Winning Strategies for Email Management

An nGenera CIM White Paper

nGenera
CUSTOMER INTERACTION MANAGEMENT™

Over the last decade email has not only evolved into an entrenched medium for personal and business communications, it has also been widely adopted as a channel for customer service and support – with 92 percent of Web sites offering email for customer support. Apart from Web sites, organizations also provide customer service email addresses on their brochures, annual reports, products, packaging, and other corporate communications.

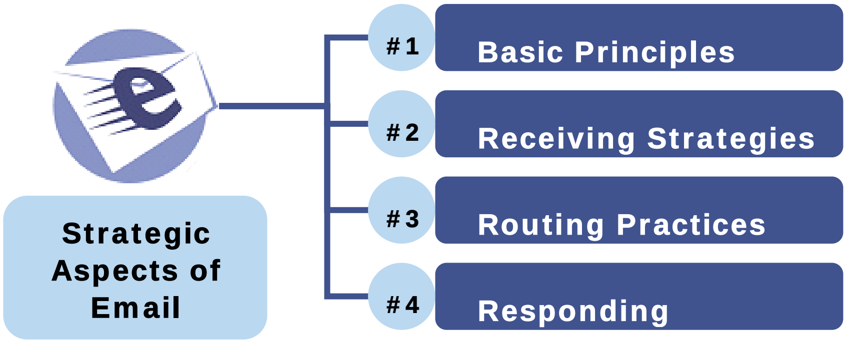
With the steady growth in inbound email volumes, organizations are increasingly faced with the challenge of not only responding to their customers in a timely manner, but actually resolving customer issues via this medium. Failure to do so means higher customer service costs using traditional channels, like phone support, as well as reduced customer satisfaction. In many cases, email is the first interaction with an organization. The quality of this first touch point can be critical to external perception.

As organizations grapple with this challenge, customers are expecting email response times to grow shorter and shorter. Ninety percent of customers expect a response within 24 hours or less, while 58 percent expect a response within 12 hours or less. Furthermore, high-value customers prefer email over the phone channel and are 2.4 times more likely than low-value customers to use email for customer service.

With firmly entrenched customer expectations when it comes to having an email option for customer service, it is the organization's responsibility to leverage the cost-effectiveness of email while exceeding customer expectations. Successful email management results in increased customer satisfaction, improved agent efficiency, and reduced operational costs. This white paper suggests key winning strategies for providing an exceptional email customer service experience.

Four strategic aspects of email management

The various best practices, strategies, and techniques for effective email management can be classified into four areas—basic principles, receiving strategies, routing practices, and responding techniques.



Basic principles include fundamentals that apply across all aspects of successful email response management. The other three aspects include best practices at each step of the email workflow—receiving the email, routing it appropriately, and responding to it in a timely and relevant manner.

#1: Basic Principles

An effective email management strategy should be guided by a clear set of basic principles. An organization has to understand the need for an appropriate email management system to manage customer emails, be aware of the overall multi-channel nature of customer service, set internal objectives and SLAs, and acquire executive sponsorship and funding.

Ground rule: Always respond

A delayed response is not desirable, but is always better than not responding at all. The ground rule is to always respond to every customer email that requires a response. It is important to clearly identify email that may not require a response (like a “thank you” note) as well as email that may just require a single automatic acknowledgement (like customer service questionnaires, responses to promotions, or RSVPs). Document this basic principle as part of the internal service objectives, and use functionality available in email management systems to configure alarms as well as notifications when emails remain unanswered for more than a specific period of time.

Invest in an email response management system

If the organization currently has or is thinking of using an email client like Outlook, Notes, or Thunderbird to manage customer emails, consider investing in a specialized email management application.

According to Jupiter Research, “Companies that deploy email automation solutions are able to handle at least 54 percent more email inquiries per hour than those with custom-built applications, and 63 percent more inquiries per hour than companies using business applications.”

Although the likes of Outlook are effective for managing one’s personal and business emails, they lack a large set of critical features required to effectively manage customer queries, including the concepts of departments and queues, intelligent routing, agent productivity tools such as preconfigured responses and shortcuts, personalization tools, knowledge base integrations, customer service metrics, and many more. Unless these features are leveraged, chances are it will be a constant struggle and a losing battle when it comes to meeting response expectations and ensuring customer satisfaction.

Keep an overall multi-channel strategy in mind

Any customer service strategy should consider the various traditional as well as the more recent communication channels—phone, email, online chat, self-service, and Web collaboration. For effective customer service, it is imperative to provide cohesive and consistent service across all channels. Even if it is planned to implement just an email solution at this time, ensure that the system either offers other channel modules in a pre-integrated fashion or allows for easy integration with other applications.

An integrated offering will ensure the lowest total cost of ownership (TCO) by providing out-of-the-box features, such as unified customer history across channels, an integrated knowledge base, multi-channel routing, and cohesive analytics.

View email differently from phone

Responding to emails requires a different set of agent skills and system features than when compared to answering phone calls. For example, email agents should be good at reading comprehension and written communication, as opposed to listening skills and voice accents in the case of phone agents. Multi-tasking is also an additional skill set requirement. Agents will often handle multiple channels, such as phone or chat.

From a system standpoint, immediate and real-time access to customer data is useful for improved email agent productivity, but is not as critical as in the case of phone (since the customer is not holding the line on the other end). Reporting is also impacted as agents might manage more than one email at a time, while phone agents usually only handle one customer at a time. Consider these differences between phone and email communications when selecting an email management system as well as staffing customer service teams.

Ensure executive commitment & sponsorship

Acquire ongoing executive commitment and sponsorship early in the process of implementing an email management system. Identify two or more senior executive sponsors, as selecting a single individual may leave you vulnerable in case that person leaves the organization. Work with the email management vendor to present case studies and success stories to the executive team. Secure adequate funding for at least the first phase of the implementation with guaranteed continuous funds (which could be based on meeting predetermined first-phase objectives). Executive sponsorship and adequate funding make email customer service a tangible initiative with a real chance at success.

Establish objectives and Service Level Agreements (SLAs)

Consider current email response processes and historic data to establish internal goals, as well as clear service level agreements. In the case of just starting off or not being sure about meeting objectives (for example, at least 90 percent of the time), consider using statements like, “We endeavour to respond to all emails within 24 hours and, at the latest, within three days.” However, remember that more and more customers are expecting faster email response times. If a customer is told that it will take 72 hours to respond and their requirement is less, they will immediately escalate to another interaction channel, such as phone. Standard customer expectation is a 24 hour response time, but only 46 percent of companies answer within this time period. Establish realistic SLAs and set expectations upfront. If possible, communicate these to customers on the Web site.

#2 Receiving Strategies

At the outset it may seem that organizations do not have any control over how they receive emails. After all, if there is an email address published, the company will receive mail. However, significant productivity gains can be achieved, response times decreased, and even email quantities reduced by utilizing strategies to determine exactly how to receive customer emails.

Have an “Always Open” policy for receiving emails

Email is not a real-time communication channel and does not require a customer service agent to be present on the other end at all times. Hence, regardless of agent availability or working hours, customers should be able to write at any time, all the time. Organizations may choose to modify SLAs and set different expectations during peak holiday seasons or new product launches, but consider “closing” the email option only in extreme scenarios like a system failure or a natural disaster.

Originate via Web pages instead of direct email

It was initially fashionable, and then it became a common practice, to include generic email addresses (info@acme.com, support@acme.com, feedback@acme.com) on all company communications, product packaging, shipping boxes and labels, and brochures. Consider changing these email addresses to Web page links (www.acme.com/info, support.acme.com, www.acme.com/feedback). Many companies benefit from a Web form as opposed to a direct email, as they can control the email address to where responses should be sent and a Web form will speed up responses.

Customer requests can be managed better if they come via Web forms filled out on the Web site. However, note that all email addresses should be removed only if the nature of the business is completely online or if other channel choices are provided. Consider originating email via Web forms as part of the overall multi-channel customer service strategy.

Design smart email Web forms

Create simple and effective email Web forms by using appropriate category and subcategory dropdown options, check boxes, radio buttons, and space for the customer to type free-text. Avoid asking the customer to select a priority or a severity (as that will typically result in only the highest option selections). The golden rule of three fields applies: try not to ask more than three questions in the Web form.

Provide self-service options around the email Web form, including the top five or ten frequently asked questions (which could be dynamically presented based on category selection). If the customer can be identified using cookies or a log-in process, personalize self-service options based on customer value, recent purchases, and past history. If not, capture parameters such as customer email address or order number to identify the customer at a later stage.

Utilize Web form “preview before submit” features

Instead of having a “submit” button under the email Web form, use a “next” button to first present a preview to the customer with options to cancel, modify, and submit on this preview page. Not only will it allow the customer to cross-check and modify the message if required, it will also help to identify the customer using information they enter on the first form page. Use tools such as a Natural Language Processing (NLP) engine to present additional (and more relevant) self-service options on the preview page.

Presenting a preview page also provides an avenue to set modified expectations if the problem is particularly critical or complex, and include links to other channel options such as online chat, a Web call-back request, or even a specific phone number for a high-value customer.

