



The Guide to Moving From Transactional to Conversational Support



Do you know what is universally hated by humans all over the world? Taking a number. Whether it's at the deli counter or the DMV, "taking a number" usually implies you'll have to wait for a significant amount of time, and be treated with little to no empathy. Unless your brand is aiming to be more like the DMV (which we hope isn't true!), it's time to stop treating your customers like a number.

Customers aren't just another email to clear from the queue. Behind your support tickets are real people, each with their own set of needs, frustrations and history. Successful brands are beginning to realize that they need to support the full customer — not just the ticket in front of them. For example, the way that people communicate in their daily lives is changing. More people are interacting with their friends, family and colleagues through channels like Instagram, WhatsApp and Slack. It's no surprise that their preferences for contacting businesses align with how they communicate in their daily lives. With the popularity of texting, messaging apps, and instant chat options, we're all more likely to expect an instant response than ever before.

Contacting support can be an uncomfortable and unfamiliar experience. A customer may have used your product for years before ever needing help, or they may be brand new and not very familiar with your interface at all. By making it simple for them to reach you, you're already clearing the first hurdle they likely expected to encounter. And if you provide an experience that's

seamless on their end — no matter which method of contact they use — you'll be creating positivity that leads to lifelong customers. That's key, because according to [Kustomer research](#), 85% of consumers would avoid a brand due to bad customer service, but 59% of consumers are willing to pay a premium for a brand known to provide outstanding customer service.



Read on to learn how conversational customer support compares to traditional transactional customer support, and how your team can embrace this new mindset to deliver more personalized support at scale.

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What Is Conversational Support?

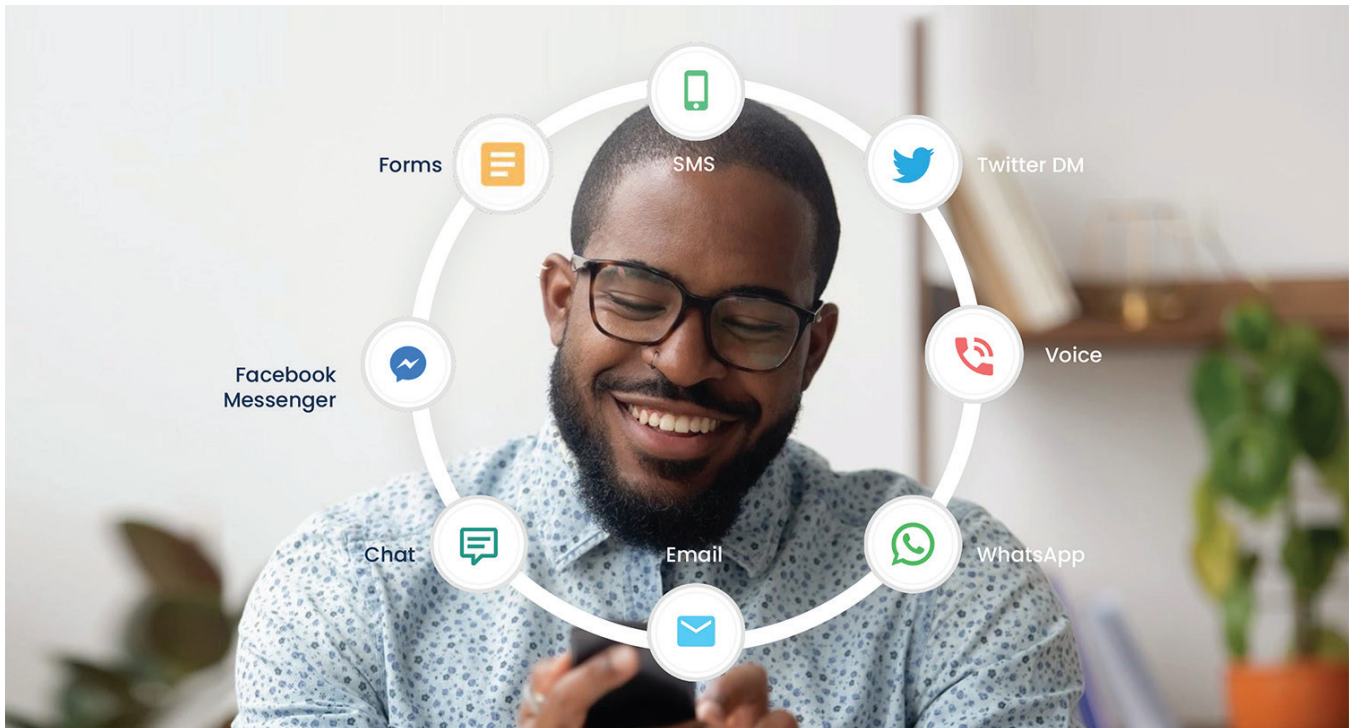


Conversational customer support focuses on building a long term relationship, rather than resolving a series of issues. It uses context and data to make it easy for customers to get help, while allowing agents to provide more personalized support at scale. It's easier to grasp what conversational customer support means when contrasting it against traditional transactional support. Traditional help desks treat each new customer contact like an entirely separate incident. Each ticket gets its own number, and agents work through these issues in a queue. It's difficult to make connections because information is siloed, and even though customers feel their interactions are connected, companies don't treat them that way. Imagine trying to build a friendship with someone new if you had to ask their name, location, and a list of interests every time you interacted. They'd be understandably upset that you couldn't remember anything about them. And you wouldn't be able to build a relationship if you start from the ground up with every conversation. These expectations are starting to creep into customer's relationships with brands.

Delivering this level of relational support might have been impossible at scale even a few years ago, but technology is catching up to the expectations of customers. By integrating systems and channels, and empowering agents to build relationships, every company now has the ability to deliver conversational customer support to each and every customer.



Conversational customer support focuses on building a long term relationship.



The Omnichannel Factor

People are accustomed to instant replies and constant connection through social media and texting, so those expectations naturally carry over to how they prefer to communicate with brands. With so many options available these days, the variety of support channels can be overwhelming from a user standpoint, as customers try to decide the best way to get their problems solved. Instead of putting that burden on the customer, true omnichannel support allows customers to choose their preferred channel of service — whether that’s e-mail, live chat, Instagram, Twitter, chat, voice, or any other option you offer — and switch between those channels seamlessly.

Traditional transactional support treats each new contact through a different channel as a different incident. Help desks allow agents to “merge” these transactions into one, but agents have to locate the

tickets, and information frequently gets lost between multiple systems.

When using an omnichannel CRM, customers find it easy to contact you on whatever channel they choose, and are able to switch channels seamlessly mid-conversation. That’s because all customer information and history, no matter where it came from, is merged into one single view, allowing your team to service customers instantly, without losing context.

Integrated Data for Continuous Context

Understanding how customers have come to land in your queue is a big part of conversational customer support. Context is key in order to help customers effectively. Pulling context from other platforms or tools into one single CRM makes it easy to see what’s going wrong, or even jump in proactively.

For example:



Does the customer have an order being delivered? What's the current status of the shipment?



What other products has the customer purchased? Can you suggest something that fits their previous history?



Does the customer have a quarterly business review or renewal coming up? Should sales be pulled into the conversation?



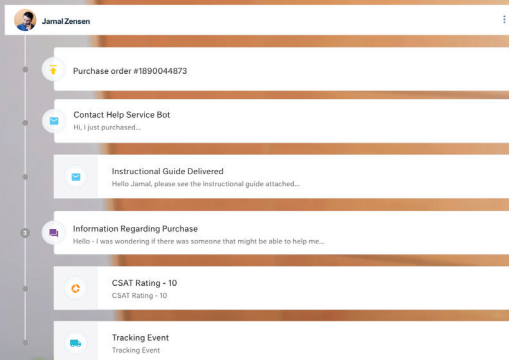
Has the customer searched the knowledge base already? Have they read relevant documentation, or would that be helpful to send?

One of the unique aspects of conversational customer service CRM is the ability to aggregate the entire customer experience into one stream, regardless of where the customer has been.

Creating a support environment that allows for ongoing conversations and a 360-degree view of the customer, rather than one-off phone calls or email tickets, enables you to build better relationships with your customers.



Traditional transactional support treats each new contact through a different channel as a different incident.



Conversational in Tone

It's not always what you say — it's also how you say it. When shifting to conversational support, building rapport with the customer becomes more important. Most people naturally have a good idea of what it means to use a conversational tone. It's friendly, engaging and polite. There's no lecturing, or academic business-speak and it doesn't sound like a robotic script. Because conversational customer support helps build relationships, you might see the same customers coming back time and time again. You'll have their previous conversation history available, so feel free to ask them how their last trip went, how their daughter liked their new shoes or wish them a happy birthday — as long as it's professional. Moving beyond a dry, transactional tone helps break down walls between you and the customer, and makes the customer feel valued as an individual rather than a dollar sign.

Transactional Support



Customers are identified by a ticket number and open a new incident report for each question.



Businesses use contact forms and generic automatic replies to organize customers into a queue.



Each contact channel is handled separately, resulting in information being repeated, details being lost and customers handed off between teams.



Troubleshooting is often generic, automated and not truly helpful.

Conversational Support



Customers have an ongoing conversation with support that evolves over time.



Businesses make it easy for customers to contact them on any channel.



Customer conversations are integrated so every agent has access to the full history of each customer.



Support is personalized and unique to each customer. Agents advocate for their customers.

Why Use Conversational Customer Support?

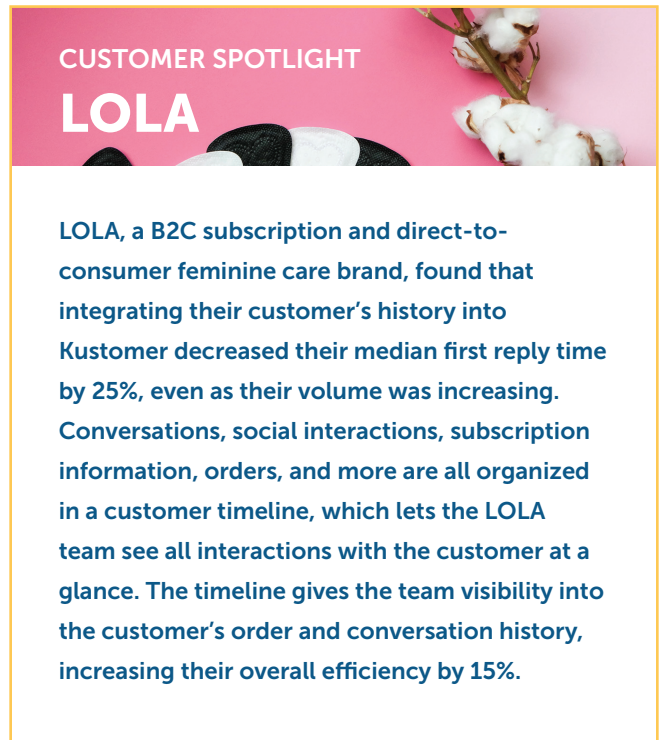
Conversational customer support has two major benefits: It's scalable, and it helps you build closer relationships with your customers. The ability to effortlessly grow your support team and coverage as business increases, while also improving each customer relationship along the way, will take your team to new heights.

How to Scale Conversational Support

Transactional support grows in a steady ratio. Each ticket is handled the same way, and every time there is a surge in tickets you need to hire additional agents to deal with them. For example, if your organization currently offers phone support, your agents are either on the phone, gathering information and solving problems, or they're not. If everyone's busy and you've got more calls coming in, you'll need to hire more agents to handle the load. Conversational support is scalable. Because customer contacts are gathered in one conversation, an agent can get up to speed with the customer's history and resolve issues quickly. With the ability to see the whole picture, agents can not only help with the current issue, but also provide next-issue avoidance support to tackle likely future issues before the customer even knows they exist.

Plus, agent collision never occurs. If customers try to get their issue resolved on multiple channels, there won't be multiple tickets created, handled by multiple agents, with different resolutions. All customer outreach will be aggregated into one single view, allowing agents to cut down on duplicative work and resolve issues across all channels at once.

Not every issue requires a full conversation, either. By offering self-service options at the right time and in the right place, customers can help themselves. Traditional transactional issues (like asking about the location of an order) can be dealt with through chatbots or automated order updates. Proactive outreach is the most cost-effective way to provide quality support. Handling every individual inbound support call [costs on average](#) \$11, while a self-service interaction is closer to one dollar. Reducing the need for customers to talk to a human is a more cost-effective way to provide conversational support. Done right, conversational customer support makes it possible to scale personal, intimate customer relationships, even as your company grows well beyond a size your agents could handle transactionally.



CUSTOMER SPOTLIGHT
LOLA

LOLA, a B2C subscription and direct-to-consumer feminine care brand, found that integrating their customer's history into Kustomer decreased their median first reply time by 25%, even as their volume was increasing. Conversations, social interactions, subscription information, orders, and more are all organized in a customer timeline, which lets the LOLA team see all interactions with the customer at a glance. The timeline gives the team visibility into the customer's order and conversation history, increasing their overall efficiency by 15%.

