geckoboard

UNSTUCK

The Inspiration Playbook for Customer Service Teams

Introduction

Delivering exceptional customer support is no longer just a differentiator – it's an absolute necessity. Organizations are under immense pressure to provide timely, personalized and seamless experiences across various channels. Customer expectations are constantly evolving, and so customer service teams must be equipped and ready to keep up with them.

The problem is, customer support can often be a 'firefighting' routine that's hard to break out of. In fact, when we surveyed Customer Support professionals for our research, one respondent shared that support teams are "often underfunded, understaffed, and left out of strategic planning." How can Support teams brainstorm for new ways to get ahead when all their energy is spent on maintaining its current level of service?

We created Unstuck to give busy Support teams a playbook they can turn to for ideas and best practice around how to elevate your customer service game. From teamwork to tooling, Unstuck shares little tips, sage advice and big ideas from our very own team, as well as Customer Support professionals, senior leaders and even entrepreneur founders.

Whether you're looking for better ways of doing things, or you just want to give your Support agents a fun new challenge to try, we hope Unstuck unsticks something for you.

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1.

Hold regular team retrospectives

No one has more information on how to improve your Support team than your Support Agents themselves. They are also often the least consulted. Hold broad-reaching team retrospectives to determine opportunities for improving team frustrations. Brainstorm ideas on improvements, and commit to trying one out.

CUSTOMER EXPERIENCE

Basic

2.

Model future ticket demand based on seasonality and trends to anticipate resourcing needs

Be proactive in your staffing model. Think about upcoming changes to your business, such as seasonality, promotions, service updates or feature launches, and forecast incoming volume based on the impact these changes will have. Find the average number of cases each agent can handle per hour, and then calculate the number of agent hours you'll need to increase or decrease in order to handle the forecasted change in volume.

CUSTOMER EXPERIENCE

Advanced

READ: Best practices to prepare for a busy season | Zendesk

3.

Close the loop on negative feedback

As you track CX metrics over time, you might occasionally see dips in core KPIs (e.g. NPS). To help both your company and clients feel successful after customer feedback has been delivered, as well as recover poor CX metrics, you need to have an efficient process for taking action and closing the loop.

CUSTOMER EXPERIENCE

Intermediate

Delighted

Suggested by Sean Mancillas, Lead Customer Concierge, Delighted

READ: Closing the Loop | Delighted

4.

Monitor negative CSAT scores and follow up

First step: implement a feedback system on your customer support tickets. Great! Now, you'll need a way to monitor conversations that receive a bad satisfaction rating. Most help desks will allow you to set up notifications that email managers when a bad rating comes in. You can also set up a queue to see all of them at once. Monitoring the "drivers of dissatisfaction" will help you understand the common causes for customer unhappiness.

CUSTOMER EXPERIENCE

Basic

5.

Expand your team's availability outside of local business hours

Offer weekend and evening support to reduce first response times, or get ahead of the Monday morning inbox explosion. You can do this a number of different ways, including scheduling agents into different shifts, or scaling your team around the globe. A follow-the-sun model where agents located globally all work their own daytime hours can be particularly helpful if you support customers around the globe too, as it gives you local insight and language capabilities.

CUSTOMER EXPERIENCE

Intermediate

6.

Optimize your CSAT survey for more responses

CSAT surveys are a valuable source of customer information. But all too frequently, customers don't fill them out. By improving your survey design, you can collect as many CSAT scores as possible. Take a look at the HubSpot customer satisfaction survey templates and examples for help and inspiration.

CUSTOMER EXPERIENCE

Intermediate

READ: 19 Excellent Customer Satisfaction Survey Examples | HubSpot

7.

Compare your metric with industry benchmarks

While there are multiple methods for understanding if your NPS is good or bad, external industry benchmarking gives you another way to contextualize your score. Include benchmarks in your internal reporting for key stakeholders and specific departments to monitor how you're tracking against your industry, and showcase your performance against the wider industry.

CUSTOMER EXPERIENCE

Intermediate

8.

Use customer journey mapping to see your customer's experience from their perspective

Recreate the journey your customer goes on to understand things from their perspective. This can help you find opportunities to improve onboarding, make it easier to use your product, and create effortless support experiences. Use Salesforce's Customer Journey Mapping tool to create visual representations of interactions your customers have with your brand.

CUSTOMER EXPERIENCE

Advanced

READ: What is Customer Journey Mapping? | Salesforce

9.

Create an autoresponder

Set up automated emails to respond to all new support enquiries. These autoresponders accomplish several things, including acknowledging that the ticket was received, setting expectations on when to expect a response, and directing customers to the help center so they can find their own answers.

CUSTOMER EXPERIENCE

Basic

READ: Auto-Reply Email Sample: A Customer Service Autoresponder Template that Feels Human (Even When It's Not) | GrooveHQ

10.

Analyze help center searches

The terms that customers search for in your help center are a source of data. Dissect this data to uncover many different insights, such as what search terms result in zero results being returned. Use this to improve things like your tagging process, make existing articles more discoverable, or to create new documentation to close the gaps. It's also useful for understanding the terms customers are using when they talk about your product, or whether certain topics are being searched for more than usual, which can help identify bugs or UX issues.

CUSTOMER EXPERIENCE ●●○ Intermediate

READ: How to analyze your site search data | Algolia

11.

