



E-BOOK

# Enabling Customer Service Success

In an Omnichannel World



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## Meet our Industry Experts



### **Mike Aoki**

*President*

Reflective Keynotes | [reflectivekeynotes.com](https://reflectivekeynotes.com)

As a contact center expert, Mike serves on the Advisory Council of GTACC (the Greater Toronto Area Contact Centre Association) and was Master of Ceremonies for five of their annual conferences. He has also been named to ICMI's "Top 50 Customer Service Thought Leaders on Twitter" for the past four years.



### **Jason Aydelott**

*Director of Learning & People Development*

American Customer Care/Premiere Response  
[premiererresponse.com](https://premiererresponse.com)

Jason has been building engaging training solutions for companies in various industries for more than 20 years. Always striving for innovation, Jason has helped guide companies as they modernize their learning departments by evolving from purely instructor led training to blended learning environments.



## Meet our Industry Experts



### **Angel Brockbank**

*Director of Customer Experiences*

Chatbooks | [chatbooks.com](https://chatbooks.com)

Angel started working for Chatbooks at the start of the company, in 2014. Her entire team works remotely answering emails, live chats, and phone calls for thousands of happy Chatbooks customers every day. Her number one goal is ensuring that her team feels recognized, appreciated, and empowered to offer their best selves in all that they do.



### **Ben Collet**

*Director of Global Advocacy, Enterprise & Strategic Accts.*

Zendesk | [zendesk.com](https://zendesk.com)

Ben has spent 20 years in the world of technical support and customer service. He has led corporate support teams at Compaq, Gateway, and Teleperformance USA. In 2011, he entered the SaaS industry by joining Zendesk, which builds software for better customer relationships.



## Meet our Industry Experts



### Jeff Toister

Author, Founder

Toister Performance Solutions, Inc. | [toistersolutions.com](https://toistersolutions.com)

Jeff is the best-selling author of *The Service Culture Handbook: A Step-by-Step Guide to Getting Your Employees Obsessed with Customer Service*. More than 140,000 people worldwide have taken at least one of his courses on LinkedIn Learning (a.k.a. Lynda.com).



### Karen Riddell

Associate Manager, CX Training & Communications

Warby Parker | [warbyparker.com](https://warbyparker.com)

Karen has been with Warby Parker since 2012 working her way up from an intern to the Associate Manager of Training and Communications for the Customer Experience team. She currently works across two offices managing all training for a growing team and ensuring customer-facing communication is both informative and enjoyable.





**Empowering customer service employees really means enabling them to provide outstanding customer service.**

**Jeff T.**

Toister Performance Solutions, Inc.






# Empowered Reps & Customer Experience

Customer experience is quickly becoming the number-one competitive advantage and a proven driver of long-term growth.

While many companies recognize the importance of great customer service, leaders are often overwhelmed with the different processes, tools, and strategies that impact the customer experience. So, what are the most efficient and effective ways to improve customer service? The answers lie with those who are interacting with customers on a daily basis—customer service representatives.

Whether a customer interacts through voice, chat, video, or social media, their experience is largely driven by the rep on the other end. Reps who feel more valued by their company are more motivated to resolve customers' problems, more engaged in their role, and more willing to increase their knowledge and skills. In return, their level of customer service skyrockets, effectively boosting both team and company performance.



**Highly engaged teams achieve, on average, a 10% increase in customer ratings and 20% increase in sales.**

**10%**  
increase in  
customer ratings

**20%**  
increase in sales

Gallup

# Empowered Reps & Customer Experience

Despite the direct correlation between rep engagement and performance, most organizations fall short in rep enablement. For truly great customer service, leaders need to create an environment that supports reps and truly empowers them. According to a report by [Talkdesk and CCW](#), reps are faced with numerous challenges that impact their engagement and performance, including:

## Poor training and lack of knowledge:

A truly enabled rep receives continuous training and has access to the knowledge they need to resolve customer problems quickly and accurately.

## Unclear metrics:

Empowered reps also have a clear understanding of the metrics and KPIs their organization is using to measure performance on both individual and team levels.



## Standards in new channels:

As contact centers continue to expand to a number of new channels, enabled reps have the right tools to provide a consistent customer experience, on any channel, at any time.

The good news? This guide features tangible ideas that leaders can take with their people, processes, and technology to truly create enabled teams.



# The Benefits of Enablement

"For empowerment to work, it often means that agents are going to be doing work that doesn't have the same measures, that agent profiles need to be updated, and that a larger or more intentional training investment needs to be made."

**Ben C.**

*Zendesk*



**Increased Productivity**



**Reduced Churn**



**Improved Service Level**



**Lower Operational Costs**

# Enablement Idea #1: Transform Training

As customer needs and preferences continue to evolve, it's important to realize the critical role that training plays in the customer experience. At a time when customers value correct answers, fast resolutions, and effortless interactions, customer service leaders need to equip reps with the skills they need to meet—and exceed—expectations.

For most modern customer service teams, training is usually provided through a combination of classroom training, online learning, and some peer-to-peer experiences to get reps up-to-speed. The most successful customer service teams go beyond this standard training playbook to deliver continuous training that focuses on both technical knowledge and personal skill development. Increasingly, teams are starting to realize the benefits of this reimagined formula for training.

**60%**

of companies plan to improve customer service training in the next year.

**CCW Performance and Metrics Study**



# Enablement Idea #1: Transform Training

## The Impact of Omnichannel

Truly empowering reps means equipping them with the skills to provide a consistent experience on any channel, at any time.

**2/3<sup>rds</sup>**

of organizations have reps who are multi-skilled across channels and skill types.

**CCW Performance and Metrics Study**

When we asked our customers how many service channels they offer, 90% of respondents have more than doubled their channel offerings in the last 5 years, with the majority categorized as self-service channels. Industry leaders also point out that they expect this trend to rise.

**There is a trend toward more self-service channels, especially with millennials. As machine learning becomes more accessible, AI-driven chats, texts, and emails will be more prevalent.**

**Jason A.**

American Customer Care/Premiere Response

# Enablement Idea #1: Transform Training

The growing popularity of self-service channels means that customers are turning to these channels for simple, transactional interactions. When it comes time for a customer to reach out to a rep, it's likely because they couldn't find an answer via self-service. Therefore, the interactions tend to be more complex, unique, and unpredictable. To adapt, leaders need to provide reps with upskilling opportunities that prepare them to handle higher-effort interactions.

**With more complex work, you absolutely need to identify and train on new skills. First, get a good inventory of the skills your customers need and then take a look at your workforce to see what skills they already possess. Then, provide courses and training for skills that are in demand.**

**Ben C.**  
Zendesk



# Enablement Idea #1:

## Transform Training

In addition to training reps to handle more complex interactions, leaders should also provide adaptive and consistent training that prepares reps to tailor conversations and handle interactions across chat, email, and phone. From navigating across systems, to working with specific channel technology, it's important for reps to receive training that allows them to evolve across channels.

While some customer service leaders are more inclined to assign reps to work with just one channel, forward-thinking teams empower their reps to feel confident working on any channel. This strategy maximizes the performance of the entire customer service workforce, as reps are prepared to work on any channel, depending on interaction volumes.

When we asked our customers how many service channels they offer, 90% of respondents have more than doubled their channel offerings in the last 5 years, with the majority categorized as self-service channels. Industry leaders also point out that they expect this trend to rise.

**[Omnichannel enablement] creates higher productivity. When one channel is slow, your team and agents can work on other channels. It also reaches every type of customer based on their preference.**

**Angel B.**  
Chatbooks



**Many contact centers inexplicably fail to forecast volume for non-phone channels such as email, chat, and social, so they can ensure those channels have adequate staffing. Agents serving those channels are frequently undertrained. And many contact centers fail to monitor and coach customer interactions on non-phone channels.**

**Jeff T.**

Toister Performance Solutions, Inc.







**The biggest mistake companies make with their strategy is trying to convert every voice agent to omnichannel. Verbal and written skills are very different. Just because someone is good over the phone does not mean they can handle written customer service. Train them how to write properly for live chat and social media.**

**Mike A.**

Reflective Keynotes



## Enablement Idea #2: Equip Excellently

While skill-based training is vital to rep success in an omnichannel environment, they also need to be equipped with important knowledge around their company's processes, products, and services. Because of the speed of business and rate of change, customer service leaders should provide ongoing support around these initiatives.

**We are launching a lot of new products.  
So, we'll need to support the team  
consistently through all of that.**

**Karen R.**  
Warby Parker



## Enablement Idea #2: Equip Excellently

Beyond training on products, processes, and services, reps also want on-demand access to information in their moment of need. Because employees tend to [forget 90% of what they learn within one week](#), it's helpful to give reps a way to revisit and review information when and where they need it most—during customer interactions. When reps don't have instant answers, they can't help customers quickly. Instead, they spend extra time and effort trying to find answers while the customer waits. This reduces customer satisfaction and increases rep frustration—decreasing both job satisfaction and team performance.

# 20%

McKinsey & Company

The average worker spends nearly 20% of their work week looking for internal information.



# Enablement Idea #2:

## Equip Excellently

Great organizations empower their reps with seamless access to content in their time of need. By providing a central, searchable hub of relevant and accurate content, reps can focus on the task at hand. Rather than turning to a colleague or supervisor for ad hoc information, reps become self-reliant, confident problem solvers.

For many leaders, it's a struggle to identify the areas where their teams need additional knowledge and support. Instead of relying on only a few team members to develop training content, forward-thinking leaders work with reps that are subject-matter experts to crowdsource information. Because they are frontline reps, these teammates can identify and deliver the content their team truly needs most. This process not only fosters employee engagement, but it also empowers reps to share best practices and helpful tips with their entire team for improved performance.

Together, excellent internal knowledge management and thoughtful training have the power to cultivate high-performing reps who have the right information at their fingertips and the ability to serve any channel well.

**Actually enabling people who have the right skills and knowledge to assist others is another major way you can engage your team and prepare them.**

**Ben C.**  
Zendesk



**Customers hate hearing different answers from different agents. Once you lose your customers' trust, they start playing customer service roulette. They call and call again until they hear the answer they want because they know someone will slip up.**

**Mike A.**

Reflective Keynotes





**Knowledge-centered sharing, or knowledge-centered support, really started off as a theory. Now, it's standard methodology, and so many people in the industry are recognizing it's key to delivering great customer experiences.**

**Ben C.**  
Zendesk



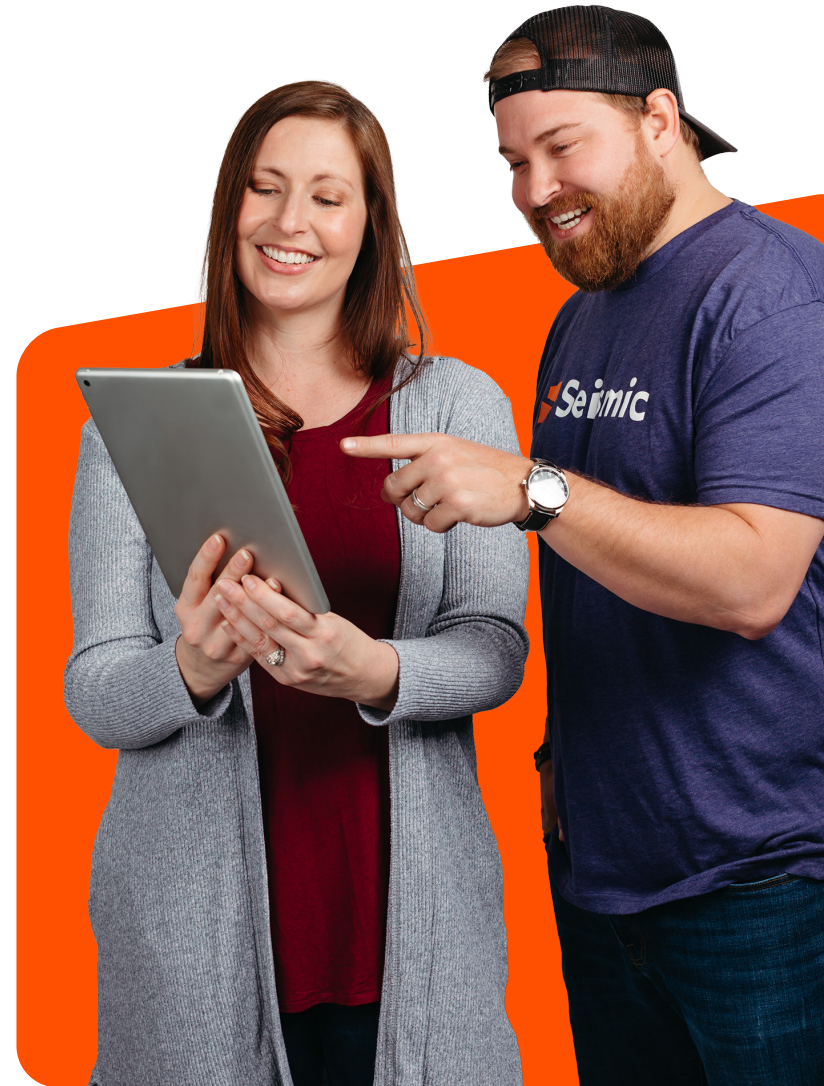


## Enablement Idea #3: Measure What Matters

While training and access to essential knowledge are crucial to rep enablement, leaders also need to provide customer service teams with clear metrics. While this is nothing new for customer service leaders, many are still focusing on antiquated transactional metrics that fail to correctly measure performance in an omnichannel environment. As the customer journey changes, it's important for customer service teams to also change how they measure success.

**The customer experience is built for change. If you're not adapting to your customer's experience, then you're lagging behind. One of the best ways to know that is looking at your measures and asking if they're still helpful, actionable, and linked to today's goals.**

**Karen R.**  
Warby Parker



# Enablement Idea #3:

## Measure What Matters

### New Approaches

As contact centers evolve to offer more service channels, they need to establish and track new KPIs that accurately measure value, and performance success, across the entire customer journey. Here are just a few tips to consider when choosing the best KPIs:

#### Look at qualitative and quantitative metrics

Traditionally, customer service teams were focused on quantitative, transactional measures, such as average hold time and number of resolutions. While these are still important, omnichannel support presents leaders with the opportunity to apply new KPIs that focus on the specific resolution rates for each channels, every rep, and the entire team.

**The biggest mistake companies make is not having a strategy. They look at channels as individual pieces and never consider the customer's journey.**

**Jeff T.**

Toister Performance Solutions, Inc.

