

A top-down view of a collaborative workspace. Several people are gathered around a table, working together. The table is cluttered with various items: papers, a laptop, coffee cups, and a calendar. One person is pointing at a document, while another is using a laptop. The overall atmosphere is one of active collaboration and productivity.

lexer

THE 2019 CX PLAYBOOK

TRANSFORM YOUR BUSINESS WITH FRICTIONLESS CX

lexer.io



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Today, digital is the service channel of choice for 83% of consumers (Accenture)

Poor customer service costs brands annually over

\$3B

Studies have found that simply delighting customers is not enough, and customers want faster, synchronous responses - these needs herald a [new standard of digital customer care](#).

We've compiled this playbook for customer care focused professionals, based on our work with category-leading brands like ANZ, IAG, SEEK, Village Roadshow and Westpac - brands experiencing part of the additional \$350M revenue being driven by delivering great customer care.



↳ GOOD SERVICE CAN INCREASE LIKELIHOOD TO RENEW, RECOMMEND OR BUY ADDITIONAL PRODUCTS BY UP TO 30-50%. ↪

McKinsey

By the end of this book, you will know how to transform your digital offering from cost centre to profit centre with best practices on workflow, reporting metrics, brand voice and resourcing to deliver genuine customer care.

LET'S GO!

1 WORKFLOW & EFFICIENCY

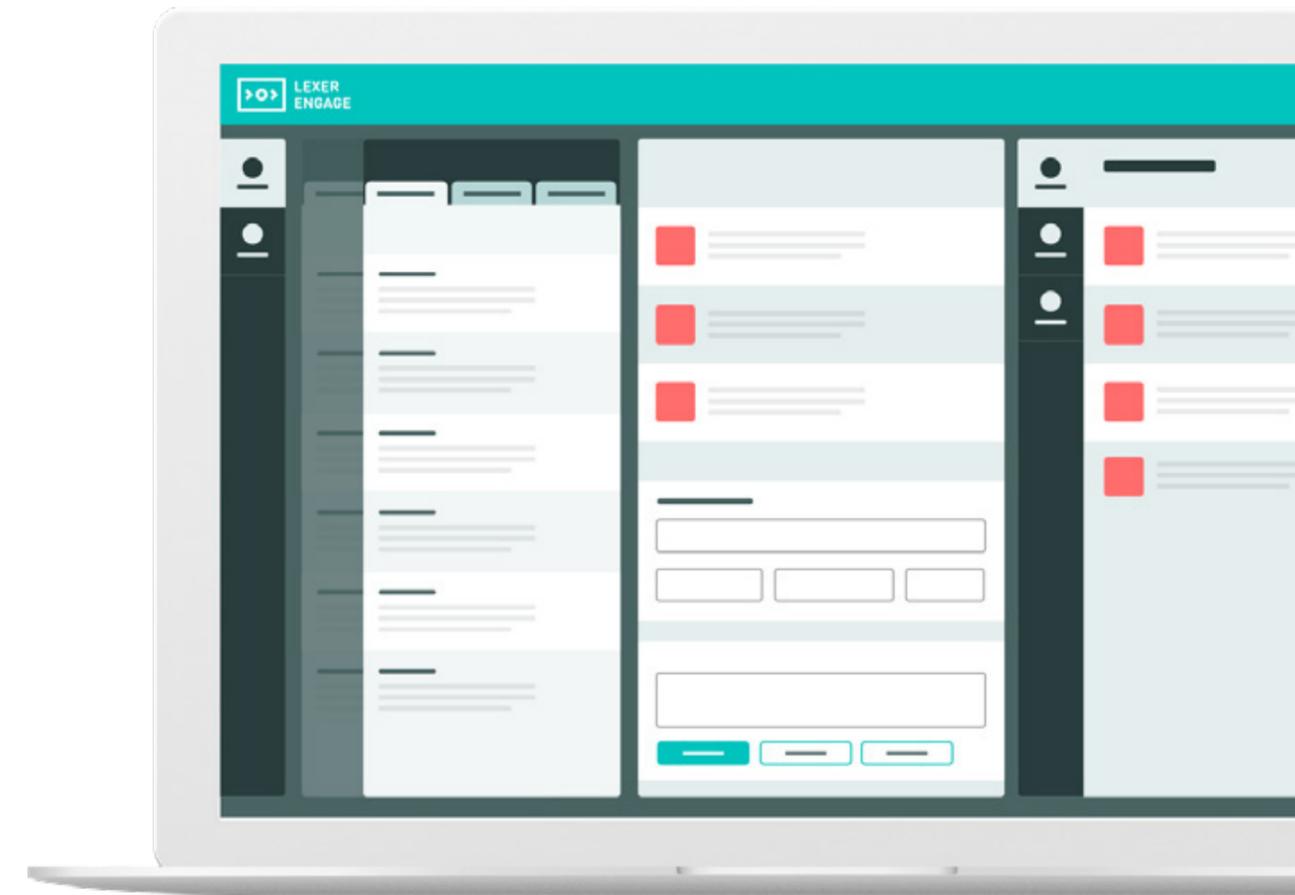
Establishing a clear workflow that allows multiple agents to work out of the same inbox is the first step for delivering effective service.

Triaging queries should take less time than responding and engaging with customers - where the lion's share of agent time should be spent.

- CENTRALIZING THE APPROVAL PROCESS 14-15
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42% of customers expect...

a response within one hour and delivering rapid social customer care directly affects the bottom line, with recent research finding airline customers will pay \$2.33 USD more for good social service, and this figure skyrockets to an extra \$19.83 USD if a response is provided within 6 minutes. - Twitter



Lexer Engage brings queries from all networks into a single inbox that is updated in real-time.

Using this frontline inbox you can rapidly tag and triage each query to the right agent for the job so teams can spend less time sifting through queries and more time crafting a great response.

CENTRALIZING THE APPROVAL PROCESS

It's a one-click handover process that ensures the customer gets a rapid response from the right person for the job.

This is extremely handy for escalating queries to managers, reviewing the work of new starters and maintaining continuity of response.

You can also consider...

Restricting access to posts on a sensitive topic to subject matter experts to ensure a timely response in times of crisis.



LEXER ENGAGE allows you to assign content to other team members for immediate response.

USING CLASSIFICATIONS

Classifications are bespoke tags your team can add to content as it comes in. Using the apply bulk change function in Engage you can add or remove tags at scale to report on later.

This section covers three ways you can use them to deliver great customer care: quality assurance, triage and inbound lead reporting.

Quality Assurance

Classifications allow agents to tag content for quality assurance.

For example, you can add a “QA” tag to your posts and a manager can jump in and review them later.

It’s an important feature to see how your team is tracking and identify areas for improvement with an accessible view of their activity that you can do in-platform any time you like.

Triage

Since classifications are so easy to search for, they’re really useful for triaging purposes, especially for teams working out of the same inbox (but often different countries, departments and teams).

Frontline responders can tag posts as they come in and [triage them to different departments to ensure a timely response](#), e.g. baggage claim, frequent flyer support, complaints, and public relations.

Inbound lead reporting

Classifications are also a really powerful way to report on inbound leads. When a lead comes in, agents can [create a classification for the channel, account or campaign for analysis later](#).

Show why the future of care is digital with a quantifiable metric for the value of great customer care.

SURFACING PRIORITY CONTENT WITH FILTERS

You can also rank your queue by recency and social media influence and exclude posts created by your brand.

Create relevant queues with the ability to filter content by:

- Network
- Location
- Handle
- Author
- Post type (DM, dark comment)
- Date

Through the lens of community management, Engage's filtering capability comes in particularly handy when posts go viral.