Create a separate Twitter account for customer service and outage communication

If you're frequently communicating with customers over Twitter, you may want to create a separate Twitter handle dedicated to helping customers. This will prevent your status and customer service tweets from overwhelming your marketing material. Plus, it can help your customer service team respond faster to incoming questions over social media.

CUSTOMER EXPERIENCE

Intermediate

12.

Follow up on customer feedback

Customers leave feedback and CSAT ratings on only a fraction of your customer interactions and touchpoints. So, whenever you receive a review from your users, make sure to make the most out of it. Following up on CSAT and feedback is the easiest way to win back disappointed customers and build customer loyalty.

CUSTOMER EXPERIENCE

Intermediate

Klaus

Suggested by Merily Leis, Head of Marketing, Klaus

READ: 3 Ways to Improve CSAT Immediately | Klaus

13.

User test your help center documentation to check it's easy to understand

If your documentation isn't easy to navigate and understand it's not actually going to help anyone. User-testing will help you uncover the areas where you could be more clear or provide additional information. To user test documentation, have a new user attempt to complete a task using only your documentation. Do they navigate directly to the correct article? Where do they need to ask additional questions?

CUSTOMER EXPERIENCE Advanced

READ: How to Test the Usability of Documents | UX matters

14.

Implement a status page

A status page is a website used to update customers during outages and to communicate bugs and functionality issues. It's a tool that customers who are experiencing an issue can use as a first port of call to see if you're already aware and dealing with it.

CUSTOMER EXPERIENCE

Basic

15.

Read The Effortless Experience

Drive loyalty and retention by providing quick and efficient Customer experience. This concept is explored in depth and backed with data in The Effortless Experience, written by Matthew Dixon. It includes lots of helpful tips, tools and templates to help too.

CUSTOMER EXPERIENCE

Basic

READ: The Effortless Experience: Conquering the New Battleground for Customer Loyalty | Bookshop

16.

Track Customer Effort Score

Customer Effort Score (CES) asks customers how easy it was to solve their problem or get help. Tracking CES in addition to, or even instead of CSAT, provides a different perspective on how you can improve your customers' experience.

CUSTOMER EXPERIENCE

Intermediate

17.

Double-check how your CSAT is calculated

CSAT is not always measured in the same way across different tools or teams, and if you don't know which approach is being taken this makes comparisons difficult. One less obvious thing to check is the time frame your CSAT is calculated over, and whether its based on when the ticket was created, or when the ticket was solved.

CUSTOMER EXPERIENCE ●●● Advanced

18.

Regularly track Customer Experience metrics

Evaluate the quality of the overall relationship a customer has with you. The goal is to monitor how your customer base feels about your company over time as both your business and the market evolve. Insights gathered are to inform strategies that improve customer loyalty, and subsequently revenue through increased customer retention, reduced churn, and word of mouth.

CUSTOMER EXPERIENCE

Intermediate

Delighted

Suggested by Sean Mancillas, Lead Customer Concierge, Delighted

READ: CSAT vs NPS vs CES: Which customer satisfaction metric is best? | Delighted

19.

Use 5 Whys Analysis to find the root cause of problems

Dig deeper into customer issues with 5 Whys Analysis. Start by asking "why?", and then ask "why?" again….until you get to the root cause of the issue. Solving the root cause can prevent other customers from experiencing the same issue in the future.

CUSTOMER EXPERIENCE

Basic

20.

Prepare for new releases

There's nothing worse than learning about a new feature right before (or even after!) it has released to customers. Create a standard plan to ensure the customer support team is informed ahead of any new product or service changes so they can prepare, anticipate issues, and communicate to customers who may be aversely affected. Include this plan as part of the product management system (such as adding it to release cards in JIRA). Anticipate potential customer complaints and concerns ahead of release and prepare well thought out answers, including documentation. Not only will these decrease incoming support requests, it can also increase product usage and feature adoption.

CUSTOMER EXPERIENCE

Intermediate

21.

Set up recurring catchups with high-value customers

Set up dedicated time with your most important customers to check-in before things go wrong. Build a good relationship and offer support proactively to ensure they're successful. Customer success teams might find the quarterly business review (QBR) format helpful to ensure they are asking the right questions during these check-ins.

CUSTOMER EXPERIENCE

Intermediate

READ: 10 best in-app messaging examples that engage users | Appcues

22.

Set up policies for security reports and bug bounties

If you set up a process for reporting bugs and security vulnerabilities, your product will be more secure. Hackers are incentivized to test your software and report anything they find, so you can fix it before it's exploited.

CUSTOMER EXPERIENCE

Advanced

23.

Run a 'Start Stop Continue' exercise with your team

In a team meeting or survey, ask your team what they think you should START doing, what you should STOP doing, and what you should CONTINUE doing. You might be surprised at the answers!

CUSTOMER EXPERIENCE Intermediate

READ: Bag of Tricks: Start / Stop / Continue | People Results

24.

Don't just solve the ticket, offer suggestions too

Go beyond answering the customer's initial query and look for opportunities to help them get more value from the product. Customer support agents aren't just fixers, we're educators too!

CUSTOMER EXPERIENCE

Intermediate

READ: The support leader's guide to proactive support: Provide help before it's needed | Intercom

25.

