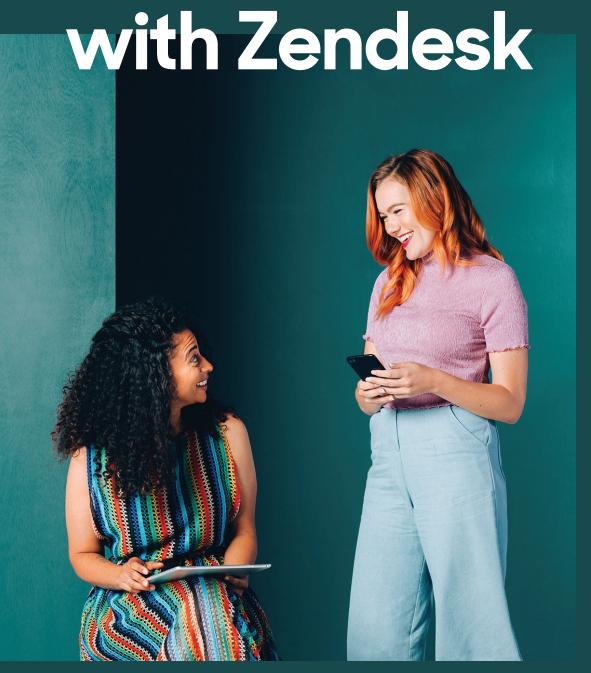
# Conversational support made easy





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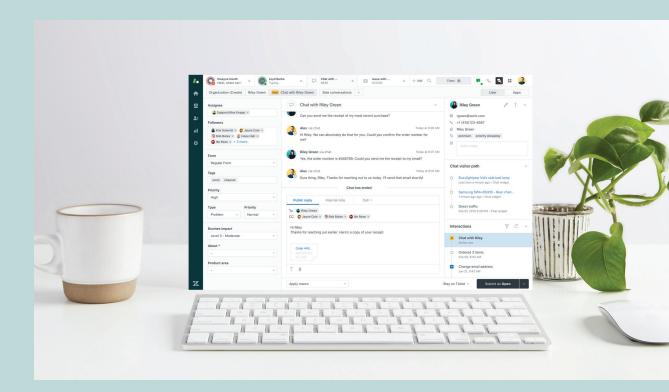
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#### 1. Introduction



For many businesses, it's difficult to keep up with evolving expectations concerning where and how your customers can get help, and how quickly you can respond. Depending on the size of your support operations, it might seem safer and simpler to stick with a single communication channel and to focus on providing really good support. That's all well and good, except that research in the Zendesk customer experience trends report 2020, featuring data from 45,000 businesses across 140 countries, states that high-performing teams are twice as likely to take an omni-channel approach to customer support.

And companies are starting to view every customer interaction that takes place across these channels as part of a conversation.

We're not just talking about having conversations with your customers via email and over the phone any more. Sometimes, customers want to look up an answer for themselves, or better yet, get a chatbot to do it for them. Increasingly, they want to engage with businesses as they do with their family and friends, whether that's sending a quick text or DMs on Facebook. Or a customer might start a conversation on Facebook Messenger, pick it up from email and take it in another direction over the phone a week later. Regardless of the channel, your customers expect consistent, fast and personal experiences from wherever they are, without compromise. Now, that's what natural conversations are about.

### More channels shouldn't mean more problems

We know it can be complicated to be everywhere at once. But we also know that providing omni-channel support shouldn't create more problems. With Zendesk, customer conversations are natural because they flow seamlessly across channels, creating a better experience for your customers and your agents. Providing the best support begins with the customer — and tailoring your offerings to meet their requirements.

There are a few ways of doing this. Customers often use the contact touch-points that they prefer or that are most familiar. Sometimes though, what we want or prefer isn't always what we need. Channel usage can have just as much to do with context and convenience as with preference. In fact, customers often change channels based on no more than what they happen to be doing.