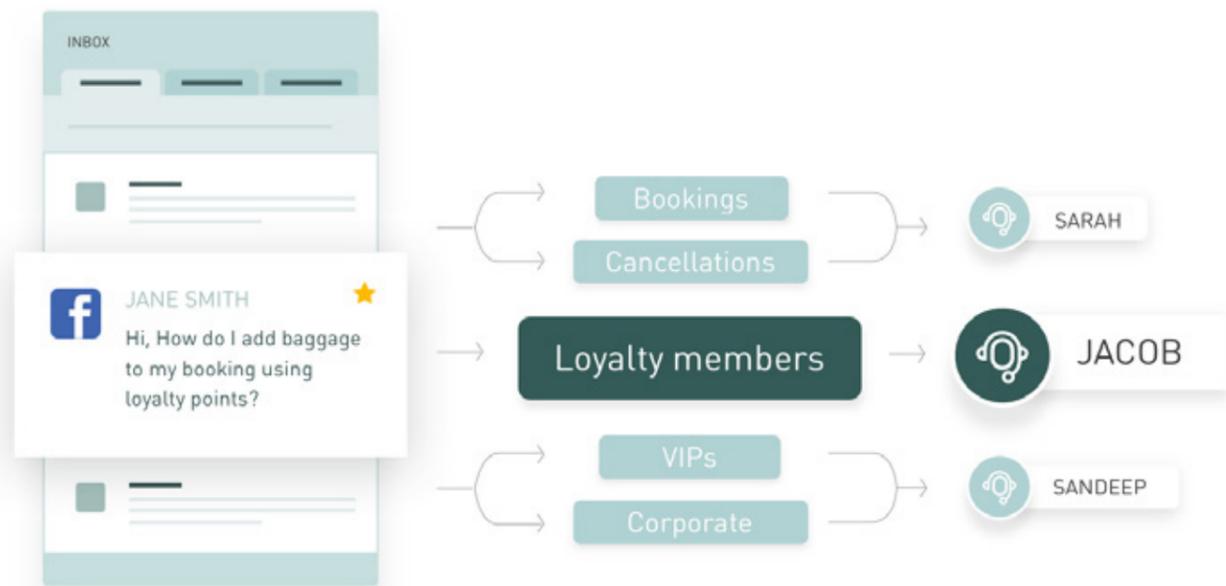
Agents can simply click the magnifying glass button to see responses to that particular post and get busy crafting their replies or closing off comments that don't need a response with the apply bulk change function.



STREAMLINING AGENT HANDOVER

Don't let customer wait times be impacted by a team member going on leave.

It's also really easy to change publishing permissions when team members move on and grant access to new starters once they're fully up to speed.



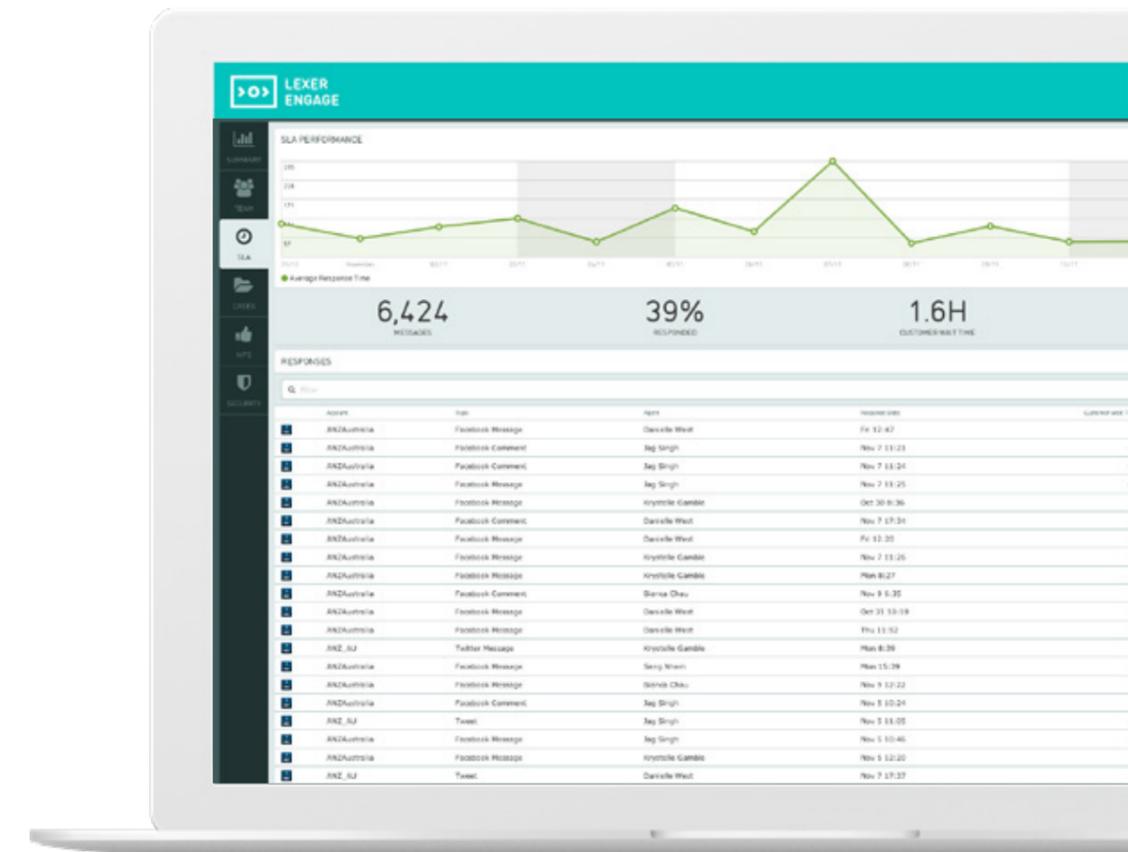
LEXER ENGAGE allows you to release ownership of cases assigned to you in the inbox and remove yourself from an approvers list if you're a manager.

2 REPORTING

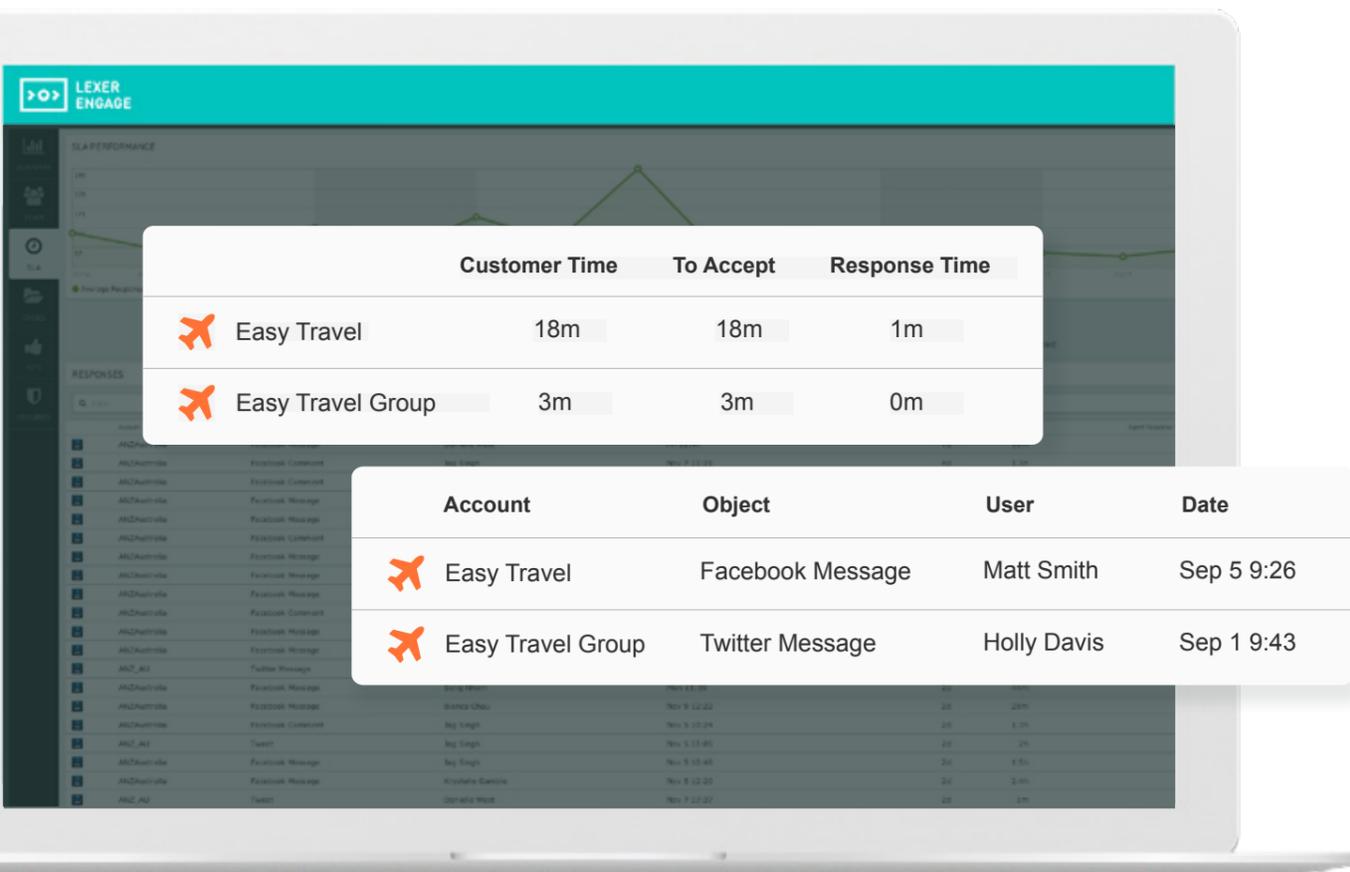
REPORTING

This section takes you through reporting metrics to quantify the success of your offering to the business and optimise team performance.

We'll go through SLA, NPS and Customer Cases and deep dive into how IAG NZ use Lexer Activity to benchmark their performance.



This table shows details of individual responses, sorted by the longest response times to the shortest.



These SLA metrics show the performance of each case which roll up to the team and company-wide results.

Account

The account your team member has responded from

Object

The type of object (Tweet, Twitter DM, Facebook post, Facebook PM etc.)

User

Your team member

Date

The date the user responded to the object

Customer time

This is how long the customer waited from the moment they created the object through to receiving their first response.

Response time

This is how long it took the team member to send the first response to the customer, recorded from the time the first team member took ownership of the object, through to when the first response was sent.

To accept

This is how long the object sat as Unassigned until the first team member took ownership of the object

SERVICE LEVEL AGREEMENT (SLA)

The maximum amount of time you keep a customer waiting for a response.

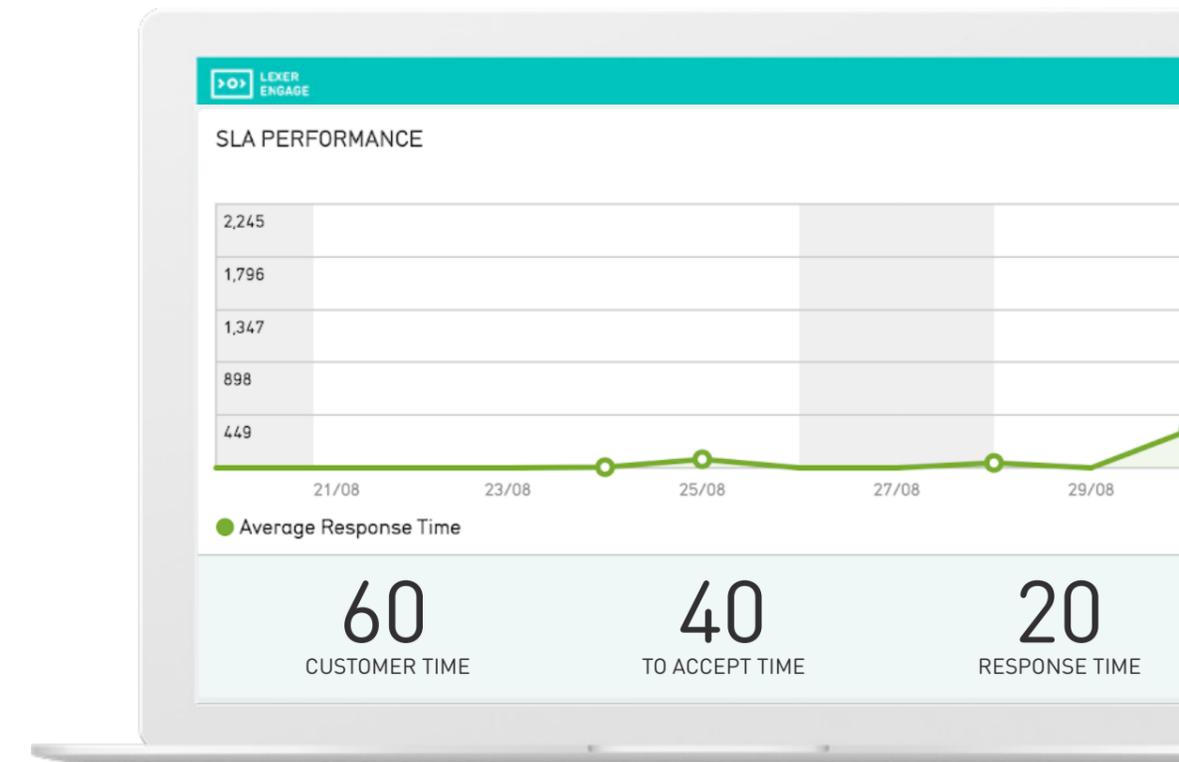
The standard SLA is 2 hours, each company changes this based on their business targets.

EXAMPLE

Customer Time is 60 minutes. The To Accept time is 40 minutes, and the Response Time is 20 minutes.

If the SLA is 2 hours, this case was resolved in 50% of the time.

What this means is that it took the team member 40 minutes to reach the object in their workflow, and then 20 minutes to draft and submit their response. So the total wait time from the moment of creation, through to the moment of response is 60 minutes.



Lexer Activity...

works in conjunction with Lexer Engage, recording all activity on content in your workflow, and reports back to you the equivalent of call center metrics. SLA is a classic example.