Implement callback systems

If you're struggling to bring down your average hold time, call abandonment rate and call queue, consider implementng a callback system that allows customers to request a callback rather than wait on hold.

CUSTOMER EXPERIENCE

Intermediate

26.

Monitor social media for unhappy customers

Customers may find it easier to take to social media when they're upset, rather than submitting a ticket or picking up the phone. Monitoring social media for customer questions and complaints can help you assist customers that you might not have heard from. Social media is also a public forum, so being vigilant for customer complaints can help manage your public brand image.

CUSTOMER EXPERIENCE

Basic

READ: Social Media Customer Service: Tips and Tools to Do it Right | Hootsuite

27.

Schedule regular knowledge base audits

Your knowledge base is living documentation. As your product changes and you learn more about what your customers need, your knowledge base should be updated to reflect this. A regular help center or knowledge base audit will make sure your content is up to date, helpful and relevant.

CUSTOMER EXPERIENCE

Intermediate

READ: Five signs that your customer support needs a knowledgebase audit | MyCustomer

28.

Offer more support contact channels

Consider expanding the range of support channels you offer so customers can contact you in the way that's most convenient for them. If you are still only using email, consider adding live chat. If you're offering phone support, have you considered video calls? Listen to what your customers are asking for, and branch into new channels when you feel confident with your current setup.

CUSTOMER EXPERIENCE

Intermediate

READ: What Are the Most Effective Channels for Customer Support? | GrooveHQ

29.

Create a Basic system for tagging tickets

Tagging tickets can open up a world of data for improving your support offering. Potentially the most effective tagging system uses two categories: the part of the product that the customer is asking about, and the reason for the ticket. The product tag helps sort conversations by subject, such as "reporting" or "billing" or "returns and exchanges". The reason helps uncover the different types of tickets including "bug report" or "how do I" type questions.

CUSTOMER EXPERIENCE

Basic

30.

Find and fight friction to create content customers

What are the key moments in your customer's journey with your company? Almost certainly there are places where they get stuck, perhaps unsure what to do next or how to set things up. The moments that make them abandon a trial or start looking at alternatives.

Product marketers and data analysts can help you find those points of friction. Get your support team together and look for ways to apply some thoughtful, intentional customer service right at those moments. It can magnify the results of your customer service efforts and make you a valuable part of growing your business.

CUSTOMER EXPERIENCE

Intermediate

Help Scout

Suggested by Mat Patterson, Customer Service Educator, Help Scout

READ: The Skills You Need for a Support-Driven Growth Role | Help Scout

31.

Create triggers for when a conversation has too many updates

Set up triggers to notify team leads when a conversation has too many replies (ie. more than five or six). Often these conversations are either spiralling out of control, or the agent is struggling to wrap it up. Having a second set of eyes on these longer conversations may help identify a training opportunity.

EFFICIENCY

Advanced

geckoboard

Suggested by Luis Hernandez

32.

Fine-tune your agents' schedules using data to make sure you're meeting demand

When do most of your tickets come in during the day? When are your response times the slowest? Periodically look at your staffing model (monthly or semiannually for example) to see if you need to make adjustments to accommodate fluctuations in ticket volume.

EFFICIENCY

Intermediate

geckoboard

READ: The Wide World of WFM (Workforce management) | Tymeshift

33.

Work with Engineering/IT to simplify or automate common tasks

Internal tools can make a huge difference to the Efficiency of your support team. By dedicating a certain amount of Engineering and IT time to working on customer support tools or debugging common issues, you'll reduce the overall load on the engineering team in the long run.

EFFICIENCY

Basic

34.

Create a WFM (Workforce management) strategy

Workforce management (WFM) is much more than KPIs and metrics. It's about having the right people in the right channels at the right times, to keep your support team running seamlessly no matter what curveballs are thrown at you. Implementing a good WFM strategy can mean the difference between losing customers and gaining lifelong fans.

EFFICIENCY

Intermediate

tymeshift

Suggested by Elisa Reggiardo, CBO, Tymeshift

READ: Okay, what's so great about WFM? | Medium

35.

Perform a workflow audit

Periodically audit your workflows (i.e. every 6 months) to make sure conversations are consistently worked on and categorized in the same way. For example, what kind of tickets are people putting on hold? How are people using snooze? Does your support tool have new features that you can incorporate into your workflows?

EFFICIENCY Advanced

36.

Help agents prioritize workloads by giving tickets a priority score

While all tickets are important, not all tickets are urgent. Assigning tickets a different urgency level depending on the customer type and severity of the issue can help agents give fast responses when needed. For instance, Geckoboard has different inboxes based on the priority of the ticket which enables the team to focus their attention on higher priority tickets first.

EFFICIENCY

Intermediate

READ: How to Prioritize Support Enquiries for Better Customer Satisfaction | Freshdesk

37.

Set up chatbots

Set up bots to direct customers to resources that may help them resolve their issue or that ask for more information to help an agent resolve their issue in fewer touches. Many help desks offer automated bots that you can simply enable, such as AnswerBot in Zendesk. And, with the rise of AI, these bots are able to take on more complex pathways and workflows over time.

EFFICIENCY Advanced

READ: Ada Chatbots for Zendesk | Ada

38.

