# Best practice for conversational customer service

zendesk

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# Messaging is the new paradigm for service

It's no secret that customers love messaging — more than [70%](#) of customers expect a conversational experience when they engage with companies.

While live chat brought the convenience of instant messaging to corporate websites and mobile apps, these chats had a finite end. Like talking on the phone, it was a real-time synchronous mode of communication.

The standard for conversational service has changed, and that's because customers now have higher expectations.

Today, customer support conversations have evolved to be both real-time and ongoing. With new technology and new channels, modern support conversations equip your organisation with powerful customer data points and context.

Conversational service is on the rise, with over 30% of companies having already implemented new channels like web, mobile and social messaging. That number is growing, with more than 40% of companies planning to add new channels this year.

# To get started with messaging, we've compiled a list of best practice and useful tips below.

Zendesk combines the innovation of modern channels like messaging with a powerful management tool for support teams.

## Connect with your customers whenever, wherever

Add messaging to your website, mobile apps and social channels. Conversations stay connected across any channel. It's easy for your customers to reach you on the channels they're already on.

## Deliver faster and more efficient service at scale

Use built-in AI and automation to deflect common questions, help customers self-serve 24/7 and collect important data for agents.

## Manage all conversations from a single workspace

Give agents all the tools and context they need to provide personalised service across every channel inside a unified agent workspace.

## Integrate any business system to create engaging experiences

Use our open and flexible platform to integrate any bot, app or external system for unique experiences that span the customer lifecycle.

## Key terms

| | |
|---|---|
| **Conversational service** | Modern customer service delivered across an ecosystem of messaging apps, web and mobile messaging, and customer service software – often with the help of automation |
| **Embedded messaging** | Conversational experiences embedded in a mobile app or on a website that allows customers to engage with support |
| **Social messaging** | Customer support over messaging apps like WhatsApp, WeChat or Instagram |
| **Live chat (chat)** | Real-time, session-based conversations akin to instant messaging, where the ticket is closed when the conversation terminates |
| **Asynchronous** | An ongoing communication style provided by messaging in which the conversation can start, stop or continue without sacrificing context or closing out a ticket |

# 01 Embed conversational support on your website and mobile app

It's important that your help centre is accessible to reduce friction and improve the customer experience.

## Take action:

- **Identify website hotspots:** If your customers are dwelling on certain pages of your website, or struggling to reach your support team, meet them where they are by making messaging available right then and there. Most users will look for a messaging widget in the lower right corner of a webpage, though some companies do offer the widget on the lower left.

- **Make help centres more interactive:** It's common for customers to engage in self-service before seeking out support. Give your customers the option to message you directly from your help centre. Bots can share relevant articles or hand the conversation off directly to an agent.

- **Don't forget your mobile app:** Including messaging within your mobile app can improve customer satisfaction because customers have access to help right when they need it – without having to search for your website separately. Keep them in the app and keep them in the process of what they were doing.

**PROBLEM**

"Our customers can't easily find how to reach us for assistance."

**SOLUTION**

Put messaging all over your web and mobile presence so customers can find you easily.

**OUTCOME**

- Increased Customer Satisfaction (CSAT)
- Lower Average Resolution Time

**Tip:** Embedding messaging in your mobile app reduces friction when customers try to get in touch with support. It also drives customer engagement, as customers will be less likely to exit the app to seek support elsewhere.

# Four Seasons uses conversational service to create convenient, personalised, luxury experiences for guests

FOUR SEASONS

## Challenge

Four Seasons needed to find a modern way to personalise their guest experience across 100+ hotels, but most guests did not visit their website again once a reservation had been booked in. Four Seasons sought to modernise the digital customer experience for guests across 100+ properties.

## Solution

They created a conversational concierge experience within the Four Seasons App, which was popular with their regular guests. Guests can engage with the concierge from any channel without sacrificing conversational context. On the back end, Four Seasons staff can manage these conversations from their custom-built unified workspace.

## Impact

Four Seasons saw improvements in their CSAT and NPS scores as well as a reduction in their response times for a better customer experience.

# 02

# Make it easy for your customers by providing support over their preferred channels

Focus on channels that cater to your region and the needs of your customer base. Businesses in North America would do well to offer customer support over Facebook Messenger, while in Europe it would make sense to offer the same service on WhatsApp.

If your brand has a huge presence on Instagram, allow your customers to slide into your DMs. On the back end, it goes to the same place.

Messaging is a great place to open the conversation, but it shouldn't be the only way your customers can get support. When messaging acts as a gateway to other channels, like email, talk or your knowledge base, it gives your customer agency to choose how they want to resolve their problem.

**Tip:** Leverage verification for credibility. Social messaging channels like Twitter, Facebook Messenger and Instagram allow companies to set up a verified business profile so customers know they're chatting with the real thing.

**PROBLEM**

"Our customers immediately escalate to social media when self-service and traditional channels don't garner a quick enough response."

**SOLUTION**

Make messaging easily available on the web, mobile apps and social channels — and anywhere they look for answers.

Selecting messaging apps that are relevant to your customers' region or industry can also increase your customer reach.

Treat messaging as a gateway to better service: always give your customers a choice of channels. This includes voice for urgent issues or email for lengthy, complex conversations.

**OUTCOME**

- Increased CSAT
- Increased First Contact Resolution (FCR) rate

# PayJoy saw their SLA drop dramatically with WhatsApp

> **"**
>
> Someone might text us and then immediately call us, and then get upset when we didn't have all of the context.
>
> Gib Lopez
> Co-founder and Chief Operations Officer at PayJoy

**PAYJOY**

## Challenge

PayJoy enables people around the world to access financial services on their mobile devices. Previously, their support system was a mix of disconnected channels, which negatively impacted agent productivity, customer satisfaction and their ability to scale internationally.

## Solution

PayJoy connected WhatsApp to Zendesk, allocating multiple agents to messaging and making it possible for them to respond to conversations in minutes, rather than hours or days.

## Impact

By handling easily satisfied requests via WhatsApp, Payjoy saw their service level agreement (SLA) drop from 24 hours to 1 minute, and cut down inbound calls by 60%.

# The conversational landscape

## The most popular messaging apps by region

The ecosystem of messaging apps is complex — most people use a combination of apps to stay in touch with each other. Popular messaging apps differ in every region and there is no one-size-fits-all method to business messaging. Researching the most popular apps in your region will help you provide the best, most thorough conversational customer support.

**Top messaging app by country**

● Facebook Messenger   ● WhatsApp   ● WeChat   ● Viber   ● LINE   ● KakaoTalk
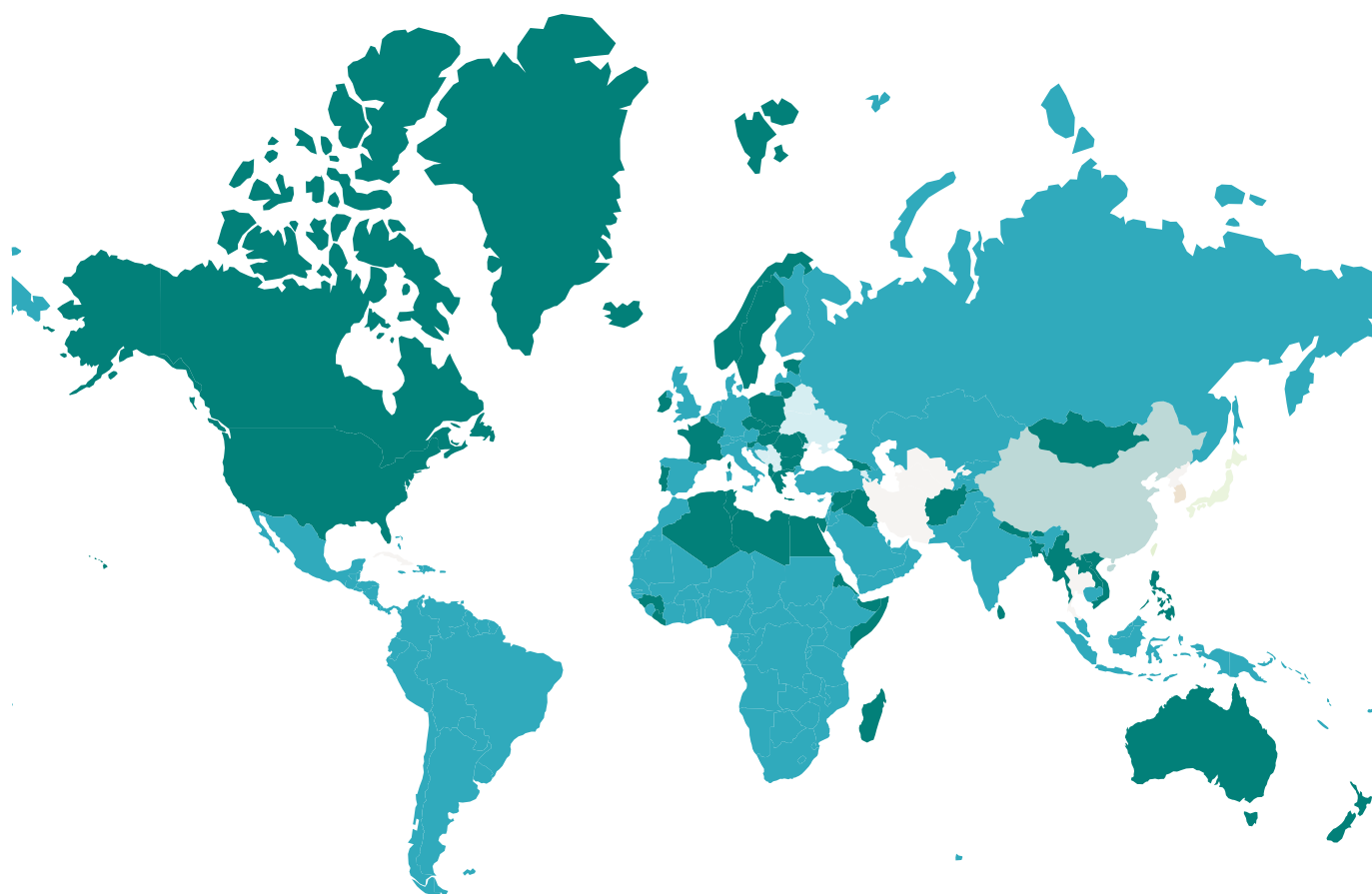
Source: SimilarWeb