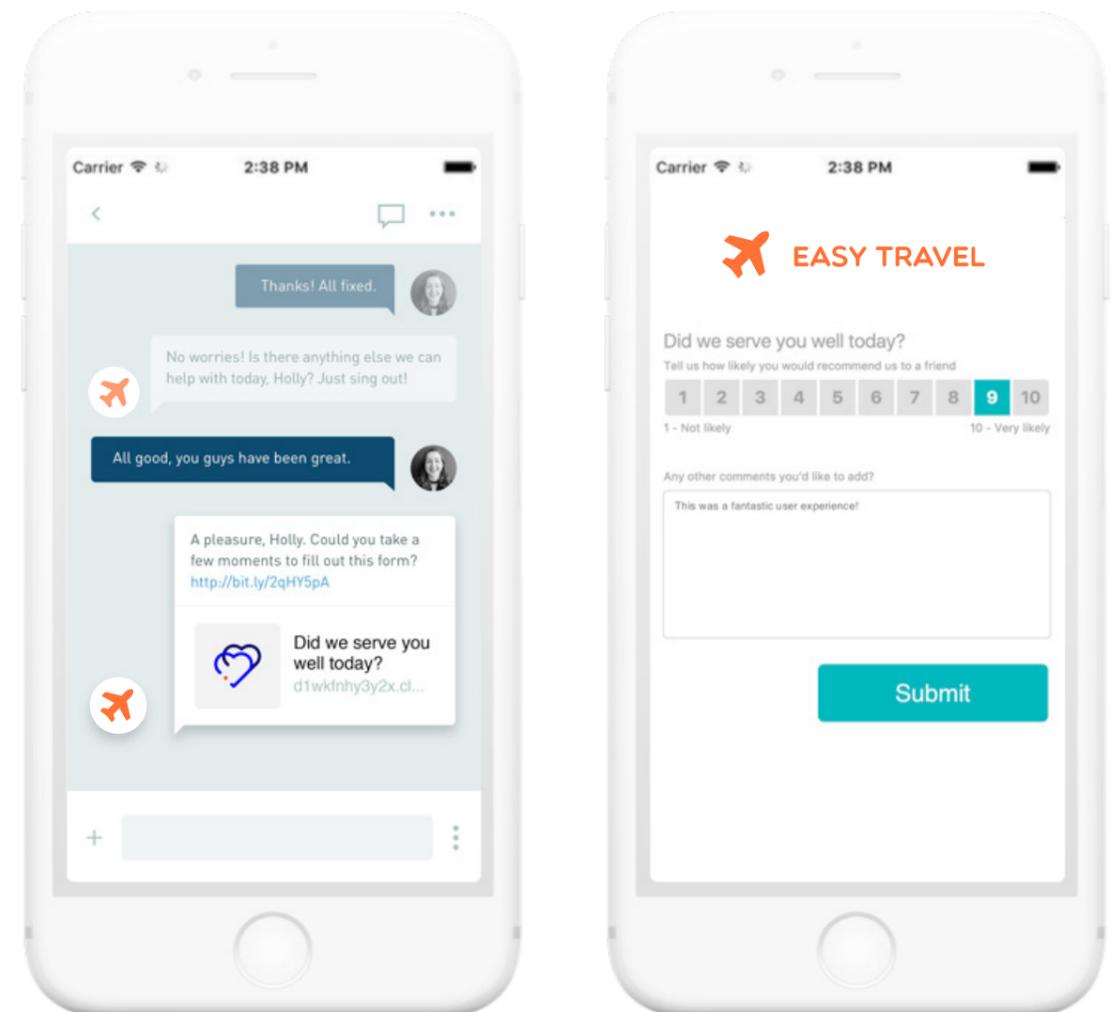
3 NPS REPORTING

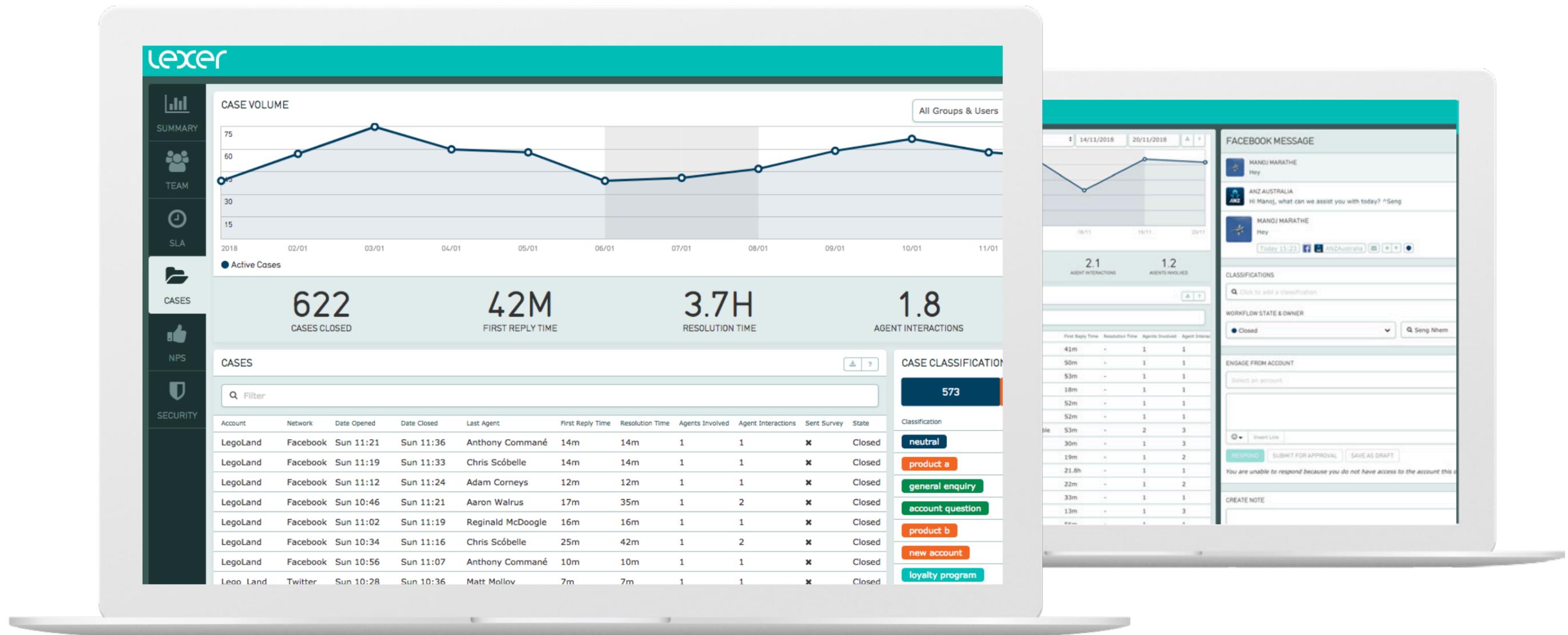
NPS REPORTING

A case is created when an agent responds to an incoming message on any of your social channels.

Cases are automatically closed under two conditions

- after 24 hours of inactivity from either the customer or the agent, and all messages from the customer are in a closed state.





To analyze a case

Click on any case to see the full case, starting at the first customer message to understand the case and consider sending a follow-up survey.

NET PROMOTOR SCORE (NPS)

Lexer NPS allows customer service agents to send personalized NPS surveys on social and attribute scores to full profiles of each individual.

Companies like IAG NZ use it to understand key drivers of customer satisfaction, identify promoters and detractors, and understand who they really are outside of their interaction with the brand.

“ It’s a fantastic way for us to monitor performance, identify customer pain points and create a better experience online. ”

Amelia Ritchie, IAG NZ

LEXER NPS helps us get closer to our customers and find out what makes a great experience for them.

BUILD CUSTOMER TRUST WITH NPS

Research has shown that 64% of people are more likely to trust a brand that interacts positively on social media (Sensis Social Media Report 2017).

For Amelia, using Lexer NPS to seek feedback from customers has been crucial in building great relationships.

“ BEING ABLE TO ATTRIBUTE NPS SCORES TO INDIVIDUAL CUSTOMERS IS REALLY POWERFUL. ”

GREAT SOCIAL CARE LEADS TO LOYALTY

Today, 42% of customers expect a response within one hour.

NPS methodology captures a qualitative view of each engagement, one which IAG NZ are using to gain a more holistic view of their service performance.

This proves that response time is an important metric, but what about the quality of the **actual engagement?**

Research has shown that good NPS scores directly correlate to customer loyalty (Temkin Group)

52% of customers switch providers due to poor customer service (Accenture).

When people reach out to us on social, we can use a full conversation history and their past NPS scores to deliver an informed and authentic response.



For IAG NZ, Social NPS is as much about reporting on team performance, as comparing success to more conventional service channels.

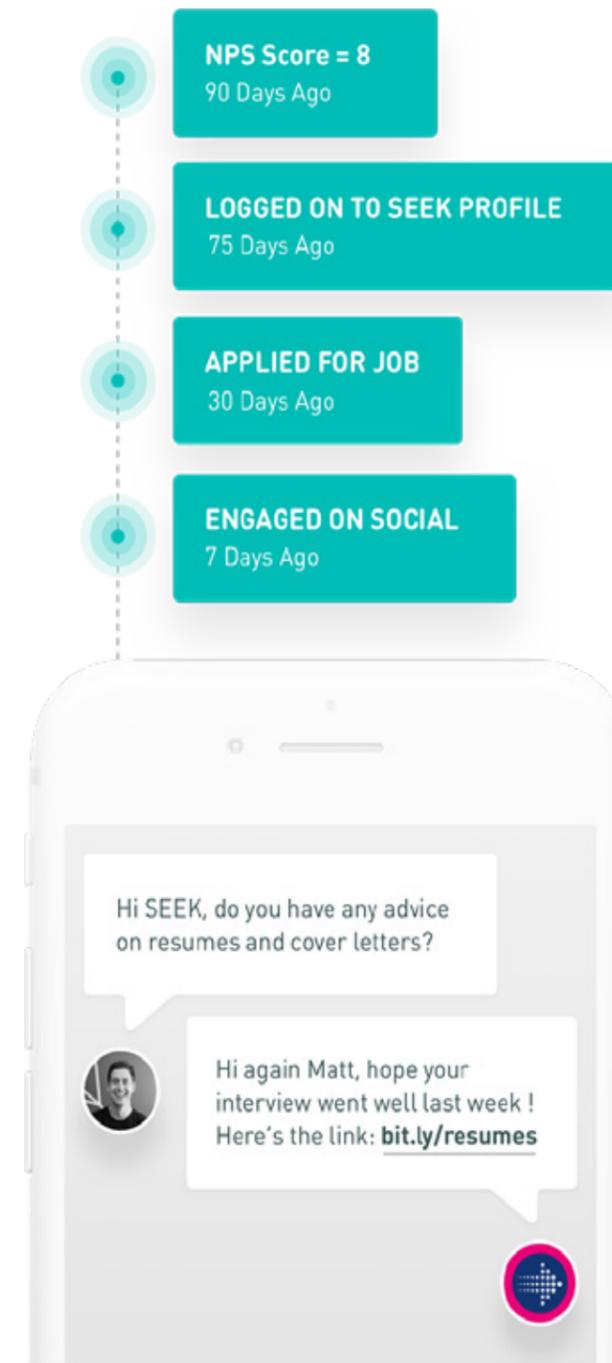
NPS IS A UNIVERSAL REPORTING LANGUAGE FOR CUSTOMER SERVICE TYPES

“ It’s really helped in benchmarking our success against other departments and building a compelling business case for social service. ”

Amelia

**Ever met a person who can't remember your name, or how you met, or who you are?
Even though you've been having a back and forth for days, weeks, or even months?**

4
CONVERSATION HISTORY

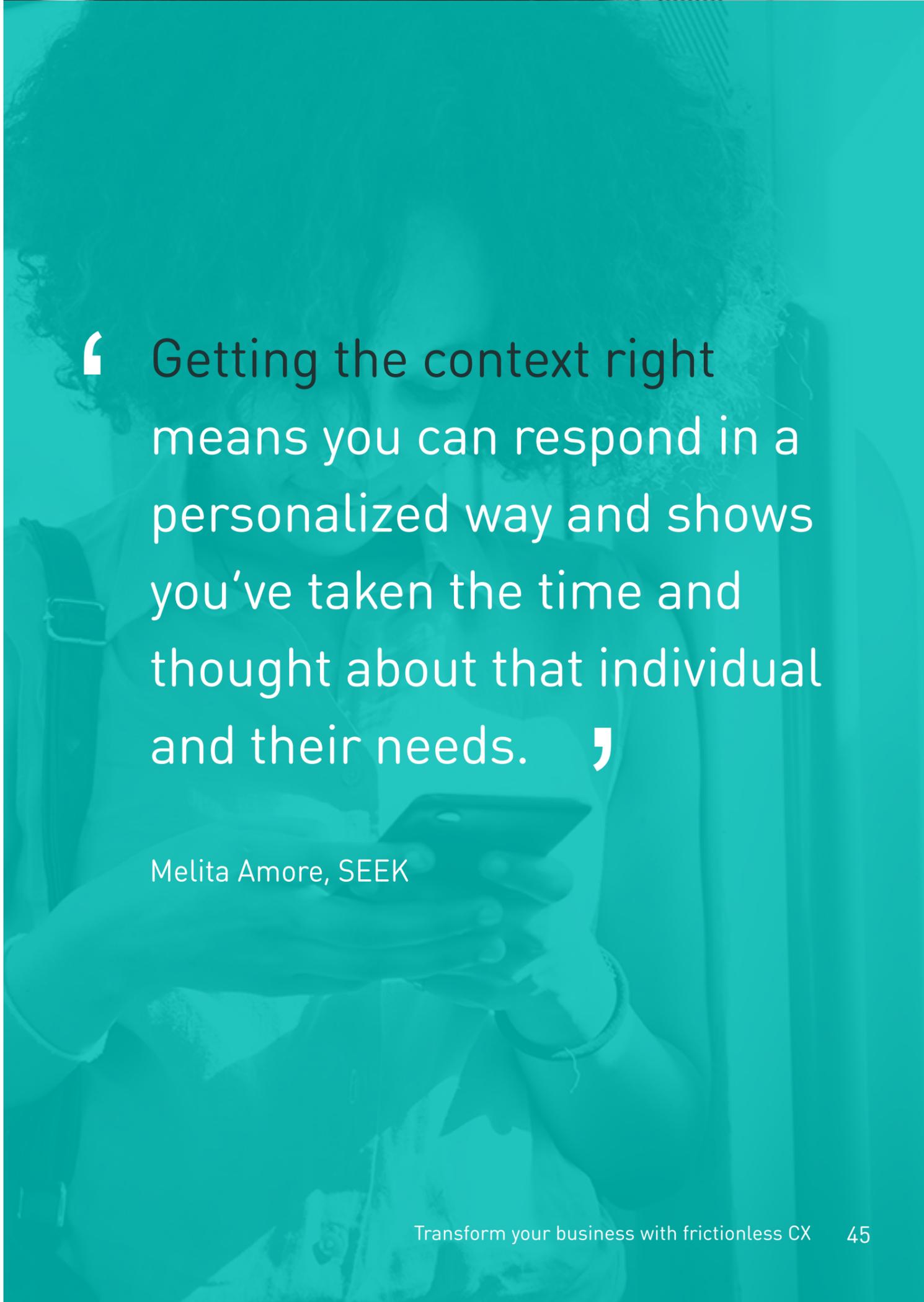


Now, imagine this awkward encounter taking place between a customer and a brand, on a very public forum: **social media**

73% of people say...

valuing their time is the most important thing

a company can do to provide them with good service (Forrester), and for Melita Amore from SEEK, acknowledging a brand's shared history with someone is crucial.

A woman with curly hair is looking at her smartphone. The image is overlaid with a teal gradient and a quote.

Getting the context right means you can respond in a personalized way and shows you've taken the time and thought about that individual and their needs.

Melita Amore, SEEK

TO HELP UNDERSTAND THIS CONTEXT

SEEK use the History Column in Lexer Engage to see a comprehensive timeline of previous engagements. It allows agents to answer key questions customers have.

This information helps deliver a genuine and contextualized response that:

- Acknowledges shared history
- Evades double-ups
- Boosts brand advocacy

WHAT HAS THE PERSON SAID BEFORE?

HAS THEIR EXPERIENCE OF THE BRAND BEEN A **POSITIVE OR NEGATIVE** ONE SO FAR?

HOW DID THE TEAM RESPOND AND WHO RESPONDED?

WHAT INTERNAL CASE-NOTES HAVE BEEN LEFT ON THIS PERSON?

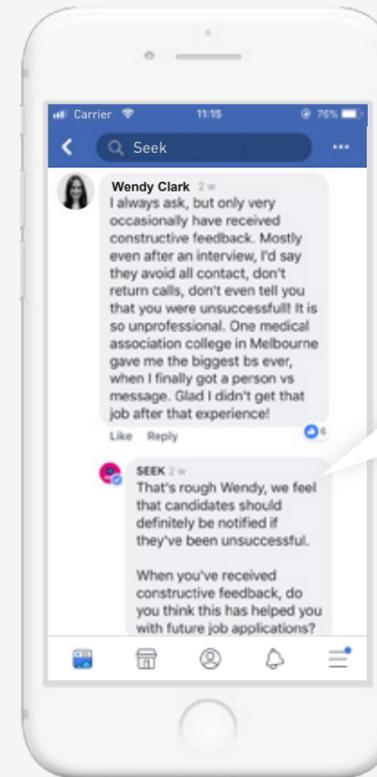
This has a material impact on changing brand perceptions of SEEK from jobs board to career partner, with those aware of SEEK's social media channels.

25% more likely to say...

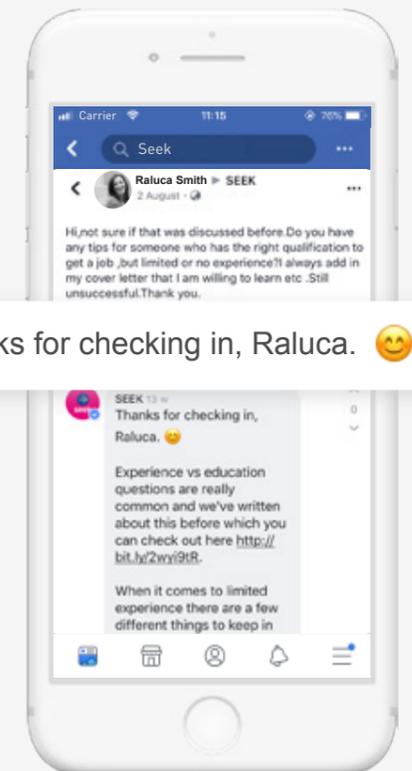
SEEK provides advice, tips and training to help you with your career

36% more likely to say...