Review your tagging process and build a taxonomy to ensure accuracy

If you're tagging tickets with details like product category, reason for contact, or any other data, regularly review if your tagging is accurate. You can do this through calibration sessions where agents go through tickets and tag together, or by creating a graphical overview of how each agent is tagging. For example, if you see one agent commonly using the "general" or "other" category, they may need additional coaching. This data is valuable for raising product issues, so you want to make sure it's accurate!

EFFICIENCY

Advanced

READ: A Practical Guide to Building Taxonomies That Make Data Truly Useful to Your Business | EnjoyHQ

39.

Use screensharing and co-browsing to see what your customer sees

A picture says a thousand words, and a screenshare is worth millions. Tools like Screenjar and Median are invaluable for helping agents diagnose problems or walk users through more complex tasks. Screen recording is great for email support, while co-browsing works well for live chat or phone support.

EFFICIENCY

Intermediate

40.

Implement a ticketing system

If you've not yet adopted a purpose-built ticketing system then it might be time to do so. As Luis Hernandez, VP of Customer Success at Geckoboard says, "Personally, I think that as soon as there's more than one person working on support some sort of ticketing systems needs to be implemented. Otherwise, customers won't know who is dealing with their requests and you as an agent won't know what others are working on... things will get messy!"

EFFICIENCY

Basic

41.

Use outsource partners to help during busy periods

Outsourcing isn't just a dirty word when it comes to customer service. Nowadays, many outsourcing vendors are dedicated to quality service and can actually elevate your customers' experience. For businesses that struggle to deal with busy periods, this can be a lifesaver. Instead of trying to handle the uptick with an existing team, or hiring many new agents for only a few months of the year, consider partnering with an outsourcing vendor to lend a hand.

EFFICIENCY

Intermediate

READ: How to outsource customer service | Medium

42.

A summary per mail keeps misunderstandings at bay

Summarizing what you understood about the customer's situation is your first signpost towards a solution. It shows the customer that you are listening and it helps you to contextualize your answer. If some details are missing, the customer can see this immediately and supply them seamlessly, speeding up the resolution.

EFFICIENCY

Basic

Klaus

Suggested by Valentina Thörner, Head of Product, Klaus

43.

Use BrowserStack to replicate customer issues

If your product is supported on multiple devices, your customer support team will need to be able to test on those devices. BrowserStack is a great tool to simulate customer environments across different browser versions and hardware setups, without having to create them from scratch yourself.

EFFICIENCY

Basic

READ: Browserstack.com

44.

Get your organization 'feedback ready'

Customer feedback is incredibly valuable, yet often gets lost or ignored because the foundations for using feedback correctly aren't in place. Be proactive with making sure departments across your organization are prepared to capture, process, share and act on customer feedback effectively.

EFFICIENCY

Intermediate

EnjoyHQ

Suggested by Sofia Quintero, Founder & CEO, EnjoyHQ

READ: How to use customer feedback across customer success and product | EnjoyHQ

45.

Put simpler tickets in a different queue

No one likes to wait. When you triage simpler tickets into a different queue, it prevents customers with simple issues being kept left waiting. Tickets can either be manually tagged and filtered into another queue to be worked on, or you can create rules in your helpdesk to recognize simpler questions (like "how do I reset my password?") and route them automatically. This is one way to organize your inbox to improve Efficiency. There are many others! Try what works for you.

EFFICIENCY Intermediate

46.

Create reply templates for common queries

Stop writing the same thing over and over again. Use macros, canned responses, or templates to capture commonly used responses. Collaborate with your team to create the perfect response to ensure consistency and speed.

EFFICIENCY

Basic

47.

Implement an emergency management process

Things are bound to go wrong. Downtime happens! But planning ahead can make these scary situations much more manageable. A crisis communication plan, or emergency management process, will include key points of contact, who's responsible for communicating with which customers, and what channels those messages need to go out on.

EFFICIENCY

Intermediate

READ: The Red Guide to Crisis Communication | Chatra

48.

Connect your support apps through Zapier

Integrate all of your customer support tools and platforms together using Zapier. Automate and trigger workflows to reduce manual work, and notify relevant people of urgent tickets. For example, send positive CSAT responses to your Slack channels to celebrate those small wins, or add a note to JIRA when a new problem ticket is created.

EFFICIENCY

Intermediate

READ: Connect your apps and automate workflows | Zapier

49.

Invest in debugging applications

If you're supporting a software product, using the right tools will make your team more efficient. Debugging tools like Honeycomb or Fullstory will make it easier to help your customers, even if they can't tell you much more than "it's not working".

EFFICIENCY

Intermediate

READ: Honeycomb.io

50.

Avoid support tags spiralling out of control

Tagging without a tag taxonomy will have you end up with a long list of overlapping and redundant tags that are hard to apply, difficult to synthesize and draw insight from consistently.

A bit of upfront planning can go a long way in ensuring that your tagging efforts pay off in the form of more accurate reporting that you can rely on when making decisions around your Customer experience.

EFFICIENCY Intermediate

prodsight *Suggested by Tadas Labudis, Founder & CEO, Prodsight*

51.

Link up with your sales team for smooth onboarding

Link up with your sales team to smooth out the sales > support transition. Sales & Marketing know a ton of information about the clients you'll be working with, and if you're not in the know, how can you deliver the expected value? Hop on regular calls, sync up over Slack, or figure out an automated way of getting sales call notes or pre-sale communications over to the CS team so you can proactively work toward fighting early churn and keeping your new clients happy.

EFFICIENCY

Basic

wpbuffs

Suggested by Dean Buffs, Head of Client Success, WP Buffs

52.

Identify repeatable tasks and automate them ASAP

Customer Support is all about human interaction. Customers don't care what tools you use to help them. Hence, be the best human you can while you let technology handle the boring / repeatable tasks.

EFFICIENCY

Basic

Honest

Suggested by Carlos Avendaño, CEO, Honest

53.

Talk about feelings of inferiority

Though it might sound trivial, opening a discussion about self-worth can change your team dynamics. Let your support reps know that they are not alone in this.

TEAM ●○○ Basic

Klaus

Suggested by Merily Leis, Head of Marketing, Klaus

54.

Invest in training

Your team might be tech savvy and have polished their support and communication skills, but there might be tools, tactics or services they don't know about. Set aside a budget for external training for improving skills, and encourage your team to use it for their professional development. New skills can boost your team's confidence and widen their capabilities and capacity.

TEAM

Intermediate

READ: The Ultimate Guide to Training for Customer Service & Support | HubSpot

55.

Catch and Congratulate!

Make it a habit to catch people doing great work AND give them a pat on the back for it. So often, customer support leaders focus on improvement opportunities and coaching underperformers. It's just as important, and maybe even more powerful, to notice a job well done and reinforce that behavior through a quick message. After all, who doesn't like to be congratulated? One very simple way to build a routine for "Catching and Congratulating" is through a Quality Assurance (QA) program.

TEAM Basic

PARTNER hero

Suggested by Sarah Ellenberg, Senior Program Manager at PartnerHero

geckoboard

READ: Forget Everything You Know About QA | Partner Hero

56.

Use improv games to build creativity and camaraderie

Try playing improv games with your team to help them relax, open up and put themselves in the customer's shoes. Userlike's list of classic improv games is a great place to start.

TEAM

Intermediate

57.

Reorganise your team, and ticket assignment, to increase domain knowledge

The more products your team offers, and the more technically complex they are, the harder it is for your agents to build domain expertise. This can result in slow or poor quality responses, or the need to escalate a significant proportion of tickets. By focusing agents on a smaller range of products at any given time, agents can quickly become experts on those products and provide better responses, faster.

TEAM ●●○ Intermediate

READ: How to structure your customer support organisation | Zendesk

58.

Offer horizontal progression and opportunities outside the support team

When the team structure is flat and there are few options for progression, give team members other ways of fulfilling progression needs. Share staff with another team (during down time), give them opportunities to work on additional tasks, training or courses for development. They'll bring back those skills and connections to your support team and your customers will benefit!

TEAM

Intermediate

59.

Organise customer feedback to identify trends and recurring issues

Tagging conversations is one thing, but extracting insights from that is quite another. Consider using a tool like EnjoyHQ that can help organise customer feedback from different channels, and present it in a way that lets you or other teams take action on it.

TEAM

Intermediate

60.

Spend time learning how to communicate more clearly over email

Since so much of our communication with customers is based in text. "Writing in Plain English" is a recommended LinkedIn video course created by Leslie O'Flavahan that can help agents excel in written communication. After taking this course, agents will be better prepared to manage customer expectations and avoid frustration over email.

TEAM Basic

61.

Create a feedback loop

Track your team's performance over time, discuss the progress in team meetings, and provide individual feedback in regular one-on-one sessions. Most support agents need negative feedback to grow professionally.

TEAM

Intermediate

Klaus

Suggested by Merily Leis, Head of Marketing, Klaus

READ: Customer Service Quality Assurance – The Complete Guide | Klaus

62.

Reward your CS team members

Motivate your team members with well-chosen rewards that drive the right behaviors. Be careful though - rewarding agents for the number of tickets they solve could encourage cherry-picking of easier tickets. Reward quality and quantity. For example, Staffbase offers a 1 euro donation to a charity (chosen by the team) for each positive review received. Imagine the feeling of seeing the amount raised through making customers happy at the end of a year!

TEAM

Basic

READ: Case study: How the Staffbase Customer Care team consistently exceeds their CSAT goal (>97%) | Geckoboard

63.

Celebrate those little wins to keep the team motivated

In customer support, you are often too close to troubles, issues and frustrations, and those can get to you or anyone in the team. Therefore it's important to celebrate the little everyday wins. From turning an unhappy customer into a loyal one, to solving a tricky bug, create a culture where the little wins are acknowledged just as much as the troubles.

TEAM

Basic

READ: Celebrate those little wins to keep your team motivated | Atlassian

64.

Encourage the leap from CX to Product

Did you know that the knowledge agents gain working in support makes them excellent additions to your Product team? They're familiar with what customers like, dislike, and wish your product had, and can translate that knowledge into amazing insights.

TEAM

Intermediate

tymeshift

Suggested by Elisa Reggiardo, CBO, Tymeshift

READ: CX Agents: Product Managers in Training | Medium

65.

Foster communication in and out

When your customer service team has (suddenly) switched from a close-knit team operating in a common office space to socially distant home offices, your team's communication could easily collapse. Keeping your daily remote support life similar to how it was when you worked together in the same building can help your team maintain their service quality.

