THE HELPSHIFT PHILOSOPHY

How to deliver customer support in a mobile-focused world

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help**shift**

Table of Contents

The History of Customer Experience

In order to understand the value of Helpshift in today's modern world, you have to look at the history and progression of the customer experience with businesses. Technology and tools have changed how businesses communicate, sell, and support their customers. It is the customers, not the businesses, who dictate how they want to be served.

The Local Store

Up until the 1960's, businesses and customers interacted with each other in one location—the business' physical (brick & mortar) store. Want to buy a toaster or a notebook? You had to go to your local hardware or general store to buy one. If you wanted to compare the toasters or see what color notebooks were available, you had to go to the store.

The only way to learn about new products, clothing, and services was to either ask your peers or go into the local store and ask a sales associate. If you regretted a purchase, you had to go back to the store to return it in person.

So the customer incurred a lot of time and traveling costs to learn, purchase, and return products and services sold by businesses.

Call Ahead with Telephone

As home telephones became more affordable and the switchboard relied less on human operators, we saw a new way that customers could conveniently communicate with businesses. Instead of having to visit the local butcher to see if there were any more rib eye steaks left, customers could now use the telephone to remotely ask this question. From the comfort of their own homes, customers could call up multiple businesses to make their traveling and shopping less time consuming.

As more customers started calling businesses, there was a need to manage the influx of calls. Throughout the 70's and 80's, companies started hiring phone agents to support these calls. New technology emerged to route customers, including putting calls on hold and transferring them to different agents.

Other industries besides traditional commerce and shopping started to offer the phone as a way to communicate with their customers. Instead of visiting a bank in person, customers could call ahead and speak to their teller to inquire about a fraudulent charge. Rather than visit a travel agency or go to the airport to buy a plane ticket, a customer could place the order over the phone.

In the 90's, there was a leap in telephone technology with the introduction of the portable and pocketable mobile phone. Now customers could call a business anywhere instead of having to be stationary at their home, work, or other physical location.

Save Time with Email

In the late 90's and early 2000's, a new technology emerged that would transform the way customers interacted with businesses. The Personal Computer became affordable, and the Internet and email allowed businesses to expand their reach to customers. Email became the way to quickly communicate with people if you didn't need an immediate response. A phone call put you in contact with a live person, while an email allowed you to send and receive numerous messages over time.

Customers called businesses so frequently that systems were designed to put customers "on hold" as companies couldn't staff their representatives on a 1:1 ratio with customers. The immediacy of a phone call was diminished as customers would have to wait

five, fifteen, or even thirty minutes just to talk to a representative of a business. At a certain point, customers decided that waiting on hold for thirty minutes was inconvenient, especially if their questions were simple, such as "how late is your State street location open till?" or "what is your return policy?"

Email became the preferred communication medium as it allowed customers to ask questions on their own time, without having to wait on hold. Businesses promoted email over phone as they didn't need to staff for real-time communication with their customers. With phone calls, each representative could only assist one customer at a time; email allowed increased efficiency with each representative able to handle many more requests at a time.

The Internet continued to grow in popularity. Online-only businesses, like Amazon.com, became the preferred market for customers. Noticing this trend, store front retailers, such as Nordstrom, opened up websites and encouraged their customers to make their purchases online. Instead of spending time traveling to a store, talking to a store associate, and making a purchase, customers could quickly select their preferred item and complete a transaction in real-time without leaving their own home.

The convenience of computers, the internet, and rise of online shopping became second-nature to consumers. Multitasking at the computer, booking a plane ticket to Paris, checking the new movie schedule at the cinema, and emailing a few plumbers to get quotes, all could now be completed within an hour. The telephone quickly became the least preferred way to communicate with businesses due to long hold times.