With our phones in our pockets and the Internet on our phones, there's no bad time to ask a question. Based on the complexity of the question, how convenient it is to find help and the context – who the customer is, what they're doing and how urgently they need an answer – the right channel will often make itself apparent. What's crucial is to provide a seamless customer experience, no matter what the channel might be. Use this guide to help determine how your company can have natural conversations with your customers, wherever they are, without letting them know what's going on behind the scenes.



### 2. Fostering next-generation conversations

At Zendesk, our goal is to make it easy for businesses to have natural conversations with their customers – conversations that flow seamlessly across channels. We've also come up with some guiding principles to help keep your customers at the heart of the decision-making process when deciding what those experiences should look like for your business: We call them the "the four Cs". The right answer will take into account each of the following: conversations, customer context, collaboration and customisation.





#### Conversations

It's clear: A great customer experience is one that feels natural, and that's what this C is all about. Customers don't want to work hard to get answers, nor should they have to. And part of having a natural conversation with your customers involves making it effortless for them to get help by being where they expect you to be, so they can contact you however and whenever they want to.

Taking the time to consider the types of question you see most often, as well as looking at the age and location of your customers, can be an eye opener. Industry best practice might tell you to offer a particular channel, but if, for example, you have a massive client base that prefers a mobile-first option, your support should be mobile first too, because that's what your customers expect.

Ask yourself: How easy is it for your customers to get help? Can they find answers on their own? Are they able to contact Support without a laptop or web browser when technology fails? How long does it take for customers and for agents to go through each leg of the journey to resolution? The answer to these questions might be the difference between whether you offer live chat and email, email and SMS, or perhaps even SMS and something else.

While customers expect a choice of channels, they also don't appreciate experiences that exist in a vacuum. Instead, they value being able to pick up with a business where they left off, and appreciate when a business recognises that it's dealt with them before. This requires unified support that connects every interaction, whether it's asynchronous or in real time, so that agents know key details – such as the customer's email address, order history or why they last contacted you. Otherwise, the experience isn't natural and isn't conversational. Having natural conversations with your customers provides them with the gift of an effortless experience, wrapped in personalisation and fast responses, which the following 3 Cs can help with.



#### **Customer context**

Behind every customer and each interaction is a story. And customer context is about knowing the story before the customer gets in touch with you. What's more, customers expect companies to collaborate internally so that they don't have to repeat themselves and tell their story over and over again every time they seek help. The best way to turn a perfectly content customer into an annoyed complainer is to prolong solving their problem by asking them for contextual information that they assume you already know, such as their account type or how long they've been a customer.

Imagine having to reintroduce yourself to a colleague every time you see them in the kitchen and remind them of what you last talked about. It's not natural to make a customer reintroduce themselves every time they contact you either, but that's the reality of many support experiences.

This is often because customer data lives in multiple places and teams don't have the crucial details they need to deliver the personal experience expected by customers. And with companies managing <a href="three-times">three times</a> as much data as they did five years ago, keeping conversations customer centric has only become more difficult.

Again, solving this challenge starts with integrated support that arms agents with background information and conversation history for each conversation. With this, agents won't have to search for the details they need and customers can have a more intimate experience, which boosts agent productivity and gives you customer-satisfaction Brownie points.

#### **Collaboration**

Findings show that more than 70% of customers expect companies to collaborate on their behalf. Agents are on the front line with your customers, but they don't need to be the only ones with all the answers. In fact, giving customers the most accurate solution often requires agents to connect with other teams without losing context along the way or disrupting their workflow. For instance, if you're a B2B tech company and you're handling technical issues, reports of bugs or system glitches, you'll want to be sure that the right team can deal with known issues and take action when required, whether that's confirmation, approval or more information.

However, inefficient processes often stand in the way of effective collaboration, which makes things complicated for your customers – 68% of customers are annoyed when their call is transferred between departments. To deliver an easy experience that aligns with your customers' expectations and ensures that agents won't be stressed out with every rise in ticket volume, businesses need to equip their support teams with tools that enable them to work cross-functionally, while still providing responsive support. Pro tip: Integrating your support system with your internal tools (like Slack) is a great way to share best practice across departments.

