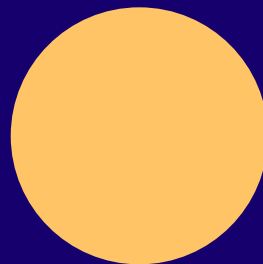


# Your Must-Have Checklist for Customer Service Efficiency in 2021

A step-by-step guide for customer support managers to optimize their strategy — while cutting costs



# Breaking down CX optimization

It seems like the buzzword of 2020 was “optimization.”

Although optimization sounds good on paper; what does it really mean in the world of Customer Support and how can CS professionals become more efficient in 2021?

Considering turning advice into action can feel like an insurmountable task, we’ve developed this checklist to help break down the complex challenges that customer service organizations face into manageable action items.

We understand a one-size-fits-all approach might not work for your specific scenario, since each organization’s customer team is different by design and purpose you may need to adjust this checklist for your company’s specific goals and KPIs. Nevertheless, these are the kinds of questions you should ask yourself when planning your customer service operations optimization strategy.



# 1 Setting the stage: Goals and KPIs

You may be rolling your eyes right now thinking that the goals of customer service teams are obvious. But there's a reason why this initial exercise is so critical: it's the easiest way to ensure you're working toward the same objectives, and that you prioritize what to spend more time and effort on throughout the year.



Here are some of the most important questions you need to answer:

What does your company want to achieve in the next **three, six** and **nine** months?

3 months

6 months

9 months

How can your customer service team impact this goal directly?

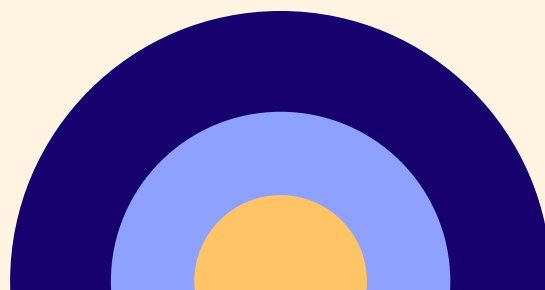
Where and how will you keep track of these goals and metrics?

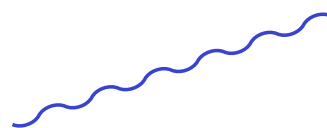
Once you write down your goals, connect them to the KPIs you'll measure to ensure success.

## Pick and choose the most relevant CS metrics for your business, or add other metrics you need to keep track of:

|                                     | Industry Standard         |
|-------------------------------------|---------------------------|
| First Response Time (FRT)           | 24 hours for email        |
| Average Handling Time (AHT)         | 6 minutes and 3 seconds   |
| Net Promoter score (NPS)            | > 10 is considered "Good" |
| Customer Effort Score (CES)         | Avg. between 70% and 90%  |
| Customer Satisfaction Scores (CSAT) | ~74.4%                    |
|                                     |                           |
|                                     |                           |
|                                     |                           |

**Pro Tip:** Make your KPIs customer-centric. More than any other team inside your organization, customer service teams need to live and breathe customer centricity. Make sure your goals reflect that, and that you get buy-in from other teams and upper management.





# 2

## Different optimization strategies for different teams



### THE SWAT TEAM

Many businesses have a high-quality, well-trained internal customer service team. Some call this a “SWAT team.” This team should be **focused on handling the highest-priority and most complex cases** including angry customers or those with highly technical or specific needs.



### THE SCALE TEAM

The “Scale team” is usually an outsourced customer service team and can include offshore, nearshore, or onshore call centers. These teams are often managed by a BPO and handle the vast majority— 60 to 90% on average —of requests from customers. They focus on less urgent and less complex queries.



### THE AUTOMATION TEAM

The goal of automation is not to substitute CS agents. Rather, the “Automation team” is another piece of the puzzle, rerouting common requests so that agents can focus on more complex cases. Other forms of automation include self-service models, which nowadays can be integrated into virtual personal assistants like Siri or Alexa.

## Questions you need to answer:

Does your organization have a customer service SWAT team?

What are the key differences between SWAT agents, and the scale team?

Where are these teams located?

What type of queries can be rerouted through automated solutions?





# 3

## Optimization checklist for SWAT teams

### Explore “Tier 2” locations

Consider moving your team to “tier 2” cities like **Dublin, Amsterdam, or Salt Lake City**: these cities offer high-quality talent, but lower-cost labor.



### Turn them into beta testers

Have your SWAT team try new customer service technologies or cutting-edge strategies, before rolling anything out to other teams.



### Hire for passion and knowledge

Hire and promote agents who have an inherent knowledge and passion for your product. These two will easily show in agent and customer conversations and will end up delighting your customers.



#### Pro tip:

Alternatively, implement remote internal teams—offering employees flexibility while improving margins.



#### Pro tip:

Once you’ve evaluated results, have SWAT agents train other teams via work shadowing, instead of time-consuming and costly training sessions.



#### Pro tip:

If you plan on having your SWAT team deal with complex technical issues, consider diversifying your hiring by having engineers work directly with problem managers.

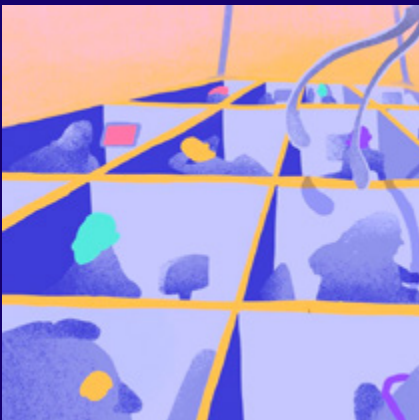


## Questions you need to answer:

What is the ideal profile of a SWAT team agent that aligns with your company culture?