The Phone Strikes Back

The year is 2005 and you can do almost everything on the Internet with your laptop or desktop computer. You can buy luxury purses, schedule an appointment at your auto mechanic, and pay your monthly credit card bill. Of course, you needed to be at your desktop computer or laptop to do these tasks. You had to mostly be at home or work, but you could always bring your laptop to a coffeeshop and use the free Wi-Fi to get online.

And then the smartphone happened.

Technology evolved enough where you could have one pocketable device that could make phone calls, send/receive emails, send/receive short messages to other phones (SMS), and access the Internet. The "on-the-go" consumer was born. People could communicate and engage with anyone or any webpage from the palm of their hand instead of being tied down to a desk.

Mobile networks became faster and data plans got cheaper. The competition to engage users on mobile became just as important as web. With the launch of the iPhone, Apple introduced the world to mobile 'apps'; Apps made it convenient for consumers to quickly engage with a preferred brand without searching the Internet. Businesses now had an opportunity to be with their consumers at all times through their native app.

Apps were designed to be a rich, fast, and branded experience for users. Just like scrolling through a website on a desktop, users could engage with apps on their pocketable devices and view products, account information, and service status.

Over the past few years, smartphones and network connections have gotten so powerful that people prefer to use their smartphone over their personal computer (CNN article). The immediacy of mobile means that consumers can buy, sell, chat, and browse from a portable device that's always available and can be used on their own time.

Supporting Mobile Users

As customers can do everything in a matter of seconds from their smartphone, the demand for service has become instantaneous as well. Current support tools in mobile apps don't align with the in-app speed and branded experience that the business offers. Businesses use web pages or phone support to take the user outside their branded app to get support. Traditional channels such as phone or email break the mobile experience due to long wait times and the fact that these channels are disconnected from one another

Businesses have been investing resources in the "app experience" compared to the mobile web experience for a number of reasons. From a brand perspective, businesses have more control over the look and feel with the app than they do with the web. Apps render images and pages faster than mobile web, which the typical "on-the-go" user prefers. Think of mobile apps as the optimal branded web experience for the business' mobile users.

So how can we improve the interaction between customers and businesses in the powerful and sophisticated mobile app economy?

Helpshift Enters the Market

helpshift

There was a user experience gap between the businesses' mobile app functionality and their customer support. Businesses want their users to experience their app and stay in it as much as possible, so why did users have to leave the app to receive help?

Helpshift is designed and built as the tool to communicate with customers in a smartphone dominated world. Founded in 2010, the Helpshift team predicted that smartphones would continue to grow and that native apps would be the primary way people used their devices, not the web browser. At the end of 2010, Apple's App Store celebrated 300,000 total apps. At the beginning of 2017, that number is 2.2m apps.

Apps are the future and they're here to stay. Uber, Clash of Clans, and Tinder are a few examples of mobile-only businesses.

These apps, who service millions of users everyday have to support their customers with a Customer Relationship Management (CRM) or Help Desk tool. With the speed and size of supporting these mobile users, you'd assume they would use a tool designed for mobile. But you would be wrong.

Unfortunately, many of these apps use a CRM like Salesforce or Help Desk like Zendesk that were built before the mobile era. When these tools hit the market, the App Store didn't exist, Blackberry Messenger (BBM) was the trendy way to communicate, and Amazon.com mostly sold books. Back then companies used Salesforce and Zendesk to manage customer support via phone and email. They promoted email support as a cost-saving alternative to phone support.
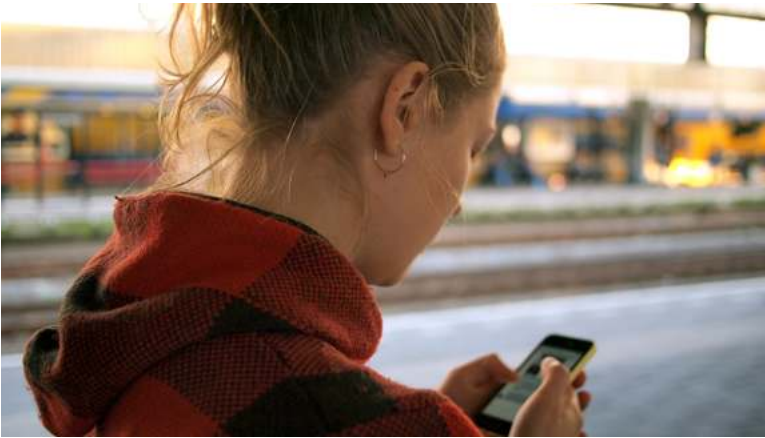
Let's fast-forward to 2017. Today, we live in a world of chat and messaging, where people prefer to communicate via Whatsapp, iMessage, Facebook Messenger, and Slack. And yet, the market leaders in CRM and Help Desks primarily offer email as their communication method for businesses to support their customers.