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#### Customisation

Customers make channel decisions based in part on their age and demographics, and in part by the type of problem they're experiencing. Email or self-service might be the way to go for a question that isn't time sensitive, but needing to exchange a dress or suit in time for a wedding is a different matter, one which will almost certainly involve the telephone or live chat. The key to having consistent yet contextually appropriate conversations based on each unique customer, use case or channel is to customise your support environment so that an inflexible workspace doesn't get in the way. After all, high-quality support experiences at the front for your customers are next to impossible with complicated workflows at the back for your agents.

For example, you might streamline a workflow by directing tickets to the agent who's best equipped to deal with that particular problem. Or, you might create unique ticket interfaces for each agent based on the type of support they specialise in.

Apps and integration are another way in which agents can customise their workspace to make it easier to find relevant information for each unique conversation. For instance, if a retailer uses Shopify to manage their online orders, they can integrate that information to have more granular data on the purchases that a customer has made, such as the order status. Besides, Benchmark data shows that high performers use 50% more apps and integration on average, which is one of the reasons why four out of five managers plan to add additional apps and integration to their support environment next year.

However you choose to customise your support environment, this C is all about reducing effort from agents, increasing productivity and empowering you to treat customers like humans, not tickets.

### 3. Find solutions for the best outcome



When it comes to selecting which contact touch-points will be at the heart of your customer conversations, consider the business problems that you're trying to find solutions for and how replacing a channel or opening up a new channel might solve operational challenges. For example, these indicators might signal that you don't have the right support touch-points in place:

- Low customer or agent satisfaction ratings
- Slow agent response times or large backlogs
- Too many drawn-out, to-and-fro conversations
- Answering the same questions over and over again
- The inability to prove that you aren't just a cost centre and that your agents are contributing to customer conversions



#### Increase customer satisfaction

Raising customer satisfaction has everything to do with providing convenient, effortless experiences. This is why channels that require the least amount of effort (live chat and messaging, for instance) consistently lead to higher customer satisfaction ratings.

Investing in self-service also goes a long way towards increasing customer satisfaction. In fact, high performers are 76% more likely to offer self-service and 60% more likely to have an active community, according to Zendesk Benchmark data. A well-designed, well-maintained self-service option allows your customers to solve problems themselves in real time.

Context affects customer satisfaction as well. If your customers are heavy mobile users, or if you have an app, then help should be available in the app. Or you might consider adding SMS or messaging apps as a support channel. In fact, Benchmark data also revealed that third-party messaging has a CSAT of 98%, the highest across different channels.

Phone and email support shouldn't be discounted here. Voice support is an important escalation channel, regardless of where a conversation starts, and remains the best way to handle urgent or sensitive concerns that require a live, human conversation. Email remains a top channel for highly complex issues that require multi-step instructions or visuals. It can also yield high satisfaction ratings, particularly with tools like predictive satisfaction analytics. These use AI to help you determine which contacts are at risk for low satisfaction ratings so that you can take proactive steps to turn the customer experience around.

#### Channels that can raise customer satisfaction:

- Chat
- Self-service
- SMS
- Messaging apps
- Voice
- Embedded support



#### **FOSSIL**

"We want to make as many channels available to our customers as possible. Zendesk gives us a system where the customer can engage with us in the way that they want to, and we then have the capability to serve them all the way through."

- Bernie Gessner, Vice-President of Global Customer Care & Retail Operations at Fossil

#### Raise revenue

Convincing the powers that be to invest in better customer service is hard when you're fighting the perception that customer support is "just a cost centre". You know that your agents provide great customer experience and influence future business, whether that's by winning a customer or keeping one from leaving, but it's hard to quantify.

The good news is that proactive support is one way to prove clearly that your team is moving the revenue needle. Data has shown that customers are three times more likely to make a purchase when you contact them proactively via live chat. By embedding chat on a checkout page, or even a 404 page, agents have the opportunity to

engage the customer before they abandon their basket or leave your site. Wherever it is that your business loses customers is the perfect place to put a live-chat widget.

Any channel that promotes real-time, person-to-person engagement, using tools that can track interaction outcomes, is one where you can best leverage opportunities to influence buying decisions. SMS text messaging can be another convenient way to prompt customers and, of course, voice is always a persuasive channel (e.g. "Need help with completing your purchase? Give us a ring!").