Manage SPAM and other unwanted emails

Use specialized SPAM filtering software or features available as part of commercial email servers to minimize the number of non-customer emails that actually arrive in the email management system. In case the email Web forms are targeted by malicious crawlers or bots that overload the email system with automatically generated Web form emails, consider using techniques like CAPTCHAs—the customer is requested to decipher the letters in a distorted image in order to submit the Web form.

Also use the required anti-virus tools to scan all incoming email as well as attachments for potentially harmful viruses. Do not categorically block these emails, as they could be from legitimate customers. Instead, tag them separately and create rules to automatically inform the sender that their email had a virus and could not be opened.

#3 Routing Practices

Specialized email management systems offer sophisticated features that enable an organization to route incoming email messages using a wide range of parameters. Email can be routed into queues, automatically escalated or sent to a different department, routed based on agent workload, delivered to a particular agent, and more. Although routing rules and configurations will depend on specific organizational processes, apply relevant best practices to optimize the routing strategy.

Keep routing logic as simple as possible

Most email management applications make it simple to configure routing rules via an intuitive administrator user interface. While this is essential, ad-hoc creation and modification can result in interdependent and conflicting rules that may cause havoc as opposed to improving productivity. Hence it is important to keep routing rules and logic as clear and straightforward as possible.

Instead of directly configuring routing in the email management system, first document it in an up-to-date Routing Document using “If-Then” logic. (For example, “If the email has this, then do that.”) Analyze new rules and modifications to ensure that they do not conflict with any existing rule or potentially create a cyclical loop. Utilize features available in most email management systems to test routing rules for potential conflicts and cyclical logic.

Use system permissions to control access such that only selected administrators can create and modify routing rules. Ensure there are at least two individuals at any time who are well-versed and capable of administering all routing aspects, and mandate clear and up-to-date documentation.

Route based on departments and queues, not named individuals

Individual agents go on vacations, fall sick, show up late, or leave the organization. Routing logic directly based on individual agents will result in email that either remain unanswered or have to be manually moved from one agent’s inbox to another. Create appropriate queues or mailboxes, as well as roles and departments, and first configure rules based on these parameters. Routing should always be based on the “best available agent” as opposed to a predetermined, named agent like “John Doe”.

Within a particular queue or mailbox, employ automatic push-routing based on agent workload, departments, and other relevant parameters. This will ensure that certain agents cannot cherry-pick the easy emails or return more challenging queries back into the queue for someone else, and so on.

Use customer information for intelligent routing

Provide priority service to high-value customers by utilizing customer information when routing a particular email. Customers can be identified using information gathered via the email Web form, the incoming email address, or via intelligent email content scanning. Use information stored within your email management system or an external CRM system as criteria to use within your routing logic.

Configure and utilize agent skills to increase FTR rates

If the company has a wide range of products and services, and appropriately skilled teams in various areas, configure skill-based routing to send the incoming email to the appropriate team and then to the best available agent. This will directly result in improved First Time Resolution (FTR) rates as agents will not have to spend valuable time reading, understanding, and transferring email to different queues. Furthermore, email will not just wait in the wrong queues while valuable SLA time is lost.

If the company has a multi-lingual customer base, ensure that the email management system can automatically identify incoming email languages and then route them appropriately to service lines and available agents who have the required competency to respond in that particular language.

Automate escalation routing and exception scenarios

Routing does not just apply to incoming email, but also to email that might have already been routed once. Agents might transfer emails to other service lines or teams, or might even return them to the queues, if allowed. However, as email volumes increase, often certain inquiries remain unanswered for longer-than-desired periods. Configure routing rules to prioritize such email, based on individual email SLAs, and push them to special mailboxes or escalate them appropriately.

Utilize routing functionality to tackle exceptional scenarios, such as an email getting transferred by agents multiple times, or an email getting transferred back and forth between the same mailboxes.

#4 Responding Techniques

Receiving customer email and then routing them appropriately (and intelligently) covers the basic prerequisite for effective email management. Respond times and what information is included in the response are two key factors that determine successful customer service. Responding techniques include using effective auto-acknowledgements, personalizing responses, keeping the customer informed, and using agent productivity tools as well as an integrated knowledge base.

Use effective automatic acknowledgements

Although an auto-acknowledgement is rarely adequate as a response, it can be used effectively to inform customers that their email has been received and also to avoid getting repeat email from the same customer on the same issue. Apart from this basic task, acknowledgements should be personalized based on customer information (if available), and is also an ideal mechanism for setting customer expectations.

Include any issue tracking number or case ID, establish SLAs based on customer value or problem complexity, and provide information about any service delays or outages as part of the auto-acknowledgement. Outline options for self-service or, if needed, provide escalation methods for emergencies.

With a variety of SPAM filters working on most email systems, do not use strange or obscure email aliases like auto-ack@acme.com or ack-response@acme.com. Clearly mention whether or not the customer can reply to the acknowledgement. Thread any such response into the original email within the email management system instead of creating another separate issue or case.