The chat experience, like Whatsapp and iMessage, is how people talk to each other. Shouldn't customers be able to chat with a businesses' support team in that same way?

Helpshift was founded to bring a true customer experience to the new mobile-first and dominated world.

The Helpshift Experience for Users

In order to create the best support experience in a mobile app, you first have to understand the end users and their relationship to the mobile device.

Users of mobile devices are on-the-go. They interact with digital apps and the real world simultaneously. Desktop users have designated time to sit down and utilize a large monitor with a keyboard and mouse to navigate a program or web page.

So it's imperative that you offer these mobile users a user experience that is fast, searchable, and seamless.

Compared to a desktop or laptop, a mobile device has:

- **A small screen (~5in)**

- **A small touch-enabled keyboard (no physical keyboard or mouse)**

- **Always on data (WiFi and 4G LTE)**

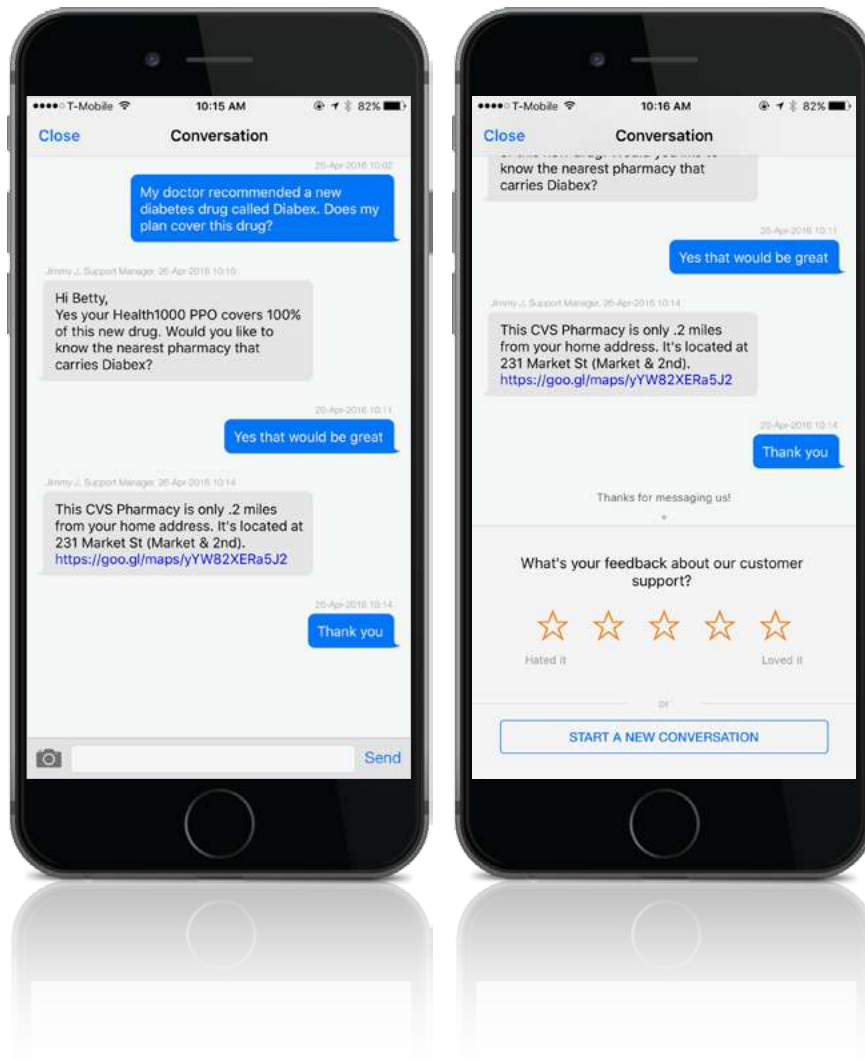- **30+ apps with always-on push notifications**
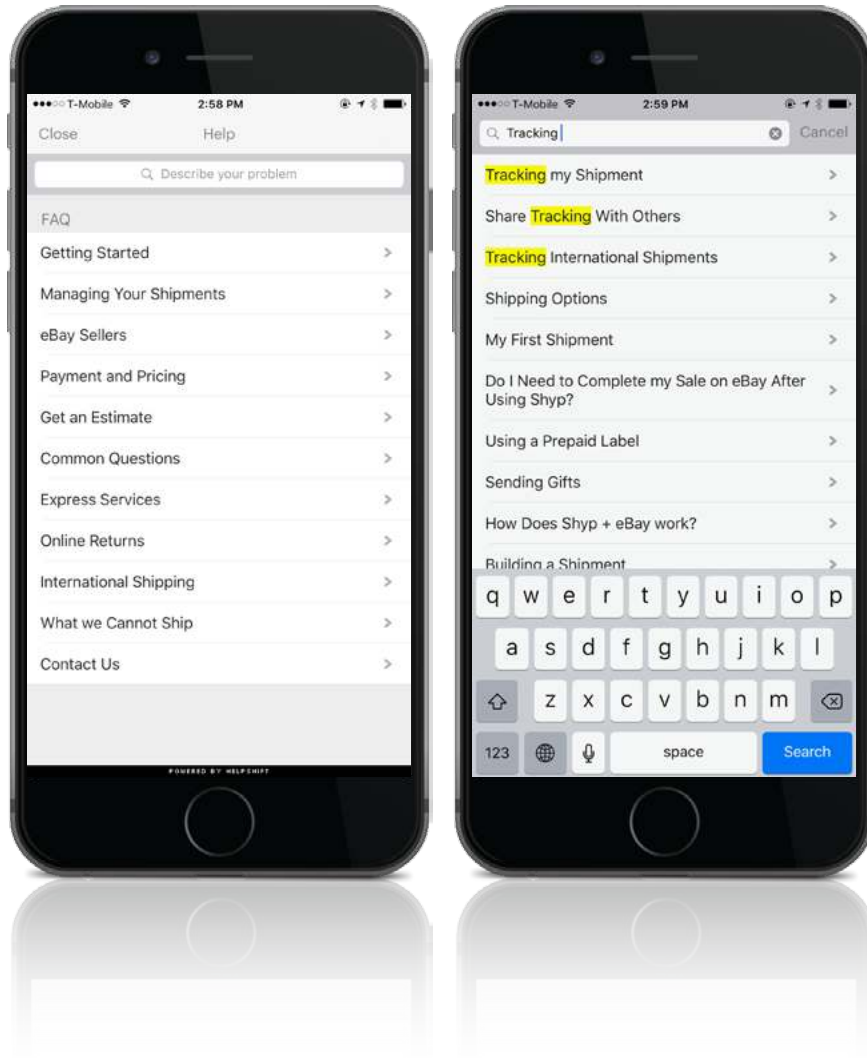
Self-Service with FAQs

Helpshift's native in-app FAQs make it easy for customers to browse & search to find answers to their questions. As customers self-serve more, there are fewer tickets created, which is a cost-saving win for the business.