#### Channels that can have an impact on revenue:

- Chat
- SMS
- Voice





"We want to be anywhere and everywhere the customer is able to contact us, building a reputation for providing an immediate response, no matter the date or time. Zendesk allows us to do that."

– Dylan Henry, Director of Customer Experience at Handy



#### **Boost efficiency**

Often, increasing efficiency while reducing operational costs is best accomplished via channels that allow customers to find answers for themselves or that allow agents to help more than one customer at a time. This is why live chat, messaging apps and social media are all first-rate options for providing quick responses.

With the right tools, there are also ways to make email support efficient. Macros, or pre-written answers, help save time. Sorting tickets into views can help move agents through the queue in a focused way, or you can

set up business rules to
automatically route tickets where
they need to go and to ensure that
you meet your service-level
agreements. Zendesk's email, voice,
chat and self-service products all
offer features that help provide more
context, enabling agents to see
where a customer has already
looked for help and not have to start
every conversation from square one.

#### Channels to help boost efficiency:

- Chat
- Self-service
- Email
- Messaging apps
- SMS
- Social media



#### coursera

"Everything from Zendesk Chat to Guide to the core Support ticketing APIs has been tremendous for us."

- Mike Robichaud, Manager of Support Products at Coursera



#### Improve agent satisfaction

Bots are perfect for handling busy work – the type of thing that becomes rote, boring and repetitive for agents. Customer service can be a tough job, so agents appreciate it when you can automate things that take time and energy away from more challenging tasks. When you spend time on your knowledge base and invest in self-service, you can deflect a lot of ticket volume and give agents more time to solve more engaging issues.

Something to consider is that email can be more work for agents when the contact doesn't come in via a ticket form. Ticket forms help collect the right information for customers and allow you to create triggers to automatically route tickets to the right place. When it comes to agent satisfaction, chat is efficient and yields great customer satisfaction but, like phone support, can take an emotional toll on agents. They have to be "on", actively dealing with sometimes angry or rude customers. For this reason, part of your channel decisions should include how you would schedule your team to cover them.

#### Channels for improving agent satisfaction:

- Email
- Self-service
- Chat
- Voice





"Zendesk products have allowed us to deliver better support to all our clients. The agility with which we can implement new features and workflows is a key element to our success."

– Dan Ross, Support Operations Manager at Lightspeed

### 4. The Zendesk full-service experience



With a rise in new and emerging support channels, such as social messaging apps and SMS, managing interactions across touch-points is more difficult than ever before. What's more, customers expect availability on these channels, as well as personal and fast responses. To keep up with customers' expectations, companies are increasingly offering services that span communication channels and connect data so that each interaction becomes part of one longer conversation in the customer's history.

That's where the Zendesk Support Suite comes in. It's a bit like a secret recipe for the full-service experience – it unifies all your support conversations, while removing the pain of implementing and maintaining whatever channels your customers want to use for these conversations. This helps to ensure that communication is seamless, personal and efficient, which means more productive agents and more satisfied customers.

Because each key channel – whatever these are for your customers – are connected, everyone gains visibility into the customer behind the ticket and can see their full support history. Customers don't have to repeat themselves every time they contact you or move between channels. And it's easy to turn channels on and off with just a few clicks, allowing you the agility to adjust and grow along with your customer base.



"The Zendesk Support Suite helps my team by unifying support channels in one place, so customer support can respond and offer conversational, contextually relevant experiences across any channel."

- Jonathan Bolton, SVP Operations, BombBomb

#### **Unified conversations**

As we've previously discussed, companies are starting to view every customer interaction as part of a single, continuous conversation. And each of these conversations takes place across a number of different channels. We enable elevated, connected conversations with:

#### **Live chat**

Sometimes, customers just need quick access to help – not in 24 hours' time (e.g. via email) and not in a week (via postal services). And half of customers choose a channel based on how quickly they need a response. With live chat, you can engage customers in real time, in context and where they already are, for instance, having a look at a dress on your app or filling in a demo request on your website.

