's made our experience with ModSquad so easy and productive. Thank you, Lee!

🏆 1   😀⁺

Lee Hao 11:10 AM
No problem Matt! I'm so glad I've been abe to assist you all, you've been great to work with as well.

👍 1   😀⁺

"

Slack has brought us closer to our clients. I see clients pinging Mods to give them kudos if something has been handled well. Or sharing a thumbs-up or celebration emoji if there's a good CSAT. A 'thank-you' from a client truly means the world to us."

Stephen Dunne, Director of Client Services, ModSquad

4.

Customer-led disruption is forcing rapid CX convergence

📢 20

Customer experience (CX) was one of the biggest differentiators for businesses even before the upheavals of 2020. Then the year of staying home and working remotely further transformed the way people buy—and their expectations of the companies they buy from.

Customers have come to want and expect an effortless digital experience, whether they're ordering a takeout coffee via an app or digitally signing a multimillion-dollar IT contract on a video call with a sales rep.

The reduction in face-to-face contact means entire customer journeys are now happening digitally—from awareness to research, purchase and support. Customers want to feel like they're dealing with a single company whether they're interacting with sales, marketing or service. In the most customer-centric companies, we're seeing the walls between these teams starting to dissolve, making collaboration seamless and CX unified.

"

Three priorities will define customer experience in the post-pandemic era: digital excellence, safe and contactless engagement, and dynamic customer insights."

McKinsey, *Elevating Customer Experience in the Next Normal*

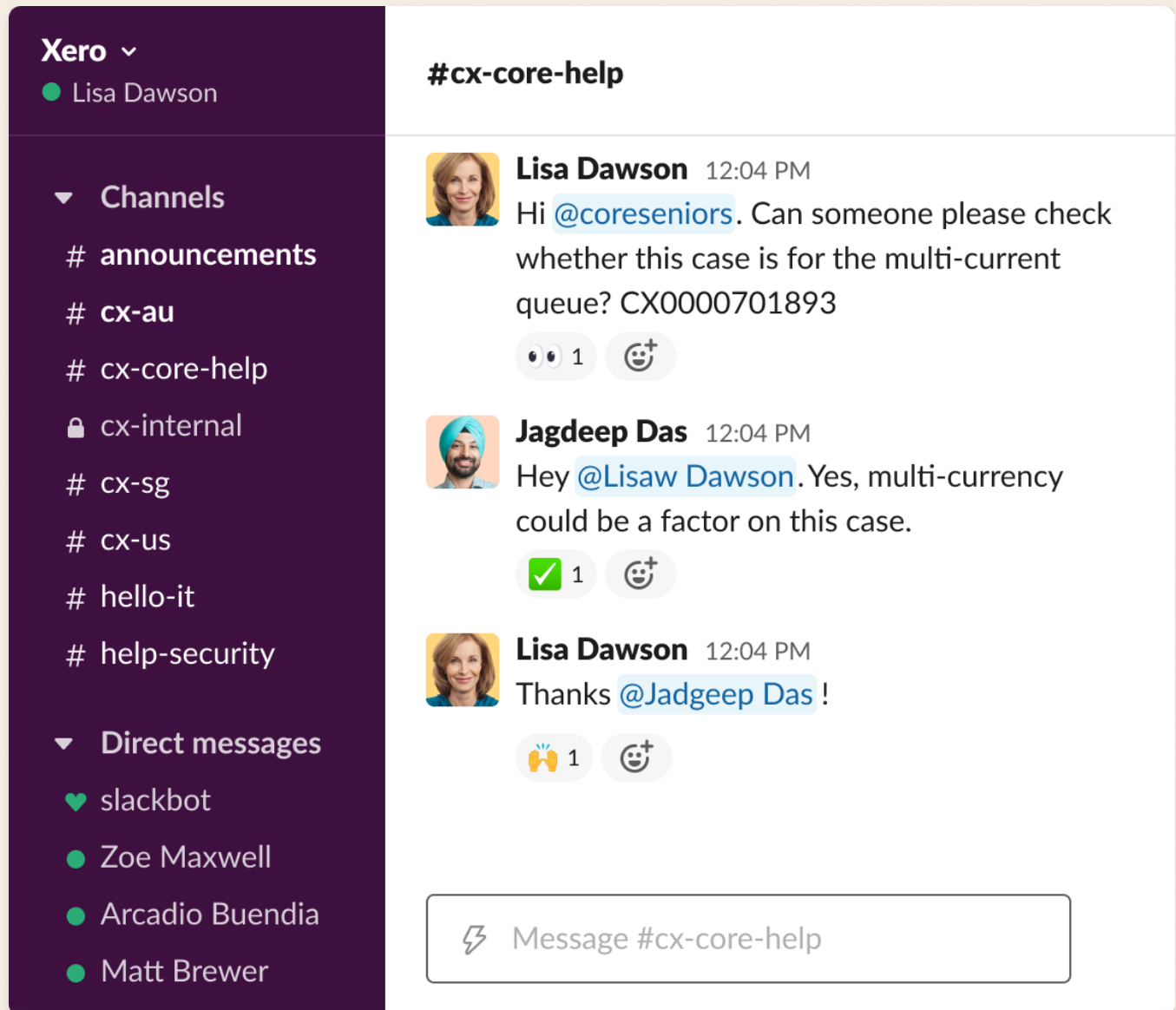## The last gasp for email and the birth of the digital HQ

Service teams already know that you can't escalate time-sensitive customer issues via email. With remote work, the fragmentation of communication systems is even more problematic. If you need to loop in an expert, do you use email, a chat app, phone call or support ticket…? This disconnect leads directly to customer service disruption and delay.

Having a digital HQ—a central place for interaction and collaboration—has become critical in bridging the gap between the ticketing tool where agents live and the rest of the organisation that doesn't live there.

Consider **Xero**, a provider of online accounting software. Until late 2017, Xero was using just about every messaging tool available: Yammer, Flowdock, Google Hangouts, Skype. Nothing was interconnected and there was little opportunity

Customer-led disruption is forcing rapid CX convergence

for cross-functional collaboration—information was collected and distributed in silos. Today, Xero's customer experience team has between 30 and 40 Slack channels and any agent who needs guidance can reach out instantly to SMEs who are online.

Xero ⌄
🟢 Lisa Dawson

#cx-core-help

▾ **Channels**

\# **announcements**

\# **cx-au**

\# **cx-core-help**

🔒 **cx-internal**

\# **cx-sg**

\# **cx-us**

\# **hello-it**

\# **help-security**

▾ **Direct messages**

💚 slackbot

🟢 Zoe Maxwell

🟢 Arcadio Buendia

🟢 Matt Brewer

Lisa Dawson 12:04 PM
Hi @coreseniors. Can someone please check whether this case is for the multi-current queue? CX0000701893

👀 1

Jagdeep Das 12:04 PM
Hey @Lisaw Dawson. Yes, multi-currency could be a factor on this case.

✅ 1

Lisa Dawson 12:04 PM
Thanks @Jadgeep Das !

🙌 1

⚡ Message #cx-core-help

With a Digital HQ, customer feedback can be swiftly translated into business impact. For instance, agents may flag a recurring technical problem to the dev team, or a persistent billing issue to the finance department. Key customer insights are no longer locked in siloed systems (such as ticketing tools, CRM systems or email chains) or simply delayed by inefficient communication workflows. Response and resolution happens naturally.

What's more, custom bots in Slack can surface key trends from across many different sources of insights. For instance, a bot can scan support tickets to see that the term "can't upload" occurred 12 times in a day—clearly something the product team needs to know about.

> **"**
>
> Slack is ingrained in the way we communicate and work at Xero. It has enabled faster and more transparent information sharing across our teams, improving employee engagement and ultimately making it easier to build beautiful products."

Levi Allan, Executive General Manager, Practice and Compliance, Xero

Hybrid customer support journeys become the norm

Customer support is moving beyond service desks to include those best equipped to solve an issue—wherever they may be. But responding quickly, at scale, can be tricky in a hybrid or remote work environment. An effective collaboration platform makes the most of synchronous and asynchronous collaboration to solve customer problems.

By replacing the traditional one-to-one relationship between customers and agents with a one-to-many situation where agents can immediately tap experts for answers in real time, organisations can swarm the toughest challenges with their most qualified personnel.

The edge cloud platform **Fastly** uses a Slack channel to bring executives and subject-matter experts together to resolve critical support issues. Key participants fire off responses via Slack's mobile app to keep resolutions moving along—even on weekends.

> **"**
>
> With Slack, we can see activity almost instantly, triage events if needed, determine the severity, and pull other people in. All in real time."

Kim Ogletree, VP Customer Success, Fastly

5.

The winners
are accelerating
work through
automation

🔄 25

Intelligent, connected technologies are helping service leaders create a more efficient division of labor between people and software, so agents can spend more time engaging with customers.

For most service leaders, the pandemic accelerated this trend towards optimising resources and automating processes. And since any change in the world—from a new product launch to a pandemic—generates spikes in customer service requests, automation lets service teams scale up without dropping any balls.

Unifying the support stack becomes a priority

The sheer number of tools that support teams use is often what slows agents down. Seventy-seven percent of support teams use between one and 10 different tools just to do daily tasks, and 44% of teams use between six and 10 tools.

Audiology platform and billing specialist **Smartcare** streamlined communication between its support staff and clients by integrating apps with its Slack workspaces. By providing a layer of technology to connect Smartcare's communication with its tech tools, Slack has reduced context switching, simplified administrative tasks and given the team more time to spend with customers.

"

Slack is the connective tissue that keeps us all in sync and keeps all the data coordinated."

Skylar Topham, Co-Founder and CEO, Smartcare

Process design removes productivity roadblocks

Any repetitive process that eats up valuable time is ripe for automation—and Slack's drag-and-drop **Workflow Builder** makes process automation in Slack incredibly simple. It allows any Slack user to create custom workflows for day-to-day processes. A single action can trigger a whole series of events, actions, alerts and data flows.

Online insurance provider **Oscar Health** created tiered Slack channels to share knowledge and help customer service representatives find answers fast. When queries to its Tier 3 expert channel for complex issues started arriving without crucial background information, Oscar Health used Workflow Builder to prompt service representatives to fill out a form with all the information needed for a speedy resolution.

"

Before, there was a lot of back-and-forth in the channel. The form gave us a standardised submission process so supervisors receive all the information necessary to solve the issue."

Sebastian Burzacchi, VP Service Operations, Oscar Health

Talk to us about supporting your new way of working

👑 34

"

This isn't some far-off future; this is now, and next year, and the year after that, if we only embrace the opportunity to reimagine and the responsibility to reinvent."

Stewart Butterfield, Co-Founder and CEO, Slack

For most service teams, pre-pandemic work was too fragmented, siloed and manual. Going 100% remote wasn't easy, but it did uncover a host of new opportunities for improving the way service is delivered.

The coming years will be about seizing these opportunities to improve the way customers are supported and service teams are enabled. For more and more service organisations, Slack is the critical piece of the puzzle.

Talk to us about how we've helped service teams all over the world find a better way—and how we can help yours too.

The business value of Slack for customer support:

Resolve customer tickets with more speed and precision by tapping into the collective knowledge base available in Slack. Integrations with customer support software allow support teams to triage issues quickly and transparently, monitor social chatter and buzz, and even respond to customers directly from Slack.

31%
average reduction in ticket resolution time

8%
more tickets routed correctly

7%
more tickets resolved correctly

IDC The Business Value of Slack

14

About Slack

Slack has transformed business communication. It's the leading channel-based messaging platform, used by millions to align their teams, unify their systems, and drive their businesses forward. Only Slack offers a secure, enterprise-grade environment that can scale with the largest companies in the world. It is a new layer of the business technology stack where people can work together more effectively, connect all their other software tools and services, and find the information they need to do their best work. Slack is where work happens.