Immediate Communication with In-app Chat

When a customer has a high priority question or is short on time, businesses can utilize Helpshift's in-app chat feature. Just like Whatsapp or others messaging apps, customers can quickly communicate with businesses on their mobile devices. Unlike other chat products, Helpshift allows the conversation to remain open even if customers leave the app or chat session.
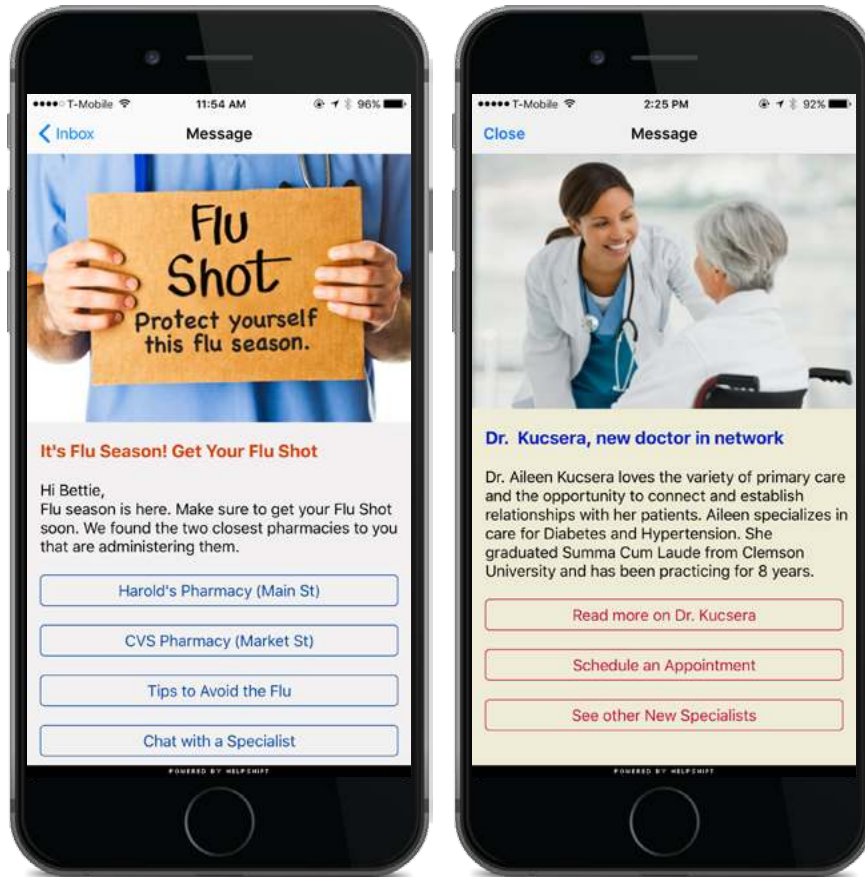
Engage Select Customers with Proactive Support

Every time a customer reads an FAQ or starts a new chat, it's usually because something went wrong either with the app or their expectations of what the app should provide. With Helpshift's Proactive Support, businesses can send targeted content and push notifications to these customers in their time of need. By sending useful information, there is a reduced need for customers to contact the support team. The right content at the right time promotes a positive customer experience with the app and business.