TEAM ● ○ ○ Basic

Klaus

Suggested by Merily Leis, Head of Marketing, Klaus

READ: 3 Steps to Prevent Low CSAT in Remote Customer Service | Klaus

66.

Invest in your team's internal documentation

Spend some time making sure your team have reliable and up-to-date documentation they can easily refer to. Tools like Tettra and Guru can act as a single source of truth, while also integrating into your other tools and existing workflows to make internal help docs available where agents need them.

TEAM

Intermediate

READ: How Customer-Facing Teams Use Tettra | Tettra

67.

Encourage friendly competition between agents and teams

Encourage a bit of friendly competition within your team to get agents engaged with KPIs. For example, Vend pits regional teams (Canada, UK & NZ) against each other with an informal monthly competition to see who can top leaderboards for certain metrics. The team with best results has cake bought for them by other teams.

TEAM

Intermediate

68.

Try team pairing to solve difficult problems

Pair programming is a common practice in engineering that can be easily apply to support teams too. At Geckoboard, 'pairing' is used for working through unusual situations such as uncommon billing requests. This encourages better decisions when dealing with something that is likely undocumented (or even unheard of before).

TEAM

Intermediate

geckoboard

Suggested by Luis Hernandez, VP Customer Success, Geckoboard

READ: What is Pair-Programming and why do we do it? | Jama Software

69.

Offer structured time outside the queues

There is more to customer support than just answering emails and phone calls. Having your team spend dedicated time working on projects outside the queue is valuable because it improves the Customer experience, and improves your team's skillset. Some common out-of-the-inbox projects include documentation, proactive support, team morale activities, and data analysis.

TEAM Intermediate

geckoboard *Suggested by Heather Jones, Customer Success Lead, Geckoboard*

READ: When working the support queue, less is more | FullStory

70.

Uncover the world of CX possibilities

Many agents assume that focusing their career development just within customer support puts them on a linear career path to management. That couldn't be further from the truth! Make sure your agents know about the huge range of possibilities in the wider CX world.

TEAM ●●○ Intermediate

tymeshift *Suggested by Elisa Reggiardo, CBO, Tymeshift*

71.

Improve search in your help center

Make it easier for your customers to find the article they're after, and get advanced reporting on what they're searching for, by setting up a robust search tool like Algolia on your help centre.

TEAM

Intermediate

READ: Site Search & Discovery powered by AI | Algolia

72.

QA score in agent incentive scheme

If you have an agent incentive scheme in place to reward excellent performance, make sure to include your agents' internal quality scores in their bonus calculations. Responsiveness, productivity and customer ratings are not enough. Add QA scores to get the full story and make your incentive scheme truly effective.

TEAM

Intermediate

Klaus

Suggested by Daniel Figueiredo, Operations Analyst, Klaus

READ: What's Your Customer Service IQS – Internal Quality Score? | Klaus

73.

Read The Service Culture Handbook

Build a customer centric culture with customer servivce at the heart. Check out The Service Culture Handbook, written for leaders wanting to align business strategy around the customer, with tips on training the team to approach customer interactions with empathy.

TEAM

Basic

geckoboard

READ: The Service Culture Handbook: A Step-by-Step Guide to Getting Your Employees Obsessed with Customer Service | Bookshop

74.

Build relationships with other teams

How isolated is your support team from other departments? Connections between support and product, marketing, and sales are extremely valuable to any business. Not only does support often require information from other teams to do their job effectively, support should also be considered a source of customer knowledge. Conduct lunch/coffee hangouts with members of other departments to become familiar with what they're up to, and share your own insights outside of your team.

RECOGNITION ●○○ Basic

75.

Regularly surface CS KPIs and emerging trends to the rest of the business

Use dashboards to surface your team's KPIs and increase recognition of their hard work. Showing how many conversations you're having with customers and the feedback you're getting reminds others in the organization why customer support is there and shows them a wider context of what is happening on the front line. Sharing live KPIs is easy with a dashboard like Geckoboard, which can be easily shared on Slack, in an email or presentation, or even displayed up on a large monitor or TV in your workspace.

RECOGNITION

Intermediate

geckoboard

Suggested by Luis Hernandez, VP Customer Success, Geckoboard

76.

Create a team dashboard

Having all your most important metrics in one place that agents can easily access means everyone can quickly understand what's going on, which channels might need attention then and there, and how the team as a whole is working towards its goals. It can also help others in the organization - who don't necessarily want to dig through a complicated report - instantly see how things are going in Support. Tools like Geckoboard can be set up in a few minutes, and integrate with all the major support tools to make visualizing and sharing your data easy and secure.

RECOGNITION

Basic

77.

Apply the Business Model Canvas

Support may be a department within a company, but consider running it as a mini business within the business. Be able to quantify and share the value you bring, how you will deliver that value, and what skills are required to meet your objectives. Once you have your strategy, make a plan to build your 'company' culture.

RECOGNITION

Advanced

Suggested by Jennifer Grant

READ: The Business Model Canvas | Wikipedia

78.

Offer work shadowing with other departments

One way to build better relationships between support and the rest of the business is to work on raising awareness for the work support does. A great way to kickstart this is to offer people in other departments a chance to shadow a support agent for a couple of hours a month. They'll get a glimpse into what customers ask about, and start to realize how much support knows about the product. As other employees get more comfortable with the support process, they can become a source of help to lean on during busy times.