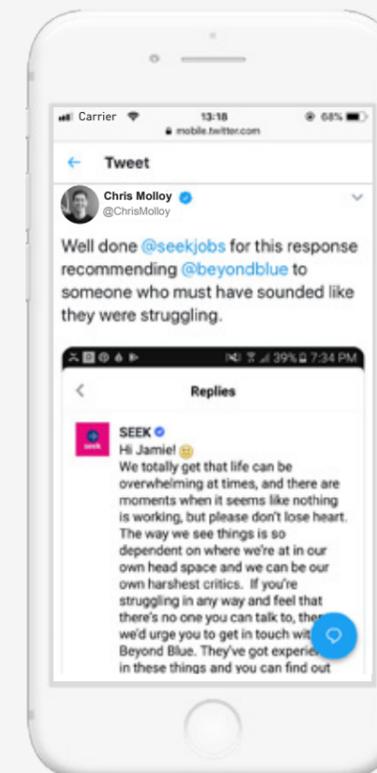
SEEK is always there to support me through my career



That's rough Wendy, we feel that candidates should definitely be notified if they've been unsuccessful.



Thanks for checking in, Raluca. 🙄



Well done @seekjobs



5
TONE OF VOICE

TONE OF VOICE

It's important to maintain a cohesive brand voice across all channels, and it's also key to ensure this manifests as a human talking to another human, naturally and not in corporate speak.

In the U.S, the estimated cost of customers switching due to poor service is...

\$1.6T

Accenture

HUMANIZE YOUR ENGAGEMENT

✘ How can we be of service to you today, sir?

✘ Heya, how can we halp??

✘ Hello customer.



Hey, thanks so much for reaching out, Jason, I can see you're checking your account balance.

A good way to achieve this is...

by creating a 'brand character' for the team to respond as.

This character should manifest the qualities outlined in your brand's blueprint and have a very distinctly human voice and personality.

Once this character has been introduced to your team, use Lexer Engage's drafting and review features to:

- Encourage** agents in training to submit posts for approval
- Keep track** of their work through bespoke classifications
- Restrict** publishing access to only those who have passed the test
- Mimic** your character's qualities and a cohesive, human voice will begin to inflect each and every response.

As a leader in a Digital Customer Care team, it can be really challenging to know where to focus time and resources.

6
RESOURCING



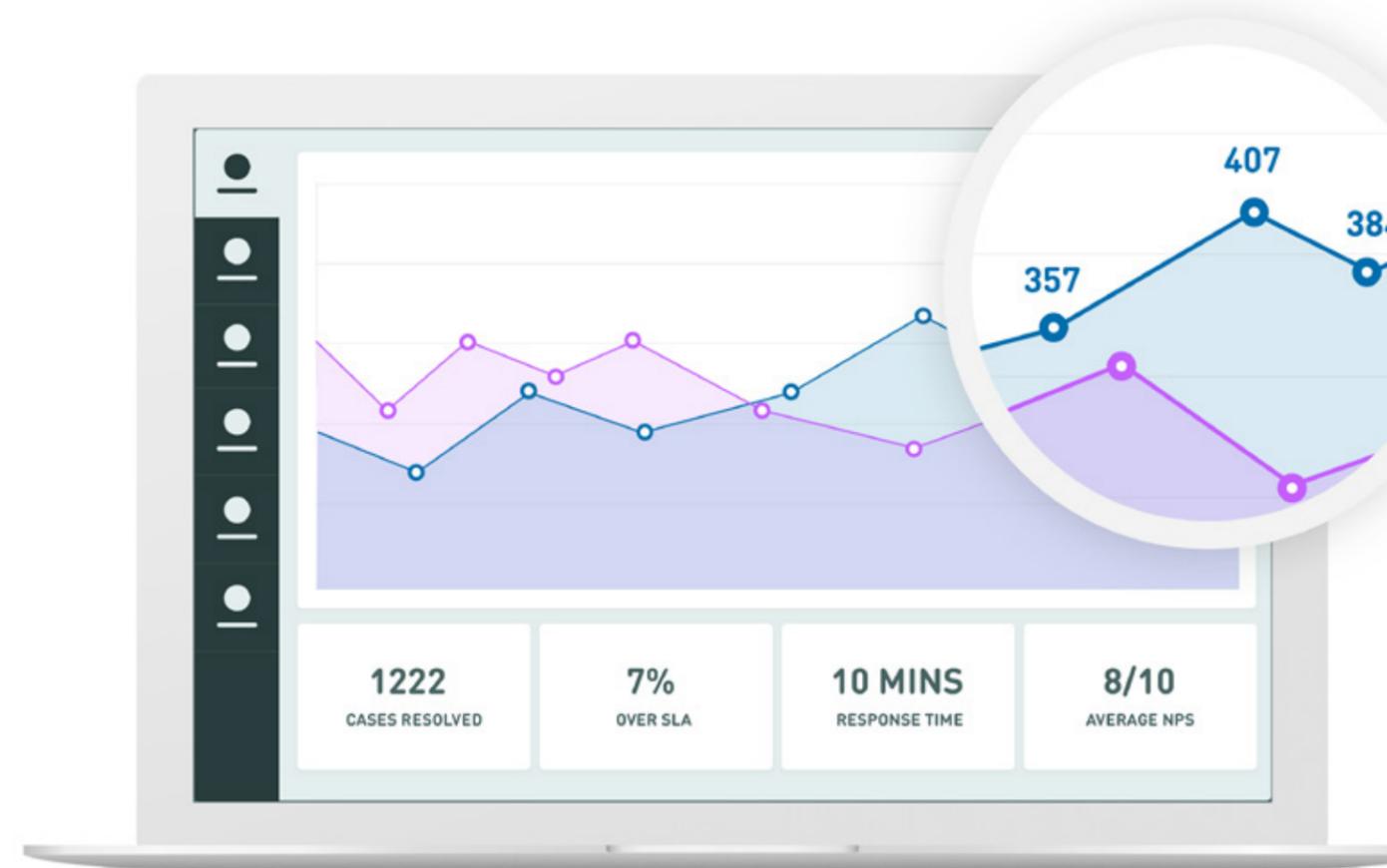
Most brands experience a spike in activity as the working day ends.

CoSchedule

RESOURCING

The answers to all these questions come from an analysis of your community.

Start by assessing volumes and response times at different parts of the day and night to ensure the right number of staff are on shift at the appropriate time. Then, monitor trends in content to get a global view of what your community are actually talking to you about.



You'll learn more about the **type of content** that speaks to them, as well as **the most common types of queries** coming through each day and night.

RESOURCING

Finally, you'll come to a judgement call on volume vs the capability of your current team.

Considering most brands experience a spike in activity as the working day ends (CoSchedule), there may be a need to resource around conventional working hours, especially if you're leveraging this activity by posting at the end of the day.

