

PROACTIVE SUPPORT: KEY INSIGHTS IN AN ECONOMIC RECESSION.



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WHY IS PROACTIVE SUPPORT SO IMPORTANT — ESPECIALLY RIGHT NOW?

In today's economic climate, reactive support — where agents wait for customers to raise issues before solving them — is inadequate because customers have higher expectations than ever before.

With people looking for any and every reason to churn, proactively getting ahead of support issues before they have had a chance to cause friction **could mean the difference between a customer who churns and one who stays.**



It is critical for companies to do whatever they can to retain customers. Very rarely do customers reach out to report positive experiences. With reactive support, you're always playing catch-up. Proactive support helps you get ahead of these issues.

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In the current economic climate, it is more important than ever to focus on net revenue retention (NRR). The fact of the matter is that most customers don't reach out if they're experiencing friction. They just churn. That's why proactive support is crucial.



Sam Dehart

Customer Success Manager, Assembled





Not only is proactive support good for users, it's also better for internal teams. Proactively solving issues before they have a chance to land in your inbox frees up your team to deal with higher-priority, higher-impact problems. It also boosts employee NPS.

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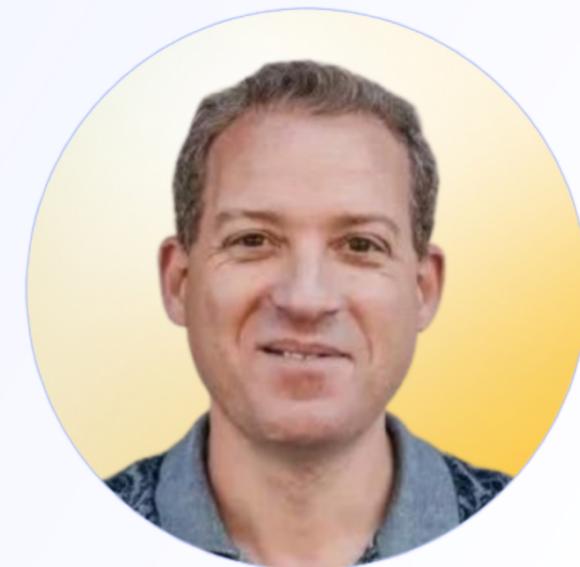


WHAT DOES PROACTIVE SUPPORT LOOK LIKE?



*"I used to work at an online bookstore. Sometimes, customers would reach out to tell us that their shipment has been delayed. When we told them we were already aware of the delay, **they'd get annoyed that we hadn't reached out to them first.** So we put in place processes to do just that. And that proactivity increased customer satisfaction and significantly decreased our support burden."*

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*"The company I worked at previously was called Imperfect Foods. It was a grocery delivery company. We used to run proactive campaigns – out of Zendesk at the time – where we would send a message to a random selection of customers who had recently placed an order with us but hadn't reached out to support. Essentially, we'd ask them how their delivery was. **About 5 or 10 percent would write back to say there had actually been a problem.** We never would have discovered those issues if we hadn't proactively reached out to them."*

Sam Dehart



HOW MANY COMPANIES ALREADY HAVE PROACTIVE SUPPORT PROCESSES IN PLACE?*

*based on a survey conducted of this webinar's participants.



We do have proactive support processes in place



We don't have proactive support processes in place



We're not sure we have proactive support processes in place



WHAT ARE THE BEST WAYS TO OPTIMIZE PROACTIVE SUPPORT PROCESSES AND WORKFLOWS?



Every organization struggles with IT resources, but there's a lot you can do to optimize your processes by implementing low-tech solutions.



Absolutely. A mantra I have is 'if you see something, say something, solve something.' Even just encouraging front line agents to report issues they see often — in a Slack channel maybe — can really level up your proactive support processes. It doesn't have to always be the most high-tech solution to be effective.

If you do need IT resources, it is crucial to get the right stakeholders on board from the get-go. Everyone needs to be on the same page.



On the slightly techier side, things like tags and forms can also be effective if implemented correctly.



I'm anti-tagging as a general rule, but I do think they have their place - especially here. Another thing that is crucial is customer journey mapping. Sales, marketing, product and support need to get in a room and make sure they nail the customer journey and all the touchpoints. Then you know where to deploy proactive support.

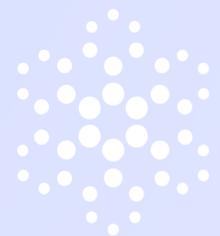


There are also some great products on the market that can harness the power of AI and ML to scan customer conversations for actionable insights.



WHAT TECHNOLOGY WOULD YOU IMPLEMENT FOR PROACTIVE CUSTOMER SUPPORT?

I've seen lang.ai implemented very successfully. Another great one is sentisum.com. These sort of tools do two things: they remove some of the manual work involved in things like tagging. They also analyze all those conversations to look for actionable patterns and insights.



lang.ai



SentiSum

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A company that has been on my radar recently is askstylo.com. They're a little bit more on the startup/disruptor end of things. I haven't implemented it myself, but I've worked with some clients who have and they have great things to say.



Sam Dehart

Customer Success Manager, Assembled





We used idiomatic.com at Trello and it was very helpful for tagging conversations and analyzing them. Another useful one was solvvy.com. Less so on solving issues and moreso on presenting information to a customer before they knew they needed it.