RECOGNITION

Intermediate

About Geckoboard

Geckoboard is a software company that makes it easy for teams to build and share beautiful dashboards. Since 2010, we've been helping businesses put data at the heart of their culture and decision making.

We believe it shouldn't be difficult or expensive for businesses to access their data and visualize it in a way where everyone can understand what's going on. But with most of the solutions available – it is. Our aim is to level the playing field.

Trusted by 1000s of data-driven organizations

Thousands of organizations use Geckoboard to create dashboards that keep their teams focused on their most important performance metrics. Our customers come from a wide variety of industries, and range from newly funded fast-growth startups to established corporations with globally distributed teams.

Focus on the metrics that matter

Different teams measure success in different ways. Whether you're working to hit increasing sales targets, stay within budget or keep customer support response times low, Geckoboard allows you to select the most relevant data and visualize it in a way that makes sense to you and your team.

Less time chasing updates, more time on achieving outcomes

So much time can be wasted trying to access performance data. Understanding your business's current performance shouldn't mean spending hours digging around in different platforms and spreadsheets. Geckoboard's sharing features make sure key metrics get seen by the right people at the right time, so your team can spend less time sharing stats, and more time focused on strategy.

Better decisions, faster

Business leaders and teams work to make the best decisions they can based on the data they have at any given time. Making big decisions based on inaccurate or outdated data can be a costly mistake. Geckoboard's real-time dashboards mean that you have eyes on accurate performance metrics throughout the day and across timezones, so that you can action any undesired trends before they become serious issues.

Trusted by 1000s like:

HELLO FRESH airbnb BuzzSumo monday.com charlieHR

Build with best practice

Geckoboard's dashboard creator helps you quickly turn data from different sources into a professional-looking, customizable dashboard that always stays up-to-date. To make sure you make the most of your data and dashboards, we've built a comprehensive library of data literacy resources, goal-setting guides and practical platform how-to's. And if you get stuck, our dedicated support team's available to help – 24 hours a day, 5 days a week.

Data Sources

Geckoboard has pre-built integrations with 80+ data sources, so you can connect quickly and securely to your everyday tools – without coding.

Pull in additional data using spreadsheets, databases, Zapier integrations and our custom API.

- ActiveCampaign
- AirBrake
- Aircall
- Amazon CloudWatch
- Amplitude
- App Annie
- Appfigures
- Asana
- Baremetrics
- Basecamp
- Buffer
- Campaign Monitor
- Chargify
- ChartMogul
- Chartbeat
- ClickUp
- Close
- Copper
- Databases
- Datasets API
- Delighted
- Dixa
- Dotdigital
- Excel
- Facebook
- Facebook Ads
- Flurry
- Freshdesk
- Freshservice
- GitHub
- GoSquared
- Google Ads
- Google Analytics
- Google Calendar
- Google Sheets
- Gorgias
- Help Scout
- Heroku Dataclips
- Highrise
- HubSpot
- Instagram
- Intercom
- Jenkins
- Jira
- Klaus
- Klaviyo
- Linear
- LinkedIn
- LinkedIn Ads
- Mailchimp
- Make (Integromat)
- Mention
- Mixpanel
- Monday
- New Relic
- Orbit
- PagerDuty
- PayPal
- Pingdom
- Pipedrive
- Pivotal Tracker
- ProfitWell
- QuickBooks Online
- RSS Atom feed
- Recurly
- Redash
- RingCentral
- Salesforce
- SatisMeter
- SendGrid
- Shopify
- Spreadsheets
- StatusCake
- Stripe for SaaS
- TeamCity
- Trello
- Twilio
- Twitter
- Vimeo
- Wistia
- YouTube Analytics
- Zapier
- Zendesk Chat
- Zendesk Sell
- Zendesk Support
- Zendesk Talk

Don't see a connection you need?

Get in touch with our team and let us know. We're adding new integrations all the time.

Wins from Our Customers

At a glance, everyone in our organization can instantly see how we're doing. And it looks fantastic – large, easy to read, and intuitive!

—

Mike Johnson, President and CEO

LOCUS ROBOTICS

We have gone from spending a lot of time and effort creating charts in PDFs to communicate our financial data, to a dashboard that is easy to create, update and share. I'm excited to be able to share the information on our dashboard, and our board members love it!

—

Lakisha Miller-Barclay,
CEO

Rubber Division American Chemical Society

After looking at many different data visualization tools, I found Geckoboard to be by far the easiest solution to quickly pull together a single view of live metrics like number of people in the queue, number of open tickets, and CSAT score, and then share that across the business with a single link. It was so easy to set up using the built in data sources - it would take me around 30 minutes to build one for a client, and I could then just give them the keys to run it. It's easy to use and my clients loved it.
When I finished consulting, I took Geckoboard with me!

—

Logan Grooms,
Director of Customer Care

MAISONETTE

Geckoboard has eliminated the frustration of waiting for reports in order to make smart business decisions. Now we have access to live metrics and can act immediately to take advantage of new opportunities. It's reliable, it works, and it's worth every nickel.