# 03

# Reduce inbound volume with automation

Answer Bot provides out-of-the-box automation capabilities, like Article Recommendations and Flow Builder, a no-code tool for creating customised conversation paths.

**PROBLEM**

We are experiencing a spike in tickets and wasting time dealing with repetitive queries that have known solutions.

**SOLUTION**

Reduce inbound volume with out-of-the-box automation that can surface relevant help desk articles or allow customers to find their own answers. Of course, automation should also support hand-off to an agent when a human touch is needed.

**OUTCOME**

- Increased Customer Satisfaction ratings (CSAT)
- Decreased First Response Times (FRT)
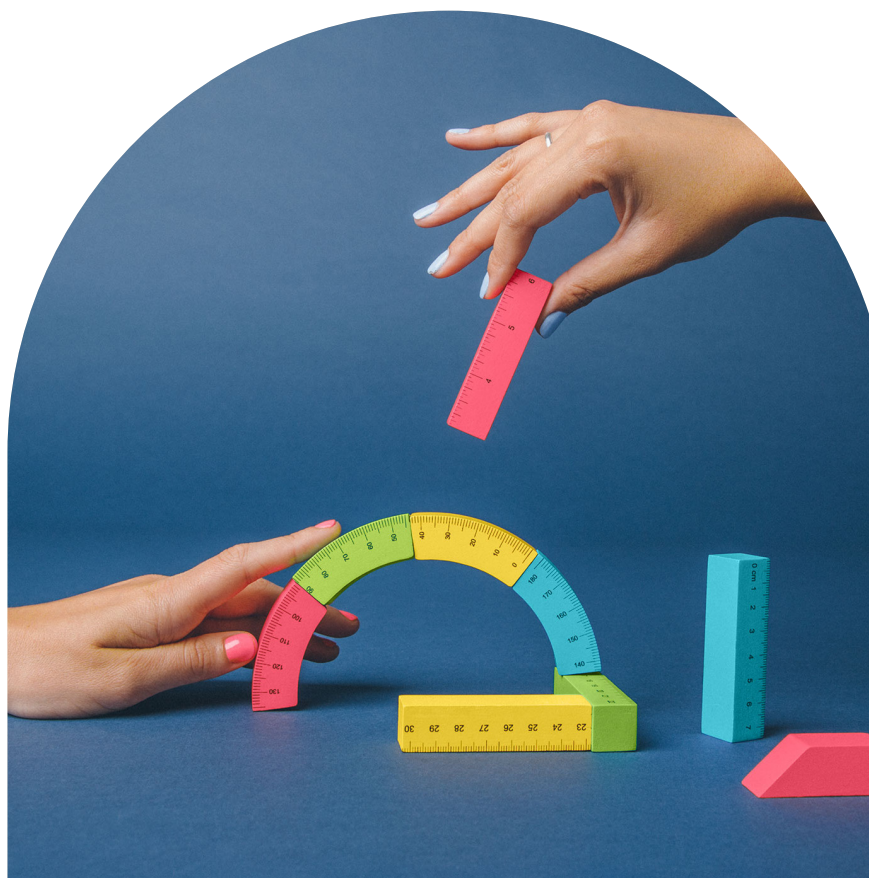
# Take action:

- **Leverage your help centre:** Answer Bot uses conversation cues to recommend knowledge base articles. If the recommendations don't help the customer resolve the issue on their own, it's best to hand the conversation off to an agent.