How Helpshift Improves the Operations Experience

Until now, you've read how Helpshift improves the customer experience in mobile apps, but Helpshift is more than just a plugin for your app. Helpshift's Dashboard is a full-stack CRM that allows small and large operations team manage, communicate, and measure their relationships with their customers.
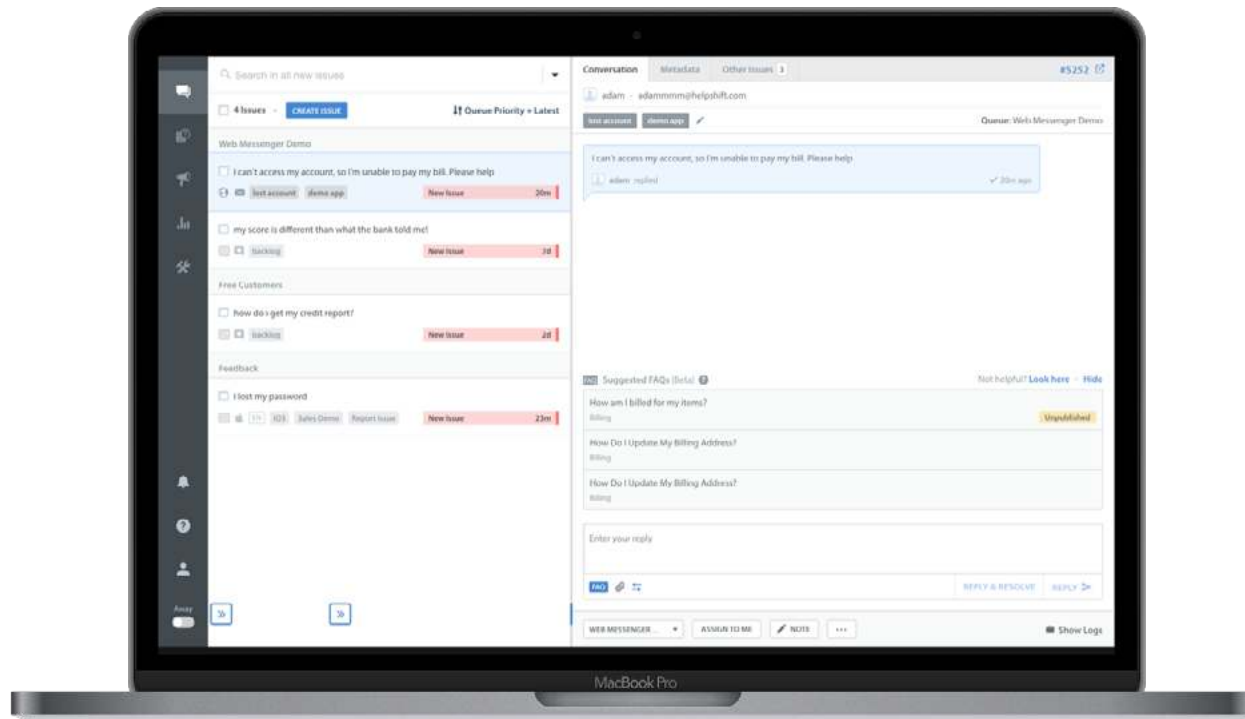
Automatic Categorization and Lowering Costs

Helpshift believes that support agents shouldn't spend their time manually identifying, categorizing, and assigning tickets. With the SDK and our 'automations', you're able to structure your team so tickets are categorized and routed based on parameters, such as issue type, language, and/or user role.

Your customers may contact you about a variety of things, such as app crashes, damaged items, or feature requests. Traditional help desks treat these as the same priority, when in reality, they aren't. Customers who are experiencing app crashes, should be prioritized over other customers who message you about feedback or other non-important requests. Currently, you might have one of your senior support agents sorting through all incoming tickets and making these judgements on what is a priority. You could save a lot of money and have technology make objective decisions on preset conditions. This is just one area where Helpshift lowers your operational cost.