With the rise of AI, some companies are deploying chatbots to answer repetitive, frequently asked questions instantly, increasing agent productivity. Besides, 54% of consumers in one survey said that they would always choose a chatbot

over a human customer-service rep if it saved them 10 minutes.

Other businesses are using live chat to engage customers before problems arise. This might include engaging customers proactively during the checkout process so that they don't abandon their basket, or filling in a form when people are having trouble answering questions.

What's more, live chat welcomes real-time analytics, which can reveal real-time insights into customer satisfaction and agents' performance when managed with care.

With Zendesk Chat, you can manage all chat conversations from a single dashboard, whether customers are chatting with you from their laptop, mobile phone or via your app.



#### **foodpanda**

"Live chat lets agents handle multiple chats at once, so the waiting time is reduced and customers have a better experience."

– Jorge Vernetta, Global Operations Manager at Foodpanda

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#### Social messaging

In contrast to live chat, messaging is asynchronous and sessionless. This enables your business to be more available by allowing customers to contact agents outside your posted support hours.

What's more, when you communicate with your customers where they socialise –such as on WhatsApp or Facebook Messenger – it becomes a personal and intuitive way to interact within the context and convenience of their lives. And half of customers say that they like contacting Support using

the same channels they use to have conversations with their family and friends.

Adopting social-messaging channels as contact touch-points is also imperative to attracting the next generation of customers. In fact, 17% of people between the ages of 18 and 24 already resolve their problems with a company via social-messaging apps, and this number is only expected to increase.

With the Zendesk Social Messaging add-on, you can connect easily with customers on their preferred messaging apps, including WhatsApp, WeChat, LINE, Facebook Messenger and Twitter Direct Messages, conveniently bringing these conversations into a unified workspace for your agents.





"Shortly after making WhatsApp a customer-support channel at StashAway, we saw a shift in traffic from more traditional support channels like email to WhatsApp. It quickly became apparent to us that our clients preferred WhatsApp as a communication channel, and we were able to use it to increase our engagement with them. The WhatsApp Business API has been instrumental in helping us maintain our agility and continue to drive technological innovation."

- Michele Ferrario, CEO, StashAway



#### **Voice and SMS**

Even in the age of chatbots and social apps, a phone conversation is still a powerful way to solve a problem. For more complex issues like getting help with bank fraud or placing an order for 10 different people - customers often just need to hear an agent's voice. In fact, 40% of customers choose a channel based on the complexity of their issue. For others, the phone remains their preferred channel of interaction with a business because it's long established, explaining why it's a popular support option for baby boomers and Gen Xers.

And when they want to skip the small talk, text is a convenient option for busy mobile customers who want help, especially when they can't connect to a web browser or chat within a single, live session. In fact, Benchmark data shows that the number of companies offering SMS/ texting will grow by 43% over the next year.

Zendesk Talk makes it easy and efficient for agents to help customers over the phone or via text – from the same place that they manage all other channels.



#### TAYLOR STITCH

"Zendesk Talk allows our team to deliver excellent customer experiences as our business continues to grow. Our agents have everything they need – customer history, order details and previous tickets – all in one place, for fast, personal support."

- Mina Aiken, Head of Customer Experience, Taylor Stitch

#### ✓ Self-service and knowledge base

Everyone's a busy bee these days.

Customers don't really want to talk to you in the first place if they can find an answer easily on their own.

No offence — it's just the natural path of least resistance. Offering selfservice is now table stakes in support, and it's also a key predictor of how effectively you'll be able to contain costs as your business grows.

Besides reducing support costs, a great self-service experience can boost customer satisfaction by providing better service via knowledge management. It also leads to increased agent engagement by reducing the number of repetitive questions that agents spend time on, and grows community by building deeper connections between your organisation and your customers.

With all that said and done, 91% of customers only consider self-service an option if it's easy to use and tailored to their requirements.

That's where a smart knowledge base can help.

With Zendesk Guide, you can let your customers help themselves with a customisable Help Centre that agents can use directly from their agent interface. It also comes with contextual insights to help ensure that agents don't send articles a customer has already read and to help measure the effectiveness of your content.