Relationship Building for Lifelong Customers

Conversational customer support also helps build stronger relationships with your customers. Customers want to do business with companies that make it easy. Contact forms, inability to find answers on their own, and being treated like a ticket, make it more difficult for customers to get their problems solved. With every barrier placed in their way, you miss an opportunity to expand a customer's loyalty.

Conversational support eliminates barriers, and reduces the amount of effort needed for customers to get their issue resolved. They can contact you on their favorite channel, and can expect the same level of service regardless. Plus, they don't need to repeat themselves or offer a long backstory. Conversational support means that agents already have all the necessary information to help right in front of them. Thinking of support in terms of a relationship, rather than a series of independent tickets to "get through" changes everything.

CUSTOMER SPOTLIGHT

Glossier

Glossier's support team, or their "gTeam" differentiates its specific brand of service by providing responsive, personal help to every one of the brand's loyal group of fans. Instead of limiting interactions with customers, they encourage customers to get in touch as often as possible and continue to build the relationship. Because Glossier's gTeam is embedded in their marketing department, this influx of feedback also helps inform future campaigns and product improvements.

Implications of Conversational Support



Scales more effectively than transactional support, because issues can be addressed proactively, and through self-service.



Builds stronger relationships because customers are treated as people, not tickets.



Empowers CX teams with a 360-degree view of the customer, that facilitates personalized service.



Reduces customer effort, which is a leading cause of disloyalty.

How to Provide Conversational Support

Once you've decided to make conversational customer support a part of your team's core, the next hurdle is figuring out how to make it happen. There's four pieces to a conversational support strategy:

- 1 **Embracing Omnichannel Support**
- 2 **Building Rapport**
- 3 **Empowering Agents**
- 4 **Choosing the Right Platform**

Embracing Omnichannel Support

Instead of herding customers into the method of support you prefer, offer several and let them pick the one they want. When choosing which channels to offer, it's important to set them up in a way that doesn't compromise the quality of support your team can provide. Each support channel should feel equally tended to and useful to your customers, so they don't end up stuck switching between them trying to find the one with the best response.

However, if a customer does switch methods midway through, an omnichannel CRM will enable you to deliver the same level of support throughout. You'll still have a full view of their history, and will be able to pick up where you left off on the other channel.

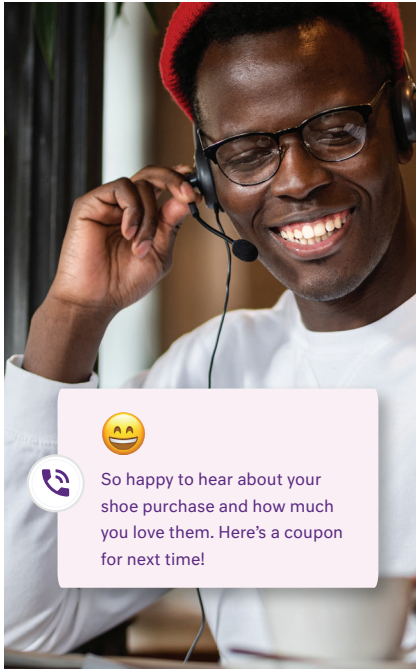
Instead of making a customer learn and use an entirely new platform — especially one specific to your organization — try to meet them where they are. [Eighty-one percent of Americans](#) own a smartphone, so chances are those people are going to be open to contacting you using that smartphone, and many

even prefer it. A [Twilio survey](#) found nine out of 10 consumers said they want to contact businesses through messaging. Further 77% of them keep notifications on for messaging apps, providing an excellent way for you to connect with them instantly. Considering this, why not offer support over chat, SMS, or social messaging apps?



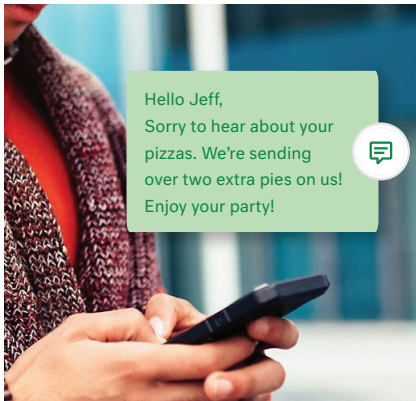
Building Rapport

Conversational support is built on a foundation of personal, friendly interactions. Agents need to recognize the importance of advocating for the customer and work to develop their skills in a few key areas to best build rapport:



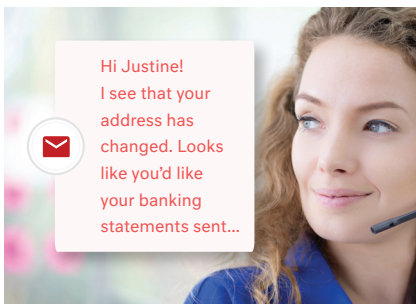
Mirroring and Tone

Whether drafting a reply in real-time or using automated messaging, finding the right tone for support interactions is one of the first skills any agent must master. An agent who can read the mood of a customer and set their tone to match, will see better results than the one who always uses the same style. By mirroring a customer — even if doing something as simple as using casual terms and dropping in an emoji after the customer does first — can go a long way to improve the relationship. A customer service agent must know the appropriate tone to use to calm frustration, convey understanding of the issue, and express empathy. Finding the balance between a professional tone and meeting the user where they are and how they like to communicate is essential. Agents can benefit from software that provides sentiment analysis, giving insight into how happy or upset a customer is and escalating the issue accordingly.



Empathy

The ability to empathize is vital across all customer support interactions. While you may know your product or service inside and out, the ability to recall what it's like not to know, as well as to understand how needing help can feel frustrating, is required to be a top-notch agent. In fact, during the 2020 global pandemic, empathetic service was the number one most valued attribute in customer service, according to Kustomer research.



Personalization

When possible, use names and account-specific details to make it clear to the customer you know precisely who you're talking to and that you have access to the information you need to answer their questions.

Empowering Agents



Just about everyone who's ever had a cable TV or internet plan has a story about how awful the customer service was for them. Being directed to call a different department, or wait on hold for the supervisor is frustrating! Do your best to avoid forcing customers to sit through one agent telling them they can't help or waiting for an agent who can. In every possible instance, empower your agents to handle any issue that comes their way on their own.

Technology can help with this by routing conversations to the right team at the right time. But empowerment is a people policy, not a process. Trusting agents to do the right thing with the information they have gets tougher at scale. Empower your agents to connect with the customer and solve the problem, by providing them with the tools and resources they need to get the job done.

Choosing the Right Platform

The best way to implement conversational customer support effectively is with a tool built to handle it.

First, find a tool that can help with self-service as much as possible. Chatbots can be of great help in clearing more straightforward, transactional issues, allowing support agents to handle the more complex, emotionally-wrought inquiries. The agent receiving the incoming message will need context to understand the issue and provide the best help possible. Make sure they can see the full customer history, including details of the customer's ongoing use of your product and communications.

To make the switch to a CX CRM that can help achieve this, you'll need to assess which incoming support channels to use and integrate them, then build workflows to eliminate manual routing and triaging. If you're using a chatbot, determine when and for which issues, then make sure the path to a human is clear and accessible when needed. Setting all of this up will be pointless if you leave your customer in a loop of frustrating automations and keep them from reaching your team as soon as they need to. Using a platform that helps automate transactional interactions, and supports conversations, will make your team more effective.

CUSTOMER SPOTLIGHT

LOLA

LOLA's support team used [Kustomer's Workflows and Bulk Messaging](#) to handle over five times their normal volume during a brief outage on their subscription management page—without compromising the quality of their personalized support.

Delight With Conversational Customer Support

As cliché as it sounds, conversational support is based on treating your customers how you would want to be treated. It means making it easier for customers to get in touch on the channels they want to use, and providing the same friendly service regardless. In order to treat customers as the complex humans they are, we need to understand the context around their questions — and that means gaining a 360-degree view of the customer.

But conversational support gets more difficult as teams grow. We know less about each customer, and have less time to spend with each one. That's where customer support tools come in to help out. Using self-service, automation and smart workflows allows teams to provide omnichannel support at scale, without going crazy. Moving from transactional support to conversational support brings your customers closer to your brand, because you're meeting them halfway. Delight your customers and build lifelong relationships with conversational customer support.



About Kustomer: Kustomer is the world's top-rated customer experience CRM, helping leading brands create customers for life. With an advanced, AI-powered, omnichannel customer service platform, Kustomer delivers a unified single view of the customer, automates manual tasks, and scales easily to deliver the efficient and effortless experiences businesses, agents and consumers love.



To learn how Kustomer can help power conversational support for your brand, visit [Kustomer.com/Demo](https://kustomer.com/Demo)