Regardless of your business type, you will have two types of customers: free/low engagement customers and paid/ high engagement customers. In a perfect world, all support operations would have enough money and people to answer every customer in a matter of seconds who write in. In reality, this is not the case. So you'll want to help certain customers before others. Usually this is defined by customer spend or engagement. Customers who spend $500/month in your app should have their inquires answered before those who only spend $5/month. Fortunately, Helpshift's technology makes it easy for these customers to be identified and segmented automatically.
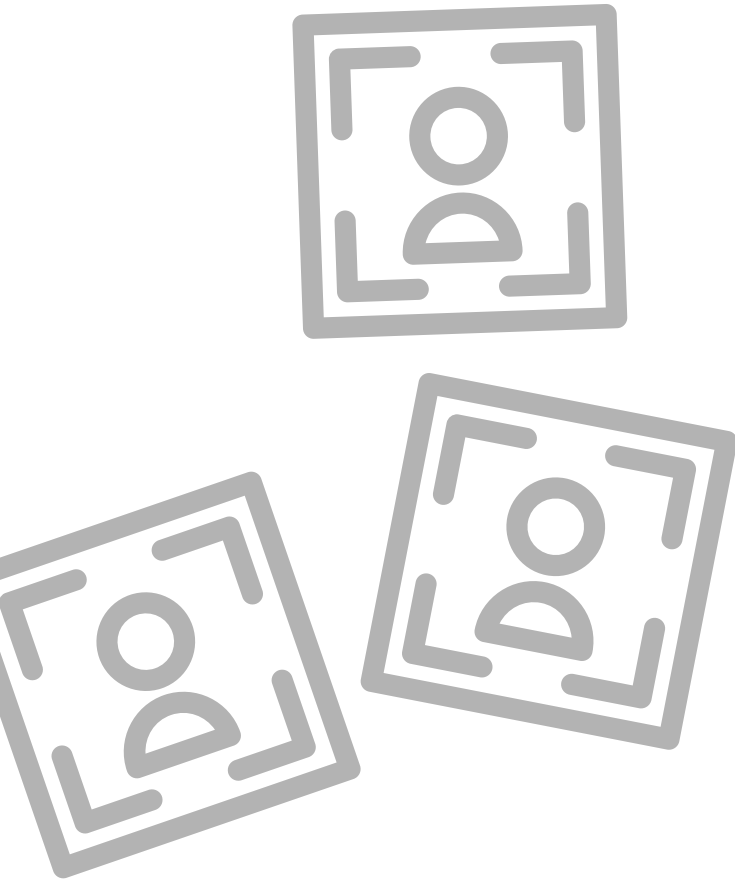
Agents Should Focus on Customer

In customer care, you want your team to resolve the most tickets possible within a given time period. In other systems, agents waste valuable time on researching customer information and asking customers for their device information, then following up to see if customers received their messages. The added time ultimately increases resolution time. At Helpshift, we want your agents to delight as many of your customers as possible while having the right information to help resolve those tickets.

Agents working with Helpshift are automatically assigned tickets based on their skillset and availability. As a Helpshift admin, you decide what type of tickets are automatically routed to groups of agents. For groups of agents, incoming tickets can be assigned in a round-robin fashion, which distributes tickets evenly. There is no need for agents to spend time assigning tickets to themselves or pulling them out of a queue.

There's also built-in load balancing, ticket priority, and backlog management functionality that allows the system to make automatic decisions based upon set business conditions. So if your agents can't handle more than four tickets in their feed, the system will place any new tickets in a backlog. As agents reply to their assigned tickets, those backlogged tickets will be distributed automatically and prioritized by length of customer's wait time.

Additionally, you can configure the system to prioritize certain tickets before others when it comes to assigning them to agents. As we discussed earlier, free users and paid users should have different SLAs and priority when it comes to servicing them. By creating a hierarchy of priority, you can guarantee that new tickets from paid users will always be distributed before any new or backlogged tickets from free users.

When working in a ticket, agents can see updated device information (app version, device model, OS version, etc) as well as customer information pulled from your system (last purchase date, number of orders, free or paid user, etc). All relevant information is presented to the agents so they can respond to customers with solutions instead of questions.

Traditionally, email is the primary communication method for customer support. When agents reply via email, how do they know that the customer actually read it? Those agents will often send follow-up emails to see if the customer actually read their previous message. That's not the best use of time for those agents.

Helpshift's in-app messaging shows timestamps of when replies were sent and read, which allows your agents to know if customers actually read their responses. You can have automatic follow-ups sent or actions completed depending upