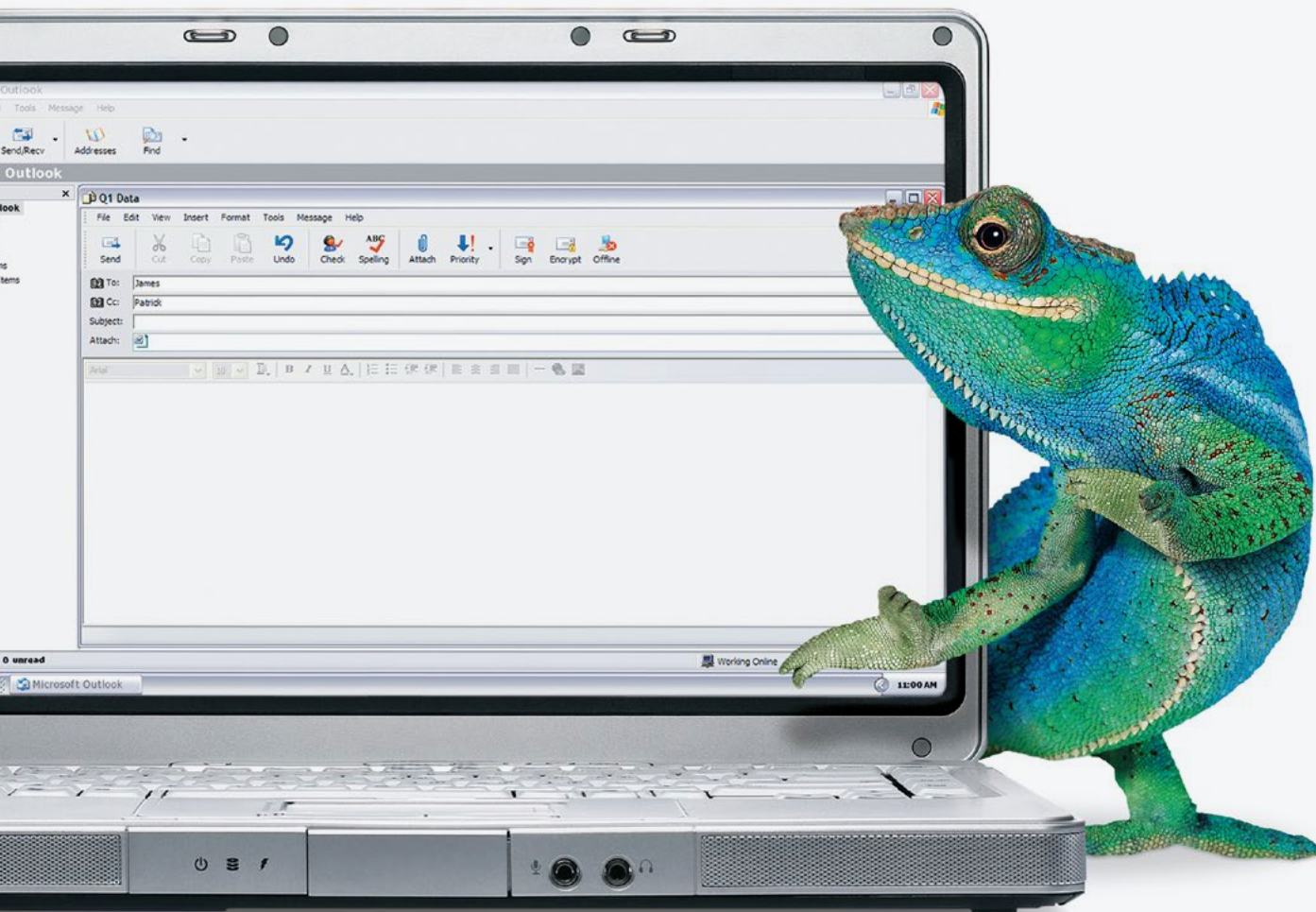


The workhorse of the contact center:
Optimizing email for the
modern customer
service environment



The workhorse of the contact center:

Optimizing email for the modern customer service environment

There's a lot of talk in the world of customer care about the multi-channel experience, and even more discussion around emerging channels like social media, chat, video chat, SMS and others. But over the last several years, two of our biggest accounts (fast-growing tech companies with an extremely tech-savvy, young user base) have exploded with growth. One of the programs grew from 35 team members to more than 2,000 in just over a year. The other enjoyed similar sustained growth over the last four years.