Personalize responses and keep them simple

Starting with the acknowledgement, personalize every email by including the customer name in the greeting, the agent's signature, and other pertinent customer information. Utilizing Web forms that ask for first and last names will help automate this process. Respond to the query directly and as completely as possible with existing information. However, keep the response short and to the point. Avoid heavy formatting and do not include unnecessary HTML and graphics. Do not attempt to up-sell, cross-sell, or use other marketing techniques unless the customer issue has been resolved.

Always keep the customer informed

Apart from the first acknowledgement, it is also a good idea to keep the customer informed of progress, particularly delays. If the stated SLA is a 24-hour response and you are not going to meet it, customers will typically allow additional time—provided they are informed that their problem is being worked on. Depending on email volume, employ automated rules or have agents respond with a personalized note. In either case, mention the nature of the delay and the expected resolution time.

Empower agents with productivity tools

Email management systems provide value and lower total cost of ownership due to a large set of features, including agent productivity tools. Train agents to use them effectively. Such tools include automatic spell-checking in multiple languages, ability to personalize messages using templates for various parts of the email (like header, greeting, body, footer, etc.), ability to preview emails, use pre-configured responses, insert knowledge base articles, use short-cut keys, and many more.

Consider auto-suggest and auto-response capabilities

Consider investing in intelligent tools that can scan email content, understand the specific request, and suggest appropriate responses to an agent or even automatically respond to the customer. Use automated responses when email has been received via a structured Web form and when there is a high degree of confidence in the response accuracy. Access the specific service organization and decide on an acceptable degree of error (for example, five percent of all automatic responses) based on the value of a customer segment and the volume of incoming email.

Utilize the power of an integrated knowledge base

An integrated knowledge base is a powerful tool to provide consistent, relevant, and quick email responses. It can also be used for other customer service channels such as self-service, online chat, and phone. Empower agents to author new knowledge base articles and modify existing ones. Use access control and approval workflow to leverage agent knowledge while ensuring quality and consistency across the customer service organization.

Be selective in sending follow-up emails

From the customer's perspective, the only thing more annoying than an unresolved service request is an unsolicited follow-up email asking for feedback. Many organizations take the notion of following up every customer query resolution literally. This costs time and money, and most customers ignore it, respond with irrelevant or wrong data, or even worse, mark the email as SPAM.

The best service resolution metric is whether or not the customer contacts the company again for the same problem, especially via a different channel (usually the phone). Use follow-up or feedback emails in cases where resolution was delayed or might have been poor, and consider combining it with a promotional offer or a gift certificate.

Employ quality assurance techniques

As with personal email, there is always the possibility that an agent will realize an error or omission after hitting the send button. Use the Outbox feature available in most email management systems to keep outgoing emails for a specific period of time before they are actually dispatched. This will allow agents to pull email back and modify them. Create quality assurance processes where team leads, subject matter experts, and supervisors monitor email responses for quality on an ongoing basis, improve the knowledge base content, and review agent performance. Automate this process by designating a certain percent of email blind-carbon-copied to a quality assurance mailbox.

Improving Ongoing Email Management

As with any other ongoing process, it is critical to gather metrics, measure performance, and make continuous improvements to the overall email management initiative. Real-time statistics present a live snapshot of the system and agents—number of emails in queues, number within service levels, agent workload, response times, and more. These are essential to monitor ongoing activities and take immediate preventative or remedial action. Historical metrics should be gathered and analyzed to determine trends, identify issues, evaluate agents, determine staffing levels, and escalate product or service problems to other departments in the organization.

Given the multi-channel nature of customer service, it is important to look at the holistic set of metrics related to all the channels offered—self-service, phone, email, and online chat. Utilize the success of an initial email management initiative to deflect customers from more expensive channels, such as phone, to email.

Pay specific attention to ongoing performance versus published SLAs. Metrics gathered should help not only track past performance, but also predict future performance. Monitor trends associated with specific organizational events, such as new product releases, product recalls, marketing promotions, and holiday seasons. Make ongoing corrections and instil a continuous improvement process around the entire multi-channel customer service strategy.

About nGenera Customer Interaction Management (CIM)

nGenera Customer Interaction Management is the global leader in *next generation* customer experience solutions. Customers report increased customer satisfaction and measureable cost savings within six months of deployment. With 250% customer growth over three years, more companies trust their customer experiences to nGenera Customer Interaction Management. Customers include Royal Bank of Canada, Saks Fifth Avenue, Cannon, BMW, Dell, eBay, Epson, Ford, Microsoft, Scottrade, Siemens, Sony, and Sprint.

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