"Investing in our knowledge base meant that we saw a massive decline in the number of support requests coming in. Partners were getting what I consider to be the very best service – which is that they never had to log a ticket in the first place."

– Mike Cartwright, Chief of Partner Solutions at Expedia® Affiliate Network



#### Embedded support

With customer expectations higher than ever before, customers tend to assume that help will be right at their fingertips. This often involves having native support on your website or within your mobile app.

Besides, native support helps to reduce friction for customers by keeping them where they already are. And with seamless support across devices and operating systems, you're able to better maintain brand consistency.

From our Web Widget, customers can access knowledge, start a live chat, message Support, make a call or just email you without leaving their experience - and high-performing customerservice teams are 32% more likely to use the Web Widget, according to Benchmark data.



"We love the Web Widget. Users aren't forced to search or hunt for relevant information, because it is presented to them."

- Tom Saul, Head of Marketing, Flare Apps

#### A unified agent experience

Connecting conversations across all of these channels requires an integrated workspace for your agents that makes it easy for them to respond, without making the experience feel unnatural for your customers.

For example, an agent may need to follow up on a chat conversation via email to provide more detailed, step-bystep instructions.

In the Agent Workspace, part of the Support Suite, agents can respond to customers across channels, including, chat, email, voice and social messaging, from one place – to continue the conversation on the channel that makes the most sense. This gives customers the convenience and personalisation that they expect.

#### Sophisticated tools

Having natural conversations with your customers across channels requires sophisticated business tools behind the scenes that bring value without being difficult. Here are a few in our tool box:



#### **Customer context**

The era of omni-channel support has made providing an integrated customer experience more complicated. But customers don't care what challenges you have at your end – if they have to repeat themselves three different times on three different channels, they aren't likely to come away from the experience feeling happy about your company.

Context gives agents the relevant information they need to provide faster, more personalised responses without having to ask the customer to reintroduce themselves every time they contact you for help.

We arm agents with context via an "essentials card", which displays relevant details about the customer that your agent is serving, as well as interaction history that gives agents visibility into all previous customer events.



#### **Analytics and reporting**

For conversations to happen wherever the customer is, teams need a customer-analytics tool that can keep up to track and manage these interactions effectively.

Otherwise, they're essentially being left in the dark.

With the right data about your conversations, you can explore things like: how a product update influences support outreach, which parts of your product or service are generating the most need for customer support and how effective your customer-service efforts really are. When handled with care, analytics can lead to increased response rates, customer loyalty and the avoidance of problems in the future.

Zendesk Explore integrates data from every channel so that you can measure how customers interact with your brand without losing the thread – and analytics can be shared across teams for greater insights at scale.

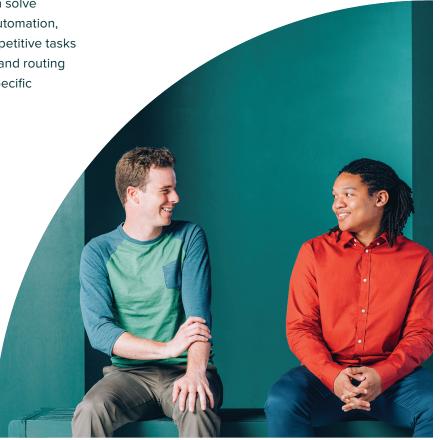
#### Business rules and routing

As your company grows its customer base, the volume of conversations that come in is likely to increase as well. And every customer who starts a conversation with you is likely to have a unique request – one might be about delivery rates, the next about product returns and another might be in a different language. It's not practical for all your agents to know about every product area, let alone be multi-lingual.

Business rules and routing help streamline ticket workflows and maximise team productivity, so your support can grow with your business. For example, with skills-based routing, you can assign the right agent to the conversation based on expertise – whether it's language, region, channel or product attribute – so agents are only served tickets that they can solve efficiently. Or, with workflow triggers and automation, you can minimise the number of manual, repetitive tasks that fall to your agents. Use business rules and routing out of the box or customise them to your specific requirements.

