

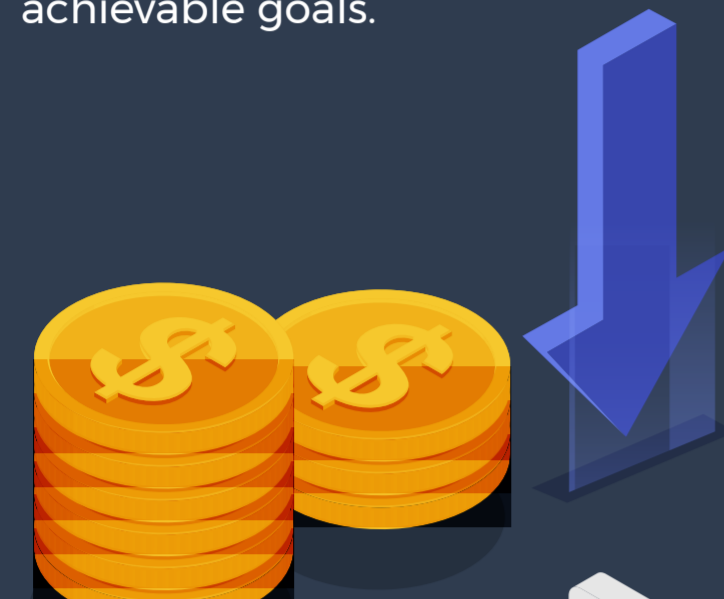
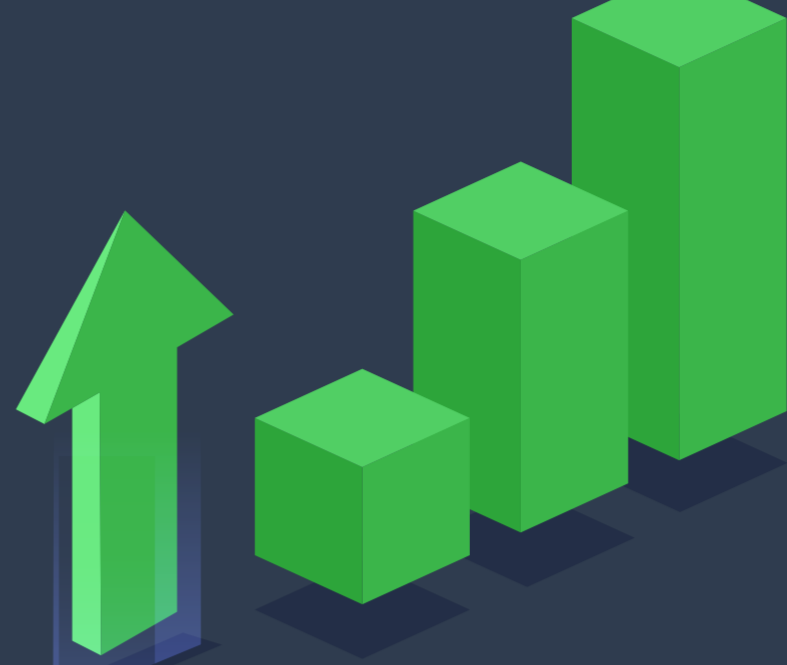
6 Steps to Get Started

with Messaging-Based Customer Service



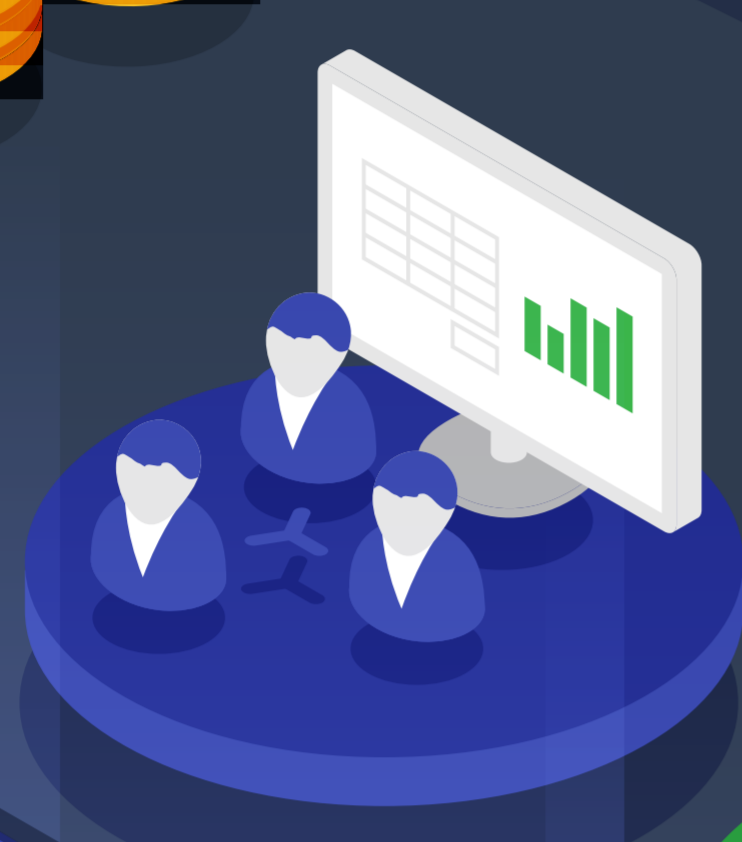
1 Identify Business Objectives

In order to justify messaging as a primary channel, larger business objectives need to be identified alongside a clear path to success. Aiming for higher customer satisfaction, lower costs and increased conversions are both solid and achievable goals.



2 Group and Train Agents

Agents can be grouped by geographic location, function (Operation, Billing, Fraud, etc.), outsourced partner companies, skill or language. This ensures that issues are resolved by the most qualified agent with minimal transfers.



3 Set Up Knowledge Base

One of the core benefits of messaging-based customer service is the ability to offer effective self-service that encourages users to resolve issues on their own. This requires a fully optimized and updated knowledge base to be successful.



4 Set Up Workflows and Automations

If there are more than a handful of agents, the support team leader needs to configure workflows so that issues are triaged, routed and resolved as efficiently as possible. Bots and automations can be used at this stage.



5 Roll it Out to a Small Audience

Start small, as volume and errors may be unpredictable initially — it's more important to prioritize a great user experience first and foremost!



6 Monitor, Learn and Expand

During the initial weeks or months after launching, it is important to maintain an understanding of how customers are reacting, while also keeping tabs on operations.