- **Build conversation flows to guide:** Customise Answer Bot by creating conversational flows without any coding. Guide customers to a resolution by automating FAQs or escalate the conversation to the right agent, if needed.

- **Set up business hours for agent availability:** If you don't offer 24-hour coverage with live agents, set up business hours to let customers know when agents will be available to respond to their questions. In the meantime, be sure to give customers the option to leave their questions for review when agents are back on duty.

- **Give your customer options:** Sometimes your customer just wants to speak to a real human, in the moment. When agents are available, make it obvious how they can transfer their conversation to a live agent.
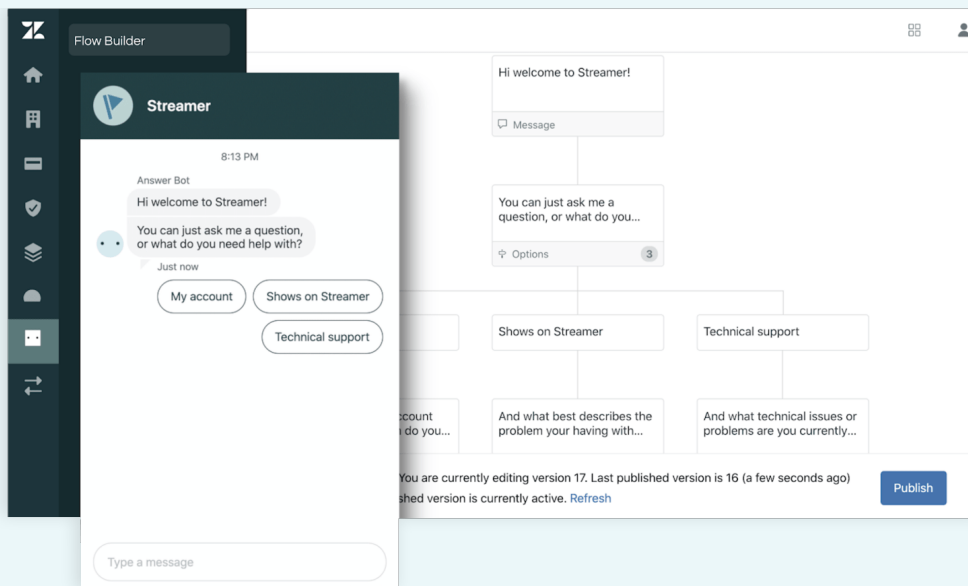
Answer Bot allows you to automate support over messaging, empowering support teams to offer 24/7 real-time support for customers and gather context before transferring the conversation to an agent.

# 04 Collect customer information to improve agent efficiency

## PROBLEM

"Our agents have no upfront insight into our customers' experience and it's slowing down our service."

## SOLUTION

Save time on manual data entry and collect information about the customer before they reach your agent. Knowing who your customer is and anticipating their query can reduce customer frustration because they're not forced to repeat themselves.

## OUTCOME

- Decreased Average Resolution Time
- Increased CSAT

## Take action:

- **Collect customer context upfront:** Flow Builder can capture important customer information, such as their name, contact info and details about their issue, with a form that can be completed before transferring to an agent or leaving a message. This can be extremely helpful for additional context and routing.

- **Add a CSAT survey to the conversation:** Customer feedback is crucial. Embedding a customer satisfaction survey in the conversation allows your business to understand your customers' pain points and where you can improve.

**Your Company**

Answer Bot

No problem! Please let us know how we can help.

Name

Mary Lamb

Email

mary@lambcare.net

Please provide us more details on how we can assist!

I can't find my lamb!

Nature of Issue

Customer Support

4 of 4     Send

Type a message

# 05 Manage all of your conversations from a single interface

With messages coming in from Instagram and WhatsApp in addition to your website and mobile app, your support system should be able to receive and process messages in a centralised, easy-to-use interface that all agents can access and work in.

**PROBLEM**
"Between email, chats and talk, we're having difficulty keeping track of our tickets."

**SOLUTION**
Make sure your help desk can receive messages from all your channels in one place. This will minimise training time for your agents and make it simpler to respond and track issues that come from any channel you choose to connect to.

**OUTCOME**
- Decreased Average Resolution Time
- Higher agent efficiency

# Take action:

- **Manage your channels in one place:** Provide agents with a unified workspace. Keeping all of your support channels in one unified agent workspace means agents can see previous interactions across other channels (such as email), and even behavioural data like purchase history (when integrated).

- **Don't forget the conversation history:** With Zendesk, you're able to see the entire conversation history, just like how you can scroll through the entire thread of messages from your dog walker on WhatsApp. Messaging allows both customers and agents to see the entire conversation history, including bot interactions. Use that to provide more personal support.
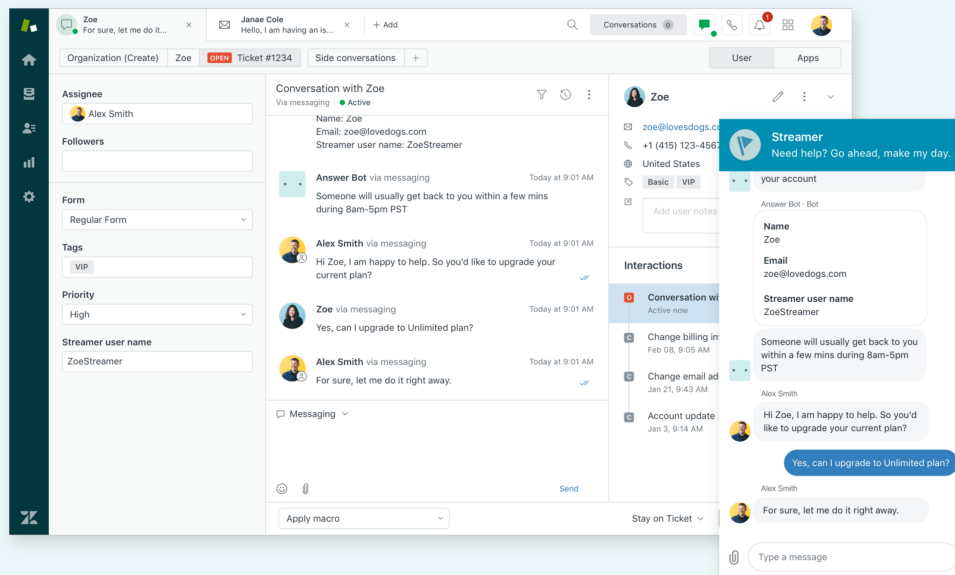


With the Agent Workspace, unify messaging channels alongside other support channels like email and phone in one place, allowing agents to multitask, follow up on the customer's preferred channel and keep everything together.

# WeRoad benefited from a unified workspace

## ⚖ Challenge

Italian travel company WeRoad was having trouble scaling their customer support on their Facebook messaging channels with decentralised numbers and multiple smartphones.

## 💡 Solution

WeRoad added WhatsApp into their support system so agents could respond to multiple conversations from one unified workplace.

## 🛍 Impact

WeRoad was able to simplify and scale their operations, switching from a cacophony of WhatsApp numbers to two: one dedicated to pre-sale questions and one dedicated to post-sale enquiries. This improved agent productivity by 15%, reduced support volume by 10%, and enabled the team to reply to 90% of WhatsApp messages within two hours.

# 06 Connect messaging to critical business systems

Zendesk's open and flexible platform allows businesses to add interactive elements to their messaging solution. This includes rich features like mobile payments, sophisticated automation and conversation extensions. Customers can select seats, update shopping carts, share media and do much, much more.

**PROBLEM**
"Our customer experience is disconnected, with customers logging in and out of different channels to perform multiple actions."

**SOLUTION**
Messaging has the potential to do more than just exchange text. Connecting to other business systems can open up doors to more interactive tools, such as the ability to make payments, book reservations and more for the ultimate customer experience.

**OUTCOME**
- Increased CSAT
- Better collaboration
- Safer customer data
- Increased sales

## Take action:

- **Keep your business software connected:** Integrate your customer service platform with your ecommerce system, booking system, sales CRM and marketing automation software so agents have a more complete view and customers can fill out forms, select seats or choose dates on a calendar without leaving the conversation.

- **Make it a group chat:** Engage customers and partners in group conversations, so agents, sellers, buyers, drivers and anyone in between have the information they need to solve the customer's problem faster.

- **Extend the customer relationship:** Whether you're sending reminders before, garnering feedback during or following up after the end of a conversation, messaging can help nurture the customer relationship beyond everyday customer support and empower customers to actively respond in kind.

# RedDoorz integrated its hotel management system with messaging

## Challenge

With more than 1,800 hotels across 100+ cities, RedDoorz is one of Southeast Asia's largest and fastest growing technology-driven hotel management and booking platforms. Agents used multiple applications to complete simple support tasks, created reports manually, and struggled to track performance and productivity due to a lack of comprehensive data.

## Solution

The company was able to integrate its back end hotel management system along with WhatsApp into Zendesk, giving agents much-needed visibility and boosting productivity.

## Results

- First Response Time down 86%

- 90 agents trained remotely to handle 50k monthly conversations

# 07 Use proactive messages to engage customers and increase sales

Messaging can be used for more than just support – for instance, customers often need help when they are in the process of researching, choosing and purchasing products.

When integrating conversational support with your e-commerce platforms, messaging becomes a sales-supporting service as well.

Consider how enabling messaging across your e-commerce platform could impact your revenue numbers, with agents empowered to cross-sell.

**Customers are 170% more likely to engage with a business in a conversation when a proactive message is sent**

Source: Ada

**PROBLEM**
"Our company misses opportunities to initiate conversations and create opportunities to cross-sell."

**SOLUTION**
Make it faster and easier for your customers to choose the right products or services during the purchase cycle with business-initiated outbound messaging. Messages can be targeted to customers returning to certain web pages, allowing you to stay on top of queries and keep the customer from churning.

**RESULTS**
• Increased revenue
• Increased customer engagement
• Fewer abandoned carts

# Take action:

- **Create new touchpoints:** Pop messaging on search results, product pages and in your app so you can be where the customer is. The customer journey is full of surprises – if you can anticipate where your customers will be, be there for them.

- **Identify hotspots:** Use web analytics tools to identify where customers tend to dwell on your website and reach out proactively to offer help. People tend to spend a lot of time on high-value product items, on their cart and within the check-out funnel. Sometimes all you need to make a sale is a little human touch.

- **Close more sales:** Recommend products and embed payments into the messaging conversation to facilitate purchases.

- **Bring buyers back:** Promote deals and products with proactive marketing updates to build loyalty and encourage customers to try something new.
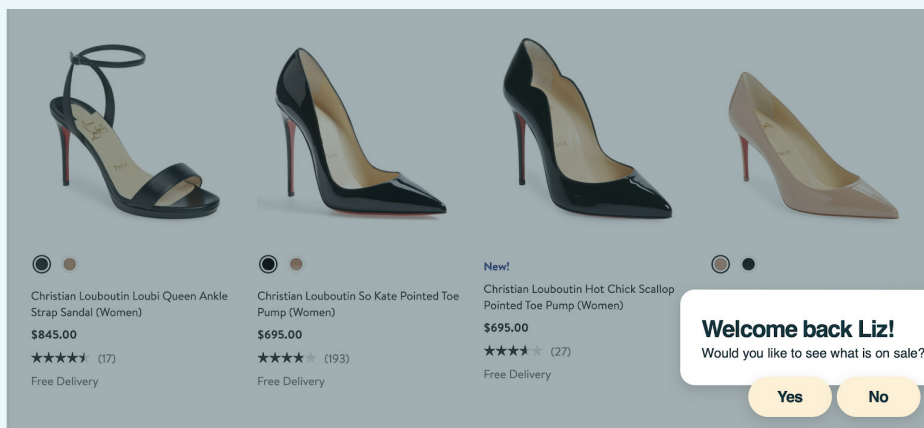


With Zendesk, you can embed messaging on your checkout page and proactively engage with customers based on activity, or engage with repeat customers by promoting new deals and products.

# 08

# Optimise your messaging and channel strategy based on metrics reporting

**PROBLEM**

"I need to know if my investment in messaging is really improving our service results."

**SOLUTION**

Built-in reports can be used to keep track of key metrics and help you determine if you need to make any adjustments to your list of channels, your staffing needs or your overall operational strategy.

**OUTCOME**

- Improved efficiency
- Increased volume without additional investment
- Insights into your customer experience
- Metrics to measure your team's performance

## Take action:

- **Measure impact and staffing with analytics:** Familiarise yourself with some of the key metrics that are used to measure messaging impact. From your overall messaging ticket volumes to your first contact resolution rates, know which ones are most critical to help you scale up your operations and which ones will have the most impact on your company.

  Remember that for some metrics, such as volume, high numbers might not be a bad thing, especially if your resolution rates are also high. These metrics also go towards improving overall customer experience with metrics like CSAT, resolution rate and time to resolution.

  Further, they will help with estimating staffing and understanding agent performance, allowing you to identify gaps where further agent training is needed.
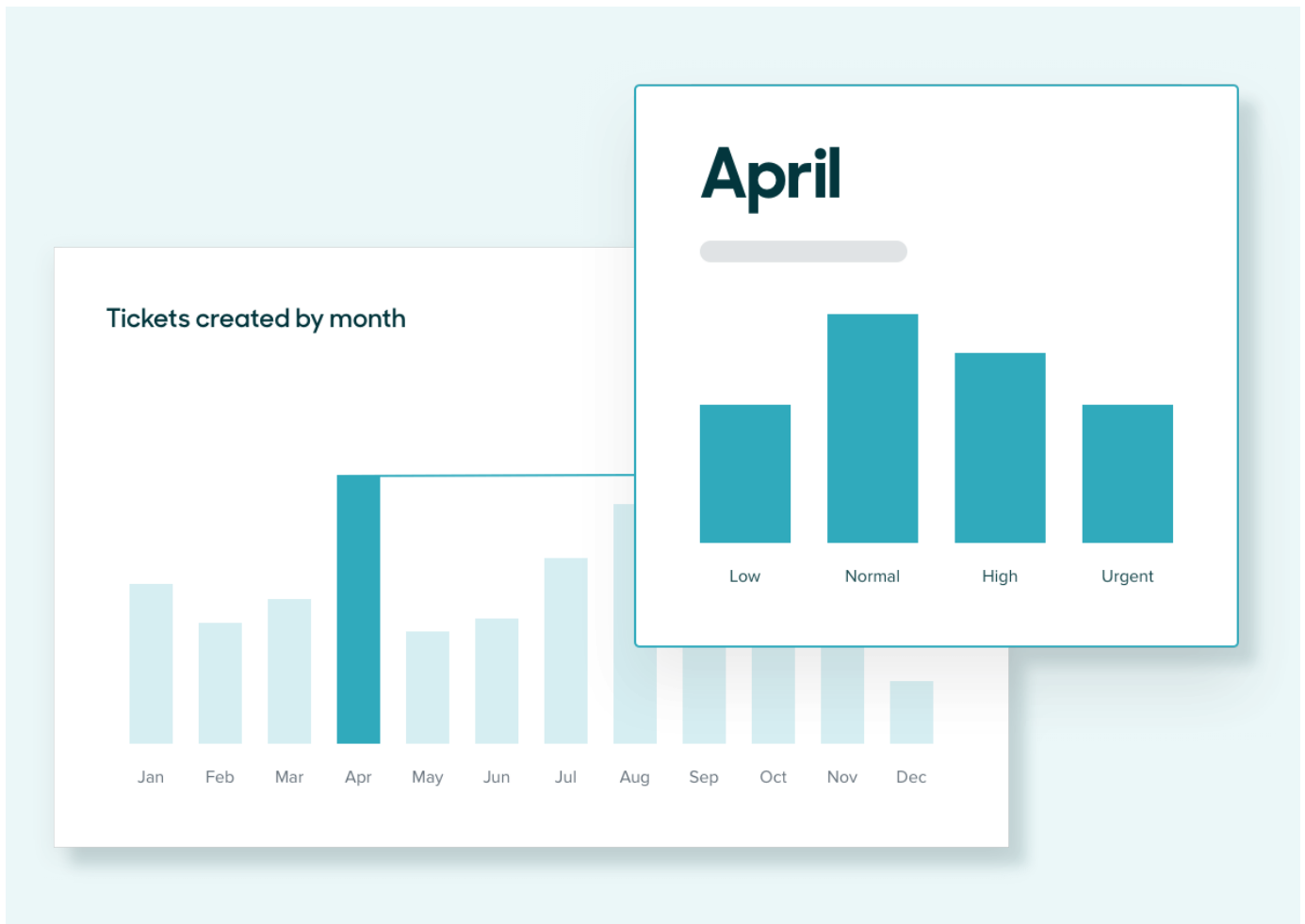
## Take action:

- **Measure impact by channel:** Wherever possible, determine which channels are most popular with your customers. This can be used to work out if more or less channels would be beneficial to your business and your customers.

- **Compare metrics with non-messaging channels:** A key reason for moving to messaging is to reduce the use of other more costly channels, such as voice. Reductions to these other channels can be beneficial to your business, as well as free up funds to invest further in customer support.

# 09

# Prepare your staffing strategy for a messaging-first world

Staffing your support team for messaging will require education and training. Because messaging is both real-time and ongoing, your team will need to understand how to work with this new channel.

Concurrency, which is the number of conversations an agent can handle at once, is different between live chat and messaging. While a best practice for live chat might be to limit the number of active conversations per agent to three at a time, the ongoing capabilities of messaging can allow for more.

In a unified workspace, agents can manage conversations from messaging channels alongside tickets from email. If tickets spike in certain channels or at certain times, consider allocating more staff to certain channels. Automation in messaging can help deflect FAQs and capture important information and context to allow your agents to better aid customers.

## Take action:

- **Calculate the number of agents:** Each organisation has its own set of support requirements and will have different staffing needs. Your agents' experience, the complexity of your product and the amount of traffic your digital properties receive are all factors that might change the concurrency your agents can handle. Any automation you have in place may also impact the total count. You may need a different number of agents on hand during peak periods.

- **Give yourself time:** If it seems too difficult to arrive at a single number, give yourself and your organisation permission to experiment with staffing numbers to help determine how many agents will adequately handle the messaging load at any given time.

# 10 Managing your customers' expectations

- **Train your agents:** Give agents the knowledge they need to provide the best customer experience. More experienced agents can handle more conversations without putting customer satisfaction at risk, but agents can also work together to tackle difficult queries.

  Handing the conversation off to another agent, with the full conversation history and context, keeps customers in good hands while fostering internal collaboration.

- **Don't leave customers hanging:** Don't forget to set expectations for your customers, especially if your agents aren't available at the moment.

  Set up business hours to let your customers know when agents will be available, and give them the option to leave a message so they can still be helped when agents return.

  An autoresponder or chatbot can communicate operational hours and help your customer self-serve when agents aren't there to help. When a customer sees that their message has been acknowledged, they will be less likely to escalate to a different channel.

  Customers engaged through mobile or social messaging can be brought back to the conversation with a push notification or proactive messages. For customers who start a conversation from desktop messaging, consider transferring the conversation to email in the off hours to keep the conversation going.

**Zendesk has everything you need to get started with messaging for your business. Learn more here.**

# 11

# Appendix: KPIs to measure the performance of your customer conversations

### Volume

*Total conversations and engagement from customers through support channels*

Messaging lowers the volume of conversations from other support channels, like email and voice, because it's convenient for customers and easily accessible. While the volume of messaging conversations might be higher for agents, the ability to respond asynchronously without dropping the conversation means the agent will have an easier time multitasking during peak hours.

### Average Handle Time (AHT)

*The time a customer begins a conversation on a real-time channel until the end*

Average Handle Time is a metric commonly used for calls. It is calculated by total talk time, hold time and follow up divided by the number of calls. Since messaging isn't session-based and the thread never disappears, AHT may not be the most helpful metric. Full Resolution Time, from the beginning of the conversation to when the agent is finished is better suited to messaging.

### Average Conversation Duration / Average Resolution Time

*The average length of a conversation / its time to resolution*

Longer doesn't mean worse — it means the customer can take their time. Businesses might expect a longer conversation duration if their customer understands that they can reply at their own pace without accidentally disconnecting the conversation.

### First Contact Resolution (FCR) Rate

*The percentage of resolved engagements during the initial contact with an agent*

This may be a more important metric than Average Conversation Duration as it is more descriptive about how your agents are performing. The more agents can respond to real-time chats during their first contact, the better your customer satisfaction levels will be.

## First Reply Time (FRT)

*The time between the start of a conversation and the first response from an agent*

While messaging is asynchronous, it's crucial to keep FRT low so customers don't switch to another channel. If agents aren't available, automated responses and bots can step in to set new expectations – or maybe save the day.

## Resolution Rate

*The amount of resolved conversations*

Resolution Rate displays the percentage of enquiries that are resolved with no agent involvement, indirect resolution answers and the median resolution time. Before replying, agents have a bit of leeway to consult with a colleague or an external application to compose the right answer, increasing first-time resolution rates and customer satisfaction.

## Customer Satisfaction (CSAT)

*A key performance indicator that shows how customers feel about the service they received*

Customers are happy to chat with brands on their favourite channels, and with ongoing conversation threads they're not obliged to repeat themselves. Companies that boast the fastest resolution times and highest satisfaction scores are more likely to be messaging with their customers.

## Service Level Agreements (SLAs)

*A set of objectives that defines the level of service between a company and its customers*

For traditional contact centres, the commonly reproduced 80/20 SLA suggests that 80% of calls should be answered within 20 seconds – but messaging breaks this mould. Your support team may want to embrace other KPIs better adapted to asynchronous communication methods, such as concurrency, active time and idle time between responses.

# Start a free Zendesk trial to get started with messaging

**Sign up here.**

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