Besides exponential growth and market-leading success, there was another common theme between them. Both programs have a large email customer support component.

In today's customer experience environment, service leaders are constantly trying to determine the optimal channel mix. Channels like chat, social and self-service have garnered an increasing amount of attention, and adoption of them has indeed increased. However, according to recent survey data and feedback from leaders representing some of the world's top brands, email is still considered a highly effective channel for customer service - a contact center workhorse that shouldn't be overlooked.

In fact, email is absolutely the go-to support channel in many countries, because it's the only channel accessible by everyone, and on every device. It can also be a very personal and highly cost-effective approach.

According to Microsoft's 2016 Global State of Multichannel Customer Service Report, email ranks as the channel that consumers most typically use for customer service issues (see Figure 1), and its use is growing in many cases. When consumers want to lodge a complaint, email is

the preferred channel over both phone and social media.

The bottom line is that the "hyped" service channels still have a long way to go in the eyes of consumers. From a corporate perspective, data shows that organizations still recognize - and utilize - email as a key customer experience touch point, and many are using it more and more. Call Centre Helper found that 26 percent of contact centers rank email as their fastest growing form of communication, and as the most-used first channel of support communication for customers.¹

Despite its popularity, companies and service leaders need to change and adapt the way they use email for the modern service environment. Service teams must cope with consumers who expect issues to be addressed more quickly than ever. Failure to do so comes at a steep price,



As more communication channels for customer service interactions become available and adopted, it is more important than ever to satisfy customers' expectations for pain-free service.

Kate Leggett, Principal Analyst, Forrester

Generations are changing channels

What channels do you typically use for customer service?

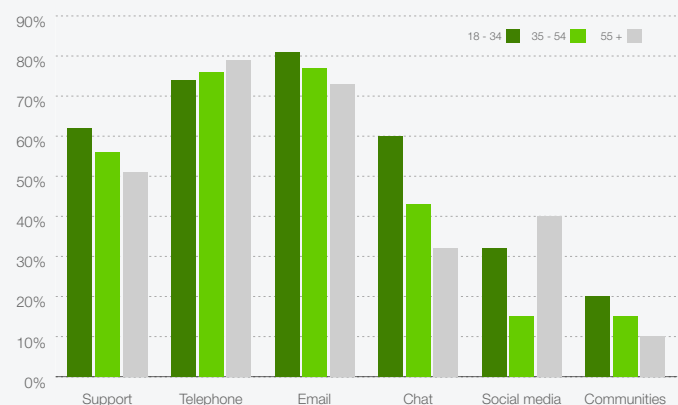


Figure 1 - Email ranks as the number one channel used by consumers under the age of 55 for customer service issues. Source: Microsoft 2016 Global State of Multichannel Customer Service Report

¹ Call Center Helper, White Paper: [What Contact Centres Are Doing Right Now](#), 2015

as customers have cited “Slow response to inquiries or complaints” as the number one customer experience issue that caused them to stop doing business with a company.²

In this paper, we’ll discuss the key areas of email optimization for the modern customer experience environment. By analyzing the role email plays in today’s customer support, along with perspectives and operational tips from service leaders, organizations can formulate more effective email strategies to upgrade their customer experience.

Based on our research, interviews with industry experts and analysts, as well as first-hand experience with our clients, email is likely to remain the workhorse of the contact center for some years to come.

“Email has become the minimum expectation customers have for support. Customers expect a response that is both quick and easily attained. The channels your customers will use to contact you must satisfy both of these expectations.

Marcie Murray, Director of Customer Support, Shopify

Eight ways to optimize email customer support

1. Mobility

While social media and messaging services are increasingly popular, email is still the only form of communication people access on every type of device (PC, smartphone, and tablet). Globally, at least 20 percent of all customer service interactions are now initiated by consumers on a mobile or tablet device (see Figure 2). Moreover, 81 percent of consumers aged 18-34 say they have a more favorable view of brands whose service is mobile-friendly.³

Service teams should keep in mind that the lines between emailing, chatting and social media usage are becoming blurred with regards to how people use their mobile devices. Rather than typing a lengthy response on a keyboard, consumers now send rapid-fire “chat-style” emails and in many instances expect a correspondingly quick email response.

According to e-marketing firm Constant Contact, organizations that provide effective email support through mobile devices focus on the following areas:⁴

- **Responsiveness** - Any support emails should be tested for responsiveness across all devices and screen sizes. Utilize tools like Litmus, a web-based email testing and analytics platform, to validate all support email templates.

Onscreen service is increasingly mobile

36% of customers ages 18–34 now begin their online customer service interaction on a mobile device compared to 21% of ages 55+.

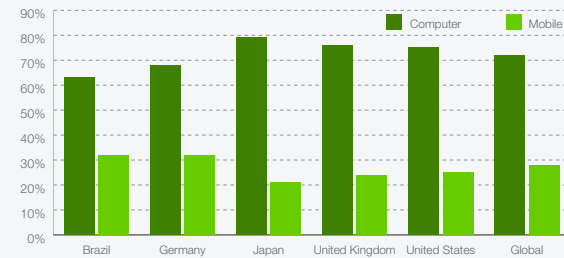


Figure 2 - A minimum of 20 percent of all global customer service interactions are now initiated using a mobile device. Source: Microsoft 2016 Global State of Multichannel Customer Service Report

- **Column formatting** - When designing support email templates, a single-column design is best for mobile viewing. Single-column ensures emails are easy to read and scroll through on mobile devices.
- **Image size** - Too many images or large file sizes will clutter the mobile experience and increase download times. Support email templates should contain three images at most, with header images of no more than 600 pixels, and content images of no more than 220.
- **Text and font** - Font and text size should be easy to read on any smartphone or tablet. Headlines should be 22pt font, and 12pt for body content. Fonts should be one of the pre-installed, web-safe varieties (Arial, Veranda, etc.), with no more than two different fonts per email.
- **Link formatting** - Keep in mind that any links embedded in an email will have to be tapped by the customer’s finger. Avoid “stacking” links on top of one another so users don’t inadvertently click the wrong link. If multiple links are required, make sure the most important or relevant one is placed first in the email.

“Mobile devices have positively impacted the ability for customers to contact us from anywhere at any time.

Jason Nagle, Head of Strategic Operations and Programs at Google Cloud

² Microsoft, [Global State of Multichannel Customer Service Report, 2016](#)

³ Northridge Group, [State of Customer Service Experience, 2015](#)

⁴ Constant Contact, [Frequently Asked Questions, 2016](#)

2. Personalization

Compared to phone, chat, mobile and social customer service, email is the most-used service channel globally. Consumers in Japan, Brazil and Great Britain all use email the most, while American consumers rate it only slightly behind the telephone.⁵ Thanks to globalization, organizations are now providing services and support to customers across the globe. However, they must still find ways to cater to each individual in the personalized way that customers have come to expect.

Customers don't just want an automated response within minutes of logging an issue, but also a personalized one. Based on our research and insights from customer service experts, here are some best practices for effectively personalizing email:

- **Be human** - Emails should be friendly in nature—not scripted and robotic. Customers want the convenience of email but still expect a human element. Agents should utilize email templates, but should also add a personal touch so that the customer knows there is a real person on the other end.
- **Acknowledge the problem** - Make sure the customer knows the agent understands the issue right from the start. Summarize the problem so that everyone is on the same page, and make sure all agents are trained to quickly communicate potential solutions.
- **Offer solutions** - Beyond simply acknowledging the issue, offer a solution right away. If possible, offer two or three solutions so that the customer has a choice and feels empowered. Try to solve both the customers' stated - and unstated - needs in one resolution.
- **Be concise** - Present information in the email so that the name, contact information, transaction details and summary of the issue don't take too much time to read.
- **Leave the door open** - Let the customer know they have the option to continue the conversation. Avoid simply resolving the issue or concern and then sending a "goodbye" email. Rather, let the customer know that there is always someone available for anything else they may need.

“ Email allows us to personalize and customize our thoughtful responses to customers, which improves the customer experience. We encourage our team to use the customer's name, as well as similar words and writing styles, so that we create a sense of camaraderie, while remaining professional. For example, one time a customer sent their concern as a poem, and we replied with a poem, creating a memorable customer experience [see Figure 3].

Herbert Fuhlrott, VP of Customer Relations,
TELUS International

Customer Relations, TELUS International

Excerpt from a recent “poetic” customer email:

Hi Kevin and the [CUSTOMER] team,
Thanks for your quick reply,
I've checked right through my emails,
I hope that this will fly.
...Well let me know if you require,
Any extra bits and bobs,
Otherwise I'll thank you,
You're doing such great jobs!

Excerpts from the TELUS International response:

As you are still in warranty,
you should not give but one worry.
[We] will take good care of you
Your steps again will count soon, too
In order to proceed,
Here's
what we will need:
Full name
Shipping address
Postal code
Phone number
...We look forward to your reply,
And on [us] you can rely.

Figure 3 - A wearables customer sent an email to customer service written in poetic verse. The TELUS International team provided a personalized response that mirrored a similar writing style to create a memorable support experience.

“ We don't want to sound like a robot. We want to talk to our customers like they're our friends, but also keep it professional at the same time.

Andre Narcesse, Customer Service Manager,
Zappos

3. Automation

Setting up automated email responses and workflows can help point customers in the right direction, and provide substantial time savings for agents. According to Len Markidan at Groove helpdesk software, a simple rule of thumb for increasing efficiency without sacrificing customer experience is to “automate processes, but not relationships.”⁶

Overall, organizations should focus their automation efforts on event-based, proactive emails. These initial, automated responses can be short, conversational and designed to solve simple issues before customers reach a member of the support team. First Contact Resolution (FCR) is often the most important email support KPI, and best-in-class service organizations are currently producing an FCR rate of 80-90 percent.

Companies formulating their approach to automating email for customer service should consider the following best practices:

- **Common reply templates** - Companies that deal frequently with product returns, for example, should have an easily accessible template containing instructions on how to return an item along with the return policy. This will give agents time to add a bit of personalization (and personality) instead of manually typing out each step in the return process.
- **Process rules** - Rather than having agents manually sift through and route individual emails to the right person for providing support, set up automated routing rules that generate a high probability of sending it to the proper agent. Some companies even use text analytics to spot long-term email trends and use keywords in conjunction with routing rules.
- **Intelligent inputs** - Some email systems now have the option to automate responses using artificial intelligence based on the initial inquiry. Beyond an initial touch, these intelligent inputs can be effective in resolving simple service issues with a single, automated response. Work with your email provider to see what options are available at the enterprise level, and monitor progress of machine learning in this area.



First Contact Resolution (FCR) is often the most important email support KPI, and best-in-class service organizations are currently producing an FCR rate of 80-90 percent.

“ There are some benefits for simple fixes where an auto response designed well with intelligent inputs can be as effective as a direct engagement with a human. The advent of more predictive insight from machine learning tools and systems will continue to evolve this space with far more targeted content in auto responses.

Jason Nagle, Head of Strategic Operations and Programs
at Google Cloud

4. Emotional connection

A negative attitude can affect service delivery, but email can serve as an effective means of defusing emotionally tense situations. Email provides the unique opportunity to take the time required to cool off before responding in a particularly heated encounter. In many circumstances, email can even be used proactively to take control of difficult situations in ways that other channels cannot.

Microsoft has found that the vast majority of customers believe that bad service results primarily from the company simply not caring about providing a good service experience.⁸ Given this perception, there are a number of strategies that organizations can use when writing emails that give people the feeling that they do matter, even in a difficult situation.

Write in an empathetic tone that acknowledges any perceived lack of service. The first few sentences should be sympathetic and carry a message similar to: “We understand you’re upset. We apologize and we’re going to fix it.”

Next, provide a list of potential solutions. This offers the customer time to read through the possibilities and make a rational decision, rather than getting into a heated discussion.

While it’s a best practice to encourage agents to interject some personality into emails, encourage them to tone it down during difficult situations. The response should be laser-focused on providing solutions, and positioned to convey a sense of urgency on the company’s behalf.

“ With customers who are unhappy, if you make a phone call, it opens the floodgates for the customer to rant. By sending an email, you can sympathize with the customer, explain the facts, reassure them and take the emotion out of the scenario.

Catherine McLynsky, CRM Professional Services Manager,
Sage Corporation

⁶ Len Markidan, [How to Save 600 Hours Every Year on Customer Service](#), 2015

⁷ Northridge Group, [State of Customer Service Experience](#), 2015

⁸ Microsoft, [Global State of Multichannel Customer Service Report](#), 2016

5. Timeliness

Customers say that the two most important factors in a satisfying customer support experience are getting their issue resolved quickly, and on first contact (see Figure 4).⁹ Email, when used properly, can be a uniquely effective tool in achieving both.

When evaluating how email can be used to resolve issues quickly and efficiently, optimizing the following customer service KPIs can drive positive results:

- **Time to Respond** - This is defined as the time from when a customer sends their inquiry to when they receive an initial response. It will vary depending upon industry, but according to experts, the minimum acceptable response time for email is between four and six hours. Anything over 24 simply isn't acceptable for today's customer, and automated responses within minutes is becoming commonplace.
- **First Contact Resolution (FCR)** - Service teams can fail in this area when they overlook issues in a customer's initial inquiry. They then have to follow up with probing questions in subsequent emails.

One of the secrets to excellent FCR numbers is having well-trained, knowledgeable and experienced agents who solve the initial problem and anticipate common follow-up issues at the same time.

- **Agent Handle Time (AHT)** - For email, this means the average time an agent spends working on the issue before escalating to another agent or closing out the ticket. Of course, more complex service issues will typically result in longer handle times. The key to keeping handle times to a minimum is having experienced agents that know the shortest route to resolution. Training is key!
- **Next Issue Avoidance (NIA)** - While solving the first issue is the initial goal, it's also important to consider the entire customer journey and what service issues are likely to arise next. Improving NIA metrics via email may result in longer agent handle times (and potentially decrease FCR), but contact centers should keep their eyes on the prize in terms of overall customer satisfaction.

What do you feel is the most important aspect of a satisfying customer service experience?

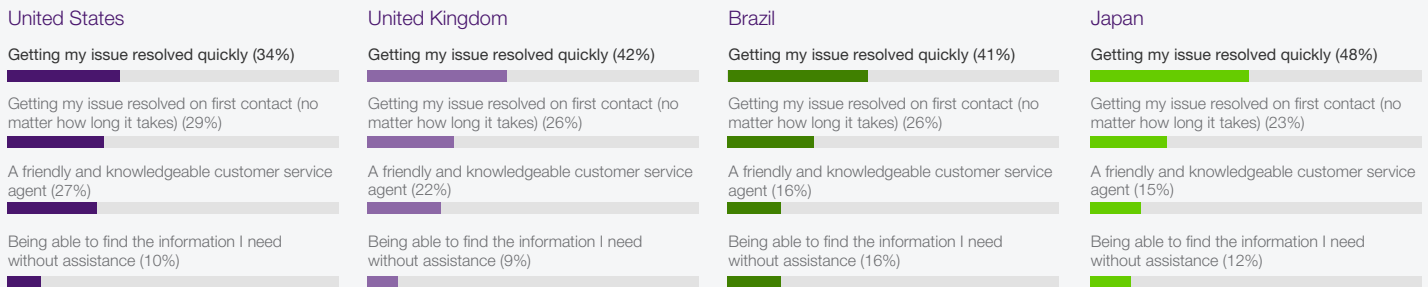


Figure 4 - Customers worldwide say that the two most important factors in a satisfying customer support experience is getting their issue resolved quickly, and on first contact.

Source: Microsoft's 2016 Global State of Multichannel Customer Service Report

“ You need to be monitoring SLAs in real time, and see when there's an urgent need to intervene. Get those emails addressed quickly.

Kate Leggett, Principal Analyst, Forrester

Follow through on any promises you make in the email, and don't let the communication with a customer continue over a few days. The longer it takes to resolve the customer's issue, the more you're hurting your relationship with the customer, even if the outcome is positive.

Marcie Murray, Director of Customer Support, Shopify

Since it's not a real-time channel like voice or chat, resolution isn't necessarily immediate, but that doesn't mean the service level will be lower. Agents have the opportunity to do more research, confirm their assumptions, and make a better effort to connect with customers through a well-constructed email reply.

Herbert Fuhlrott, VP of Customer Relations, TELUS International

Email is especially good for customers who are busy. Once they're able to get back to their email, they know that the issue is taken care of. The goal is a one-contact resolution.

Andre Narcesse, Customer Service Manager, Zappos

⁹ Benchmark Portal, [Sample World Wide Industry Benchmark Report, 2015](#)

6. Historical data

Email correspondence works to provide a clear record of past communications with a customer, and that record can be easily referenced by agents in the future. When agents have a deep level of detail, they can place more context behind the current issue and solve it more accurately.

Data contained in support emails can also be used to gain a better understanding of customers. Organizations are employing the use of text analytics to leverage historical support email data to further improve customer experience and gain a competitive advantage in the following areas:

- **Customer retention** - It is becoming key for service quality assurance (QA) programs to use text analytics in order to identify areas to improve customer retention. Unstructured metadata in support emails can be sorted and analyzed to better understand the

root cause of customer attrition and churn.

- **Sales opportunities** - Depending on the nature of an organization, text analytics can be used to determine potential trends for sales opportunities based on what customers are saying in support email conversations.
- **Competitive analysis** - Text analytics are now being used for competitive analysis, to aggregate and analyze data regarding how often other competing companies and products are being mentioned in support emails.
- **Key messaging** - Some organizations are using text analytics to understand the nature of any messaging that's garnering positive feedback from customers, in order to harness it for future use.



Transform your data into customer experience opportunities. [Learn more about using speech and text analytics in the contact center.](#)

“Text analytics allows you to see how often your customers mention your competitors and to harness any positive messaging your agents use for future training purposes.

Marcie Murray, Director of Customer Support, Shopify

“Having a track of emails out and back is a valuable resource as you get the 'feel' of the conversations from both sides and can see what has/hasn't been done.

Catherine McLynsky, CRM Professional Services Manager, Sage Corporation

7. Branding

Most companies incorporate branding into their service emails in some form to improve the customer experience and positively affect retention. Organizations are slowly blurring the lines between customer-facing functions of service, sales and marketing, with customer service acting as a touch point that impacts all other areas.

But it's important to treat service emails differently than typical marketing emails. Here are some best practices to effectively brand customer service emails:

“Too much branding can be a little distracting. You definitely want to have your brand in there, but you don't want to overdress that email and take away from any solutions or the service we provide.

Andre Narcesse, Customer Service Manager, Zappos

- **Consistency** - Branding among all agents' emails should be consistent. Specific agent qualifications and job titles should be left off emails in order to maintain consistency with each customer interaction.
- **Contact information** - Email footers or signatures should invite customers to reach the support team during the hours of operation. Signatures should be fairly simple, containing a link to the company website and one or two social media buttons.
- **Stylistic integrity** - The brand needs to come through in every support email, so ensure that templates align with the voice, style guidelines and overall marketing language of the company.
- **Personalization** - Make sure that, while complying with the corporate style policy, email templates give agents the opportunity to add a personal touch. The most important part of any support email is to personalize is the opening.
- **Simplicity** - Avoid embedded images, as they're not always easy to view on all devices and may increase load times. Minimizing imagery also allows customers to focus more on wording, and makes it easier to communicate the simple (but powerful) message that you're going to take care of any and all needs.

8. Cost-efficiency

Email is one of the most effective and cost-efficient customer support channels. Email has a much lower overhead than other channels, thanks to the possibility of a large automation infrastructure and the use of effective templates to decrease handle time. Recent data indicates a 13 percent greater FCR yield for email versus chat (see Figure 5).¹⁰

Outsourcing non-voice support channels, such as email, chat and/or social media customer care can also be much easier than outsourcing voice support channels, since things like accents and telephony quality are of less importance.

First contact resolution

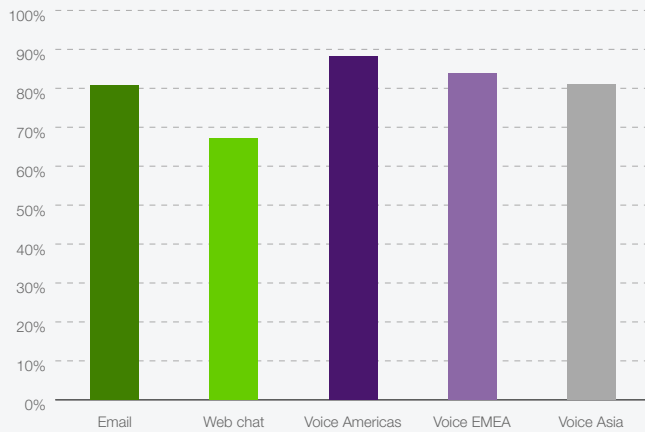


Figure 5 - First Contact Resolution (FCR) results are 13 percent greater for email versus chat.

Source: Contact Center Industry Benchmark Report, 2015.

Conclusion and recommendations

Given the fluid nature of technology and customer expectations, organizations should look for the following opportunities to maximize what email can do for them operationally:

- Audit email templates and design for mobile optimization. As consumers continually adopt smartphone and tablet devices, email appearance on these different screens has become a crucial part of the customer journey. A poor user experience when viewing support emails will likely hurt brand reputation and customer loyalty.
- Find smart ways to use automation. The challenge in today's world is not simply to automate, but to do so in ways that maintain personalization and enhance experience. Monitor intelligent technologies in addition to routing and workflows.
- Track KPIs like First Contact Resolution and Average Handle Time, and compare them with other service channels being used. With adequate training and experience, agents can often use email to improve those and other key metrics by responding to issues with a single email instead of a lengthy phone call or chat session.
- Customer service emails contain a large amount of unstructured data about customers. It's wise to use tools like text analytics to evaluate how customers feel about their experience.
- Branding in customer service emails should be simple but should also communicate the "voice" of the brand in congruence with every other step in the customer's journey. Minimize the use of images to allow the customer to focus on the solution the agent is providing.
- Emotionally charged situations can often be diffused with an effective email. Keep it professional, focus on potential solutions, give the customer options and try to anticipate potential follow-up issues.

- Email is extremely cost-effective compared to other channels, and much-hyped channels like chat and social have a ways to go in that regard. The key is to have well-trained agents and a smart automation infrastructure.



Email has become the minimum expectation customers have for support. Our world craves instant acknowledgement, and there isn't a perfect recipe to understand when a customer is willing to wait.

Marcie Murray, Director of Customer Support, Shopify

In our experience, having a highly engaged and well-trained workforce is the first step toward success in any customer support program. But our success in delivering world-class email programs has depended on integrating a huge set of learnings and best practices like the ones mentioned in this paper. If you are interested in discussing how to launch or improve your email support program, please reach out to our team of experts at <https://www.telusinternational.com/contact>.

¹⁰ The Economist Intelligence Unit, [Creating a Seamless Customer Experience](#), 2014

TELUS International is a global BPO and ITO company with service delivery centers around the world, including in Canada, the United States, Central America, Europe and Asia. TELUS International is the global arm of TELUS, one of Canada's largest telecom companies serving almost 13 million subscriber connections.

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