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WHEN RETOOLING PROCESSES, SHOULD YOU LOOK FOR BROADER TRENDS OR IMPLEMENT INDIVIDUAL FEEDBACK FROM USERS?

I think it is advisable to make changes based on individual feedback — especially if you work with KCS methodology.



I think that there's a balance here, right? The way I look at it is pain and frequency. If you have an issue that is highly painful to users but infrequent, prioritize it. On the flipside, if you have a frequent problem that is mildly annoying to a lot of people, prioritize that too.

I think it's about pain, frequency AND internal pain. If an issue is infrequent and painful for the team and a user, I would work on a case-by-case basis.



**WHAT KPIS SHOULD YOU KEEP AN EYE ON
TO DETERMINE IF YOUR PROACTIVE
SUPPORT PROCESS IS WORKING?**



I think this comes back to tagging. If you know you have a tag that is dominating your conversations, measuring how that volume falls over time can tell you how well you're doing. CSAT/CES for each tag is also helpful to keep an eye on.

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I think CSAT /CES is crucial to keep an eye on. For any tag, compare the CSAT for both outbound (proactive) communication and inbound (reactive) communication. I'm pretty confident CSAT for outbound would be higher because of the proactivity of reaching out before it becomes a major pain point.

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Going with a slightly different angle, how can we continually prove that customer support is not just a cost center? I would urge companies to measure the revenue they gain as a result of putting more proactive processes in play. Measure KPIs like average account value and average subscription term.



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Customer Success Manager, Assembled



HOW CAN PROACTIVE SUPPORT BE HARNESSED FOR SUPPORT CALLS?

If you discover an issue is affecting some portion of your user base, you can immediately record an announcement and send that out to users who you know are affected by the issue. Similarly, when your agents aren't dealing with inbound calls, they can make some outbound calls to proactively inform users of the issue.



HOW DO VIRTUAL AGENTS AND AI CHATBOTS FIT INTO THE PROACTIVE SUPPORT PICTURE?

Chatbots are an interesting tool because when they're done right, they can be absolutely amazing at pushing top-of-mind issues to the forefront of customer interactions. Where I start to fall out of love with them is when they are overused or badly implemented, causing needless user frustration. Implementation and strategy matter.



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It's not the technology that's in question, it's the implementation. It's better to have a chatbot that solves one use case really well than one that tries to solve a bunch of different use cases in a substandard way. We fell so in love with what this technology could do that we started to believe it was the answer to everything. That's simply not the case.

Let robots do what robots are going to do; let humans do what humans are going to do. Bots free up human agents to do human work — work that requires hearts and minds.



One thing I would urge companies to keep in mind is that when they have perfected their support center and chatbots, they should expect their average handle time to go up. This isn't always obvious, but it's important to be aware of. Once all the easier issues are solved with chatbots and articles, what filters through are the complex requests that take time to solve. However, it's tickets like these that allow you to nurture those customer relationships and ensure your customers don't churn and develop a sense of loyalty to your brand.

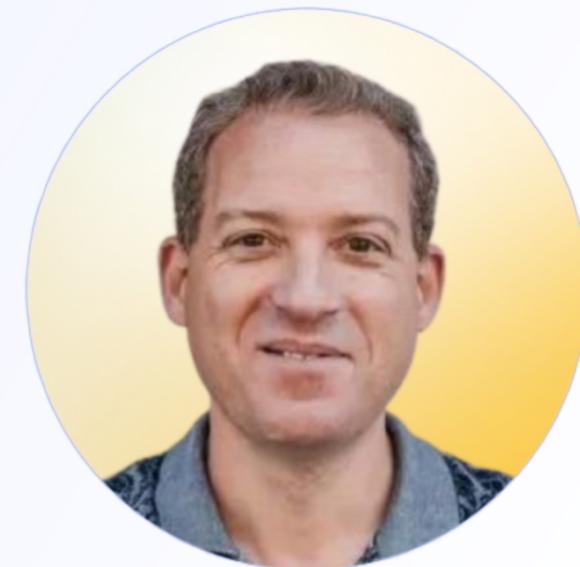


WHAT IS THE ROI ON GOOD PROACTIVE SUPPORT?



*"A company I worked with in the past was a broadband company that was subscription-based. They realized that they didn't have any proactive support practices in place for when customers defaulted on a payment for whatever reason – perhaps they changed banks or their card expired. After putting in place a proactive workflow where they reached out to these customers to ask why they defaulted on a payment, **they managed to retain 19% of them and prevent them from churning.**"*

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*"The most fascinating thing about proactive support is how it can contribute to **one-off situations that are hard to measure in absolute terms but make an enormous impact otherwise.** One of our customers at Assembled started receiving an enormous amount of complaints that the nozzle on one of their products wasn't working. They quickly guessed that the nozzle was actually defective and intercepted a shipment. It's hard to measure the revenue they gained from that or the customers they retained, but it stands to reason that it made a big positive impact.*

Sam Dehart



**WANT TO LEARN MORE ABOUT PROACTIVE
SUPPORT? FIND MORE RESOURCES IN THE
NEXT SLIDE.**



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