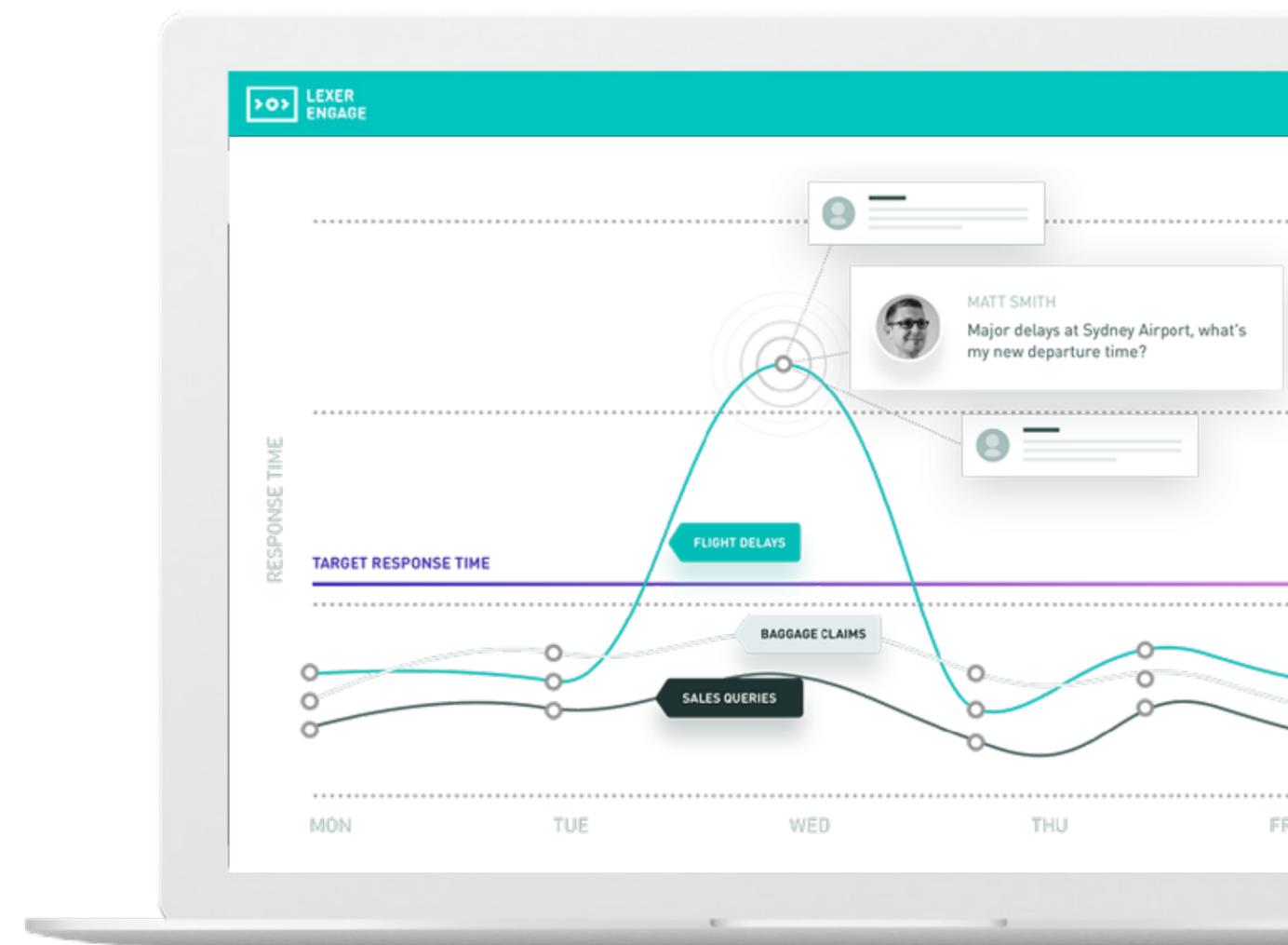
Now, consider your social KPIs:

- For organic reach, it may be necessary to respond to every post
- Just starting out? It may be appropriate to dedicate resources to these types of queries to set expectations
- For likes, tweets and shares, prioritise Influencers

The important thing is to move with your audience, and recognise that social never really sleeps.

RESOURCING

Lexer Activity offers powerful engagement analytics to help you resource for a 24-hour conversation with a holistic view of spikes in activity and detailed topic analysis.



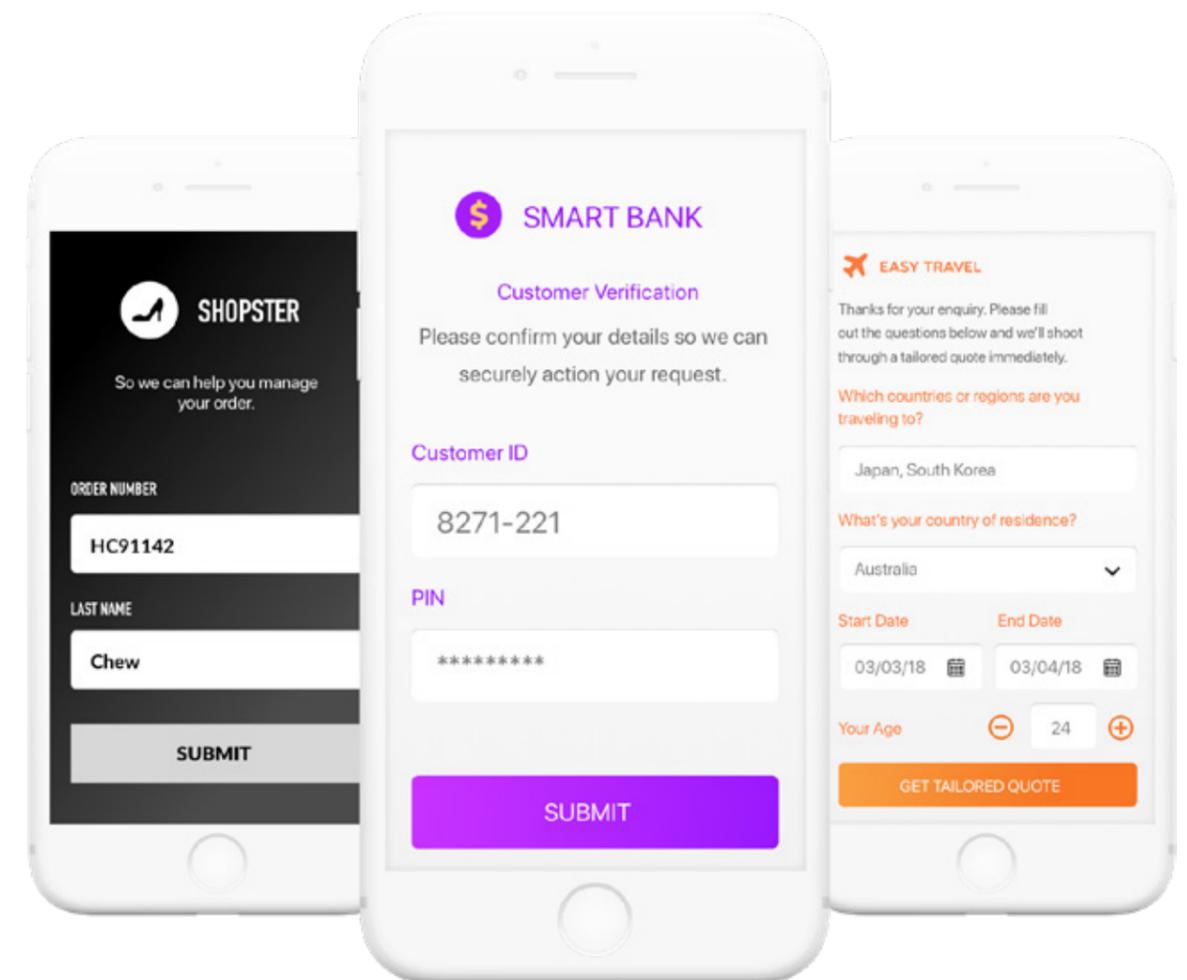
7

COLLECTING CUSTOMER DATA

COLLECTING CUSTOMER DATA

Personally Identifiable Information (PII) includes any data that makes that person recognisable.

This includes things like email address, name, physical address, phone number.