#### **Extended support**

Use our <u>app marketplace</u> to integrate with hundreds of tools for things like workforce management and agent productivity, or use our open and flexible CRM platform, <u>Sunshine</u>, to connect and understand data from external sources.



#### Powerful knowledge

Knowledge is power. Here's how more knowledge can lead to more powerful support conversations with us:



#### Superpowered agents

Speed is an important factor in whether customers are satisfied with a support conversation.

When agents can find answers immediately without having to leave their experience, it increases their productivity and reduces resolution time for your customers.

For example, with predefined macros and article recommendations that populate directly inside a ticket, agents can respond to common requests immediately.



#### Information that gets smarter

Managing a growing knowledge base can be tough. Support content is rarely evergreen – it needs to be constantly reviewed and regularly updated to stay relevant. That's why empowering your team to contribute to your knowledge base pays off. For instance, with Zendesk Guide, agents can provide feedback on knowledge, ensure that content is approved before publishing and schedule reviews to get the right people involved with article creation and upkeep – so your knowledge base only gets smarter with time.



Recent Zendesk research uncovered a compelling link between success, Al use and self-service. Al excels in the kind of work that frees up agents for more complex projects and problem solving – deploying a chatbot that automatically suggests relevant articles to customers so that they can find answers to quick questions on their own, for instance.

Or, Al can help identify gaps in your Help Centre by suggesting new articles to create and existing ones to update. For instance, if a rising number of customers are asking questions about a new software update, machines can flag this trend and suggest the best article topics to provide customers with the answers they're looking for effectively.



## 5. More channels, more solutions: a checklist for success



Of course, there's no magic formula for providing beautiful support experiences across emerging channels like WhatsApp, as well as traditional channels like the phone. Your success depends on how you enable your customers to have natural conversations with your business, no matter where they are, what device they're using or what their question might be.

But this also requires guiding customers to the best support channel for their requirements based on your resources. For instance, you wouldn't want to list your phone number as the preferred method of contact if your agents are only available 9 to 5. Not only does thinking strategically about the right support channels for your conversations reduce customer effort, but it can also streamline your company's support and allow you to staff appropriately.

#### **Checklist**

Use this checklist to ask questions that keep your customer at the centre of your decision-making process.

#### Convenience:

- ☐ Where on your site can customers access support today?
- ☐ Where would you like them to be able to access support in the future?
- ☐ Do customers have the option to look for answers themselves?
- ☐ Is there a way to reach a human for live, fast help?
- ☐ With your current solution, are you able to recognise a customer and their support history if they contact you on two different channels?

#### Complexity:

- ☐ How much of your volume requires troubleshooting and to-and-fro interaction with agents?
- ☐ How much of this volume is time sensitive?
- ☐ Are there questions that could be automated or handled by self-service?

#### Context:

- ☐ Who are your primary customers how old are they and where do they live?
- ☐ How does this affect your channel offerings?
- ☐ What types of issues or questions do customers most frequently have?
- ☐ Are there questions that could be automated or handled by self-service?
- ☐ Is there a way to receive immediate, real-time help from a person?
- ☐ Can customers access support channels from your mobile site or app?

#### Cost:

- ☐ Are you offering the easiest and most efficient channels for customers?
- ☐ Would opening a more costly channel potentially reduce the volume on other channels?
- □ Would a more costly channel lead to higher customer satisfaction?
- ☐ Could you offset the cost of a new channel by embedding or increasing self-service options, or automating the answers to easy questions?

The right channel mix for your customers and business is one that will help optimise your operations, not weigh them down. You'll be able to have fast, personalised and more natural conversations with your customers by guiding them to the right channel for their problem.

The Zendesk Support Suite enables you to have natural conversations with your customers wherever they are. Channels are connected so that conversations are seamless, agents are more productive and you can collect valuable customer information to share across your company. When you start by determining how to have natural conversations with your customers that don't expose them to the complexities of your business, customers can solve their problems with the least amount of effort and you can provide a great support experience on any channel.

To learn more about the Support Suite, get in touch.