# Enablement Idea #3: Measure What Matters

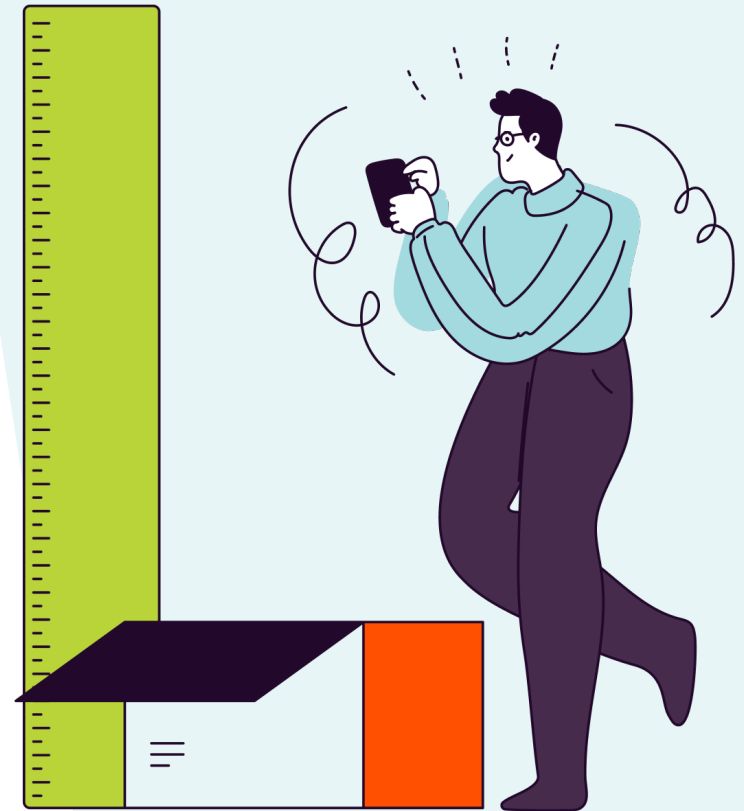
## Measure in context

According to [CCW's Omnichannel Report](#), 57% of companies have different KPIs for different channels. However, it's crucial to measure these channels together and in context to see how customers are receiving service.

By taking a new approach to KPIs, customer service leaders can better review how their reps are performing across every service channel. This will help them identify gaps of service and pinpoint areas for improved training and enablement.

**There's this misconception that higher interaction volumes are bad, but it can be positive traffic. It may mean people are branching out and trying new channels.**

**Ben C.**  
Zendesk





**By making performance measurements a team goal, you shift the paradigm from individual, often siloed work—where individuals are trying to competing to hit quota—to a team collaboration. So now, if a rep sees a teammate struggling on an issue, they're incentivized to help them.**

**Ben C.**  
Zendesk



# Important Things to Consider

While training, access to knowledge, and performance measurement are key to empowering agents, forward-thinking teams also provide their reps with:

## Autonomy

Meaningful autonomy means giving reps the freedom to resolve customer needs and provide the best service possible—at their own discretion. Establish a solid framework with general guidelines to ensure reps make the best decisions for the organization and customer.

## Feedback

Feedback through coaching and mentoring is an effective extension of customer service training. Give reps the chance to gain more hands-on knowledge and reinforce best practices from their leaders. This investment will motivate them to do better work and put new skills to use.

## Vision

Without a true understanding of how their actions impact the entire company, reps are unlikely to feel empowered to take the organization to the next level. Create a shared vision of service for reps to go the extra mile and bring the vision of an amazing customer experience to life.

## Tools

Enabled reps don't necessarily need more tools—they need improved ones. Provide reps with software that allows them to quickly and seamlessly switch between channels and access relevant knowledge when they need it.





**One of the biggest misconceptions is that empowerment takes too much time. While it's true that empowering your reps can take some extra training and monitoring up front, empowered reps will save time in long run. They'll do the right thing more often without having to get their supervisor involved.**

**Jeff T.**

Toister Performance Solutions, Inc.







**Take a look at the whole operation including people, processes, and technology. If you have a workforce that really is empowered, you truly have a balance of all three of these things. If not, it will lead to disempowerment, and you'll crush your agents and fail to meet the demands of your customer experience.**

**Ben Z.**  
Zendesk



# Getting Started on the Path of Empowerment

World-class organizations have an enablement plan that equips reps with the confidence and readiness to deliver better outcomes. A thoughtfully designed plan starts with a strategy and ownership.

**Start with these three items:**

## Goals

What do you want to accomplish with this enablement plan?  
What metrics or business outcomes match these goals?

## Themes

What are the primary things each rep needs to know to be great at their job? For example, outline key information around products, company policies, and how to use the support tech stack.

## Responsibilities

What content needs to be developed to address key themes. Identify deadlines, who needs to create and update it, and follow-up on deliverables.





## About Seismic

Seismic is the global leader in enablement, helping organizations engage customers, enable teams, and ignite revenue growth. The Seismic Enablement Cloud™ is the most powerful, unified enablement platform that equips customer-facing teams with the right skills, content, tools, and insights to grow and win. From the world's largest enterprises to startups and small businesses, more than 2,000 organizations around the globe trust Seismic for their enablement needs. Seismic is headquartered in San Diego with offices across North America, Europe, and Australia.

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