Should upsells and resells be part of this team's objectives?

What technical skills do you need to round out this team?



Other Resources

**You might be hiring the wrong people for customer support. Here's why.**

The people you hire for your team need to be ready and fully equipped to tackle the challenges of customer support. But are you hiring the right people?

**Read Now**



# 4

## Optimization checklist for Scale teams

### Leverage machine translation

Multilingual customer service can dramatically improve customer experience KPIs, which is why outsourced customer service centers are often located in places like **Cairo, Lisbon, and Athens**. However, with the advent of machine translation, teams of any size in any location can provide multilingual coverage.

**Pro tip:**

When exploring BPOs, keep your mind open to customer service centers in places like the Philippines and India. These countries have massive English-language operations, and can now easily handle multilingual customer service using machine translation technology.

### Pick the right partner

If you are selecting a partner or reconsidering your current partner choice, we recommend partnering with tech-forward BPOs who have a strong perspective on the future of customer service.

**Pro tip:**

To pressure-test the relationship, ask them if they are willing to sacrifice their own short-term revenue in order to benefit your long-term outcomes.

### Consider going the DIY route

Some companies choose to build “scale” locations that remain owned and managed by the organization. This can be the perfect solution for big companies with technical product lines.

**Pro tip:**

If you can find the sweet spot between cost, local expertise, and hiring at scale, this may be your best option.

## Questions you need to answer:

Is it more cost-efficient for your business to hire and train at scale, or go with a BPO?

Which languages do your customers speak?

What frequently asked queries will this team solve? Can they be automated?



+



Other resources

### **Always-on Multilingual Customer Support**

Discover how Unbabel's AI-powered, human-refined translation solution, allows Concentrix to create multilingual hubs in low-cost, language-agnostic locations.

**Watch now**

# 5

## Nail down the escalation process



**Hierarchical escalation** happens when an agent can't answer a question and passes it on to someone higher up the food chain, such as a supervisor or manager.

Hierarchical escalation may also include interactions that begin with a chatbot who can't assist and then passes them to a human.

**Hierarchical Escalation**

**Functional Escalation**

**Agent**



**Functional escalation** is when an agent is unable to answer a question and transfers it to the appropriate team.

# No matter what type or combination of escalation process your organization uses, there are ways to improve them:

## Set clear expectations of response times

Lay out clear expectations around response times for agents. Don't forget, time expectation can vary per channel:



**Voice:** Most customers report three minutes being an acceptable time to wait in line



**Social media:** 80% of customers expect companies to respond to their posts within 24 hours



**Email:** Helpscout reports that **41 percent of customers expect a response within six hours**

## Build an escalation matrix with practical examples

Clearly lay out escalation procedures for common issues so that agents know when and how to reach out to a technical specialist or manager.

## Keep track of metrics like Escalation Rate

Make decisions about how to structure, incentivize, and improve teams based on hard data.

### Pro Tip:

Once you've set and clearly communicated deadlines, set up a reward system for agents with quicker responses. Implementing a leader board, or a simple kudos system can bring an element of gamification that makes employees more engaged while improving FRT.

# 6 Lean on AI

## Make teams language agnostic with machine translation

Machine translation enables any team anywhere to respond to customer requests, no matter what language they arrive in. It relies on artificial intelligence, ideally with humans in the loop, and boosts operational efficiency while also controlling costs.

**Put simply:** Multilingual support is a must-have for global companies, and machine translation is the only way to deliver at scale.

## Choose automation that impacts KPIs

Automation helps customers assist themselves with simple tasks such as resetting passwords, troubleshooting and addressing FAQs. It can also assist agents in resolving cases faster. For example, **multilingual AI agent** assistants can help the agent chat with customers in 30 languages. This can reduce the personnel required to translate and increase the likelihood of FCRs.

### Pro Tip:

Automation will free up your agents' time. Make sure they are able to maximize this time to respond to more cases. Or, use automation to give challenging cases the attention they need on first contact, helping to increase CSAT scores.



Other resources

## Investing in the future: Demystifying AI in Customer Service

After years of hype, Artificial Intelligence (AI) is getting real, and one of the top use cases is Customer Service. Discover how leveraging AI can help drive efficiencies, reduce team churn and delight customers.

[\*\*Read now\*\*](#)

# Optimizing for customer centricity

It's true that 2020 showed in stark relief how important optimization is for business.

However, for some, "optimization" means devaluing delightful customer experiences. The fact is, optimization makes your support faster and more effective, and that goes hand in hand with customer satisfaction.

**U.S. businesses alone lose an estimated \$62 billion (with a b!) every year due to poor customer experiences.** Fortunately, it doesn't need to be this way. Improving efficiency, while reducing costs, can ensure your business sees increased revenue and repeat business due to happy, loyal customers.

Ultimately, the goal of optimizing your customer service operations is to be a best-in-class brand that treats customers with empathy. This should result in measurable improvements to your bottom line and your customer satisfaction metrics.



At Unbabel, we believe language shouldn't stand in the way of relationships.

[Learn more](#) about how we can help you serve your customers in their native languages, with scalable support translation across digital channels.



**Unbabel** Support, translated.