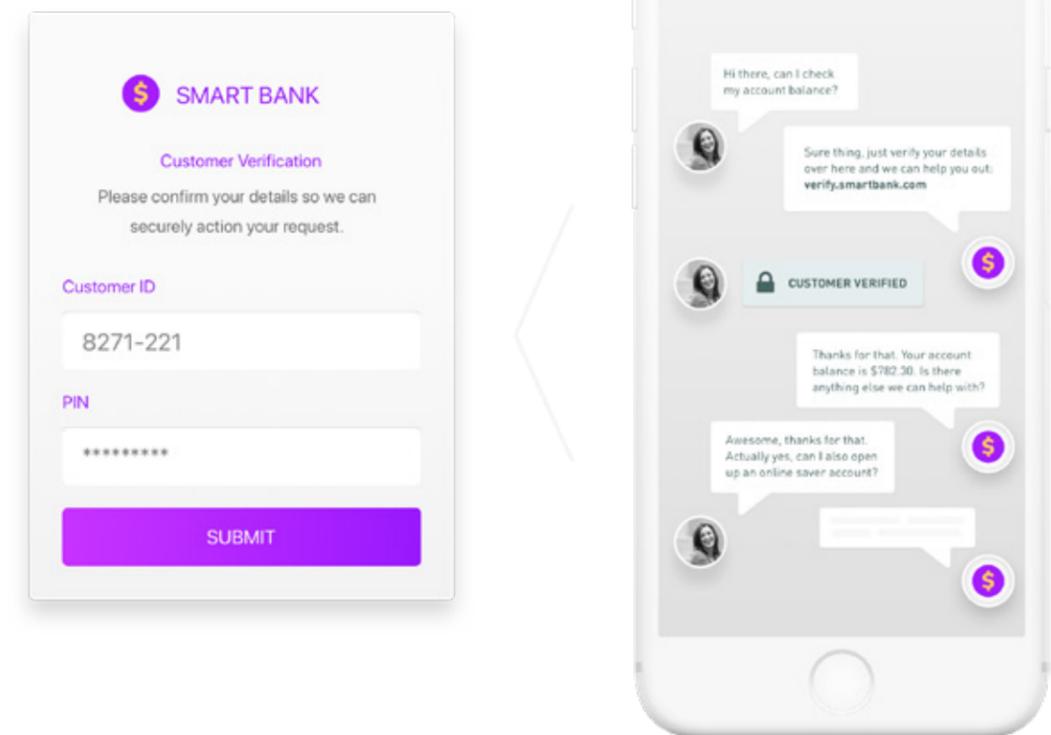


On May 25, 2018...

GDPR legislation commenced, stipulating that **brands must be able to demonstrate a lawful way of processing and securing PII**, and confidential data like a PIN number or security question in the body of a Facebook message just won't cut it.

Should you really be asking your customers for PII on this channel?

Recent events like the Cambridge Analytica scandal and hacks to high profile talent management company, PageUp People mean customers are holding PII closer to the chest than ever before.



YOU NEED A SECURE SOLUTION

To enable secure customer care on social, Lexer developed a solution for sharing PII with an agent in a way that the data never makes into social itself.

The details feed into the Engage inbox as a new message, so you can get on with securely actioning their request.

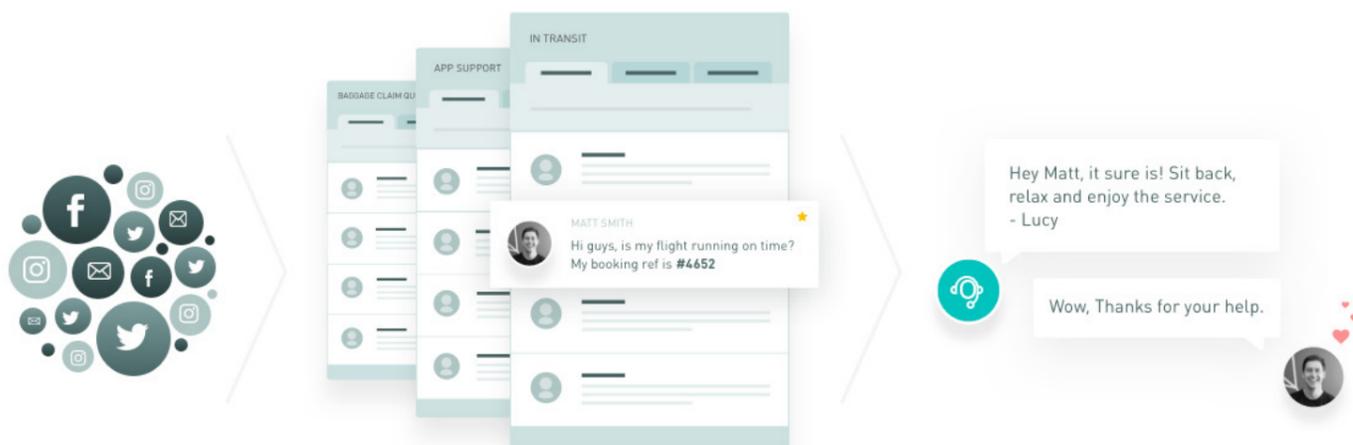
Through Lexer Engage...

agents can send a secure form for customers to verify their details securely, enabling the agent to continue the service conversation.

LEXER stores the data in an ISO and SOC 2 a GDPR compliant environment, so you know their data is safe.

GIVING VIRGIN MOBILE AN EDGE

For Robbie Dickenson – Associate Director of Virgin Mobile Operations, Lexer’s social authentication workflow makes it simple for the team to action requests involving PII.



Authenticating customers quickly and securely cuts down response times and helps us deliver amazing customer care.

Robbie Dickenson

With 25% of Virgin Mobile's customer service requests containing personal information, the feature means the team can now manage it efficiently in a secure environment.

52% ▼ first response time

32% ▼ case resolution time

70% ►► solving customer service queries

Our customer service team love it. It's easier for them to provide even better service to customers. Thanks to this feature!

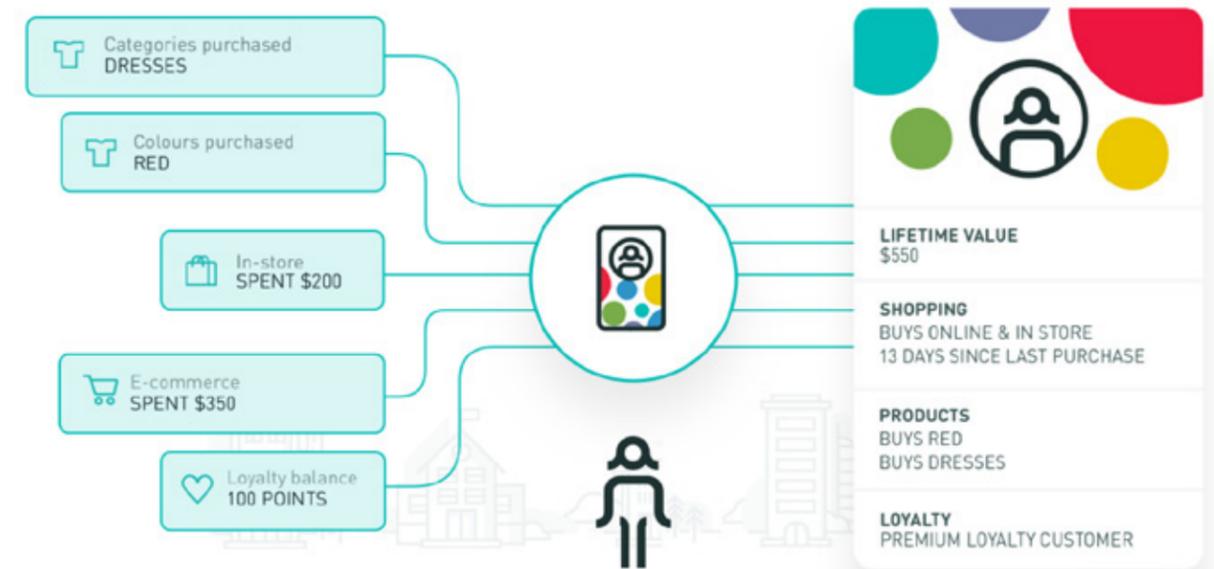


TALK TO US TODAY!

Lexer helps companies like SEEK, Optus and Westpac deliver world-class customer service powered by data.

Lightning fast workflows, enriched customer profiles, and full conversation history.

Our CDP feeds customer data into your inbox to provide a holistic view of next best action for each customer, and also allows you to send surveys that can be appended to their customer record.





THE 2019 CX PLAYBOOK

To learn more about what we do for our clients, read our case studies and check out our digital customer care tool, Lexer Engage.

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