—

John Andrews, Founder

WHERE YOU GO BESTPASS

We want to be as data driven as we can and dashboards allow us to share the right data with each team in the clearest way. Geckoboard ensures everyone can see their goals and work towards them.

—

Emiel van Lenthe, Chief of Marketing and Operations

Codator | Uw recht Uw expert

With Geckoboard, the dashboard is so clean and it's such an easy way to consume this data. I can even send it by text message and clients can pull their dashboard up on their phone in a breakfast meeting.

—

Kristian Marquez, Managing Director

FINSTRAT MANAGEMENT

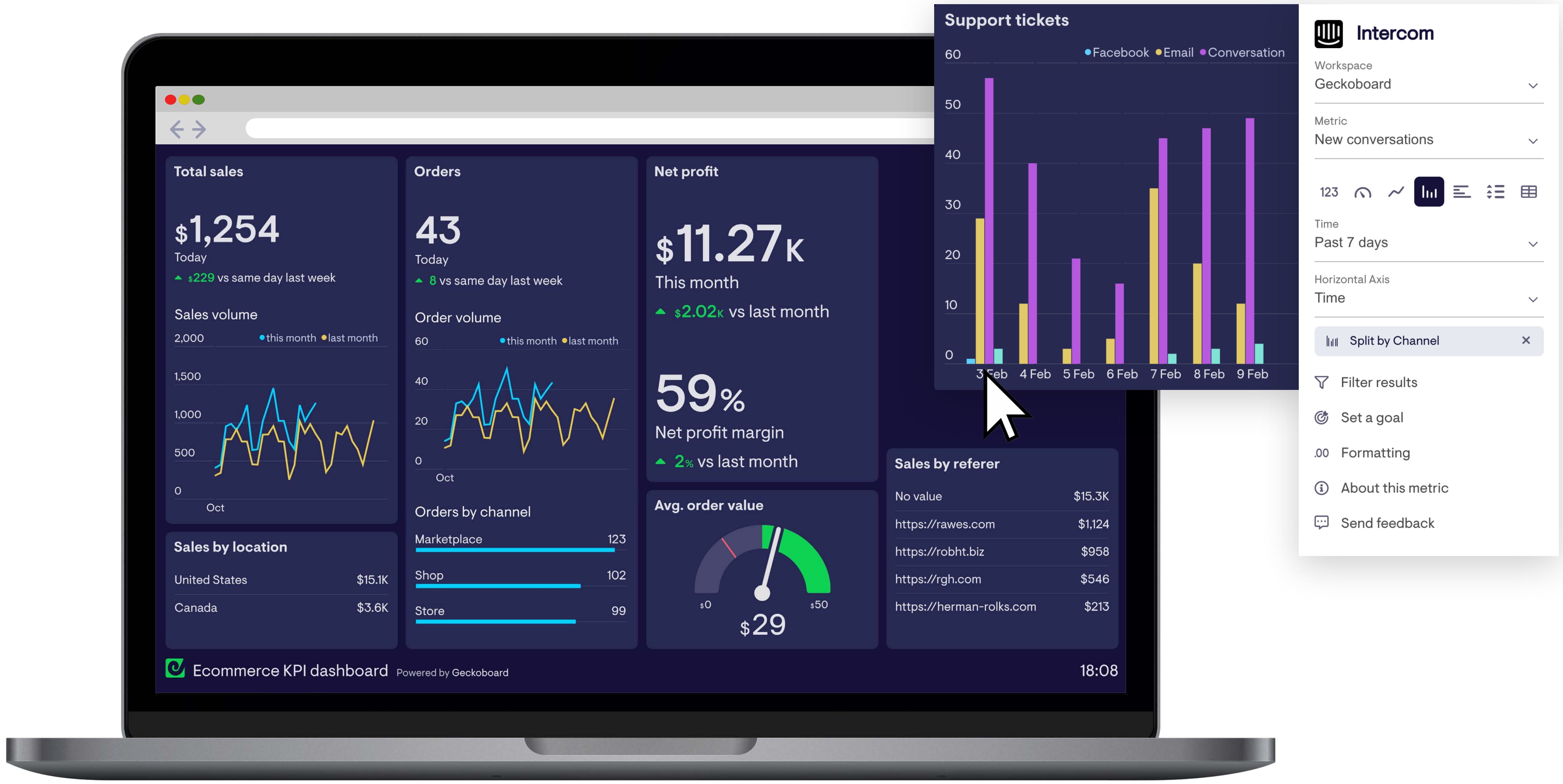
Clearer data. Better Customer Support.

At Geckoboard, we're on a mission to make it easy for Support teams to keep an eye on their most important metrics, so they can make better decisions faster.

Our dashboards enable customer service teams to build beautiful dashboards within minutes so that they can have a real-time view of what's going on in Support at any given moment.

Support leaders also love using our dashboards to develop happier teams by engaging their agents in some healthy competition and shining a spotlight on their hard work.

Create your Support dashboard within minutes, and keep an eye on your most important metrics from 80+ data sources including popular customer support tools like Zendesk, Intercom, Freshdesk, Help Scout, Klaus, Gorgias and Aircall.



Ready to supercharge your Support team?

Start with a
14-day FREE trial
by heading to
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Request a Demo:
https://bit.ly/3N0Jw8h

geckoboard

www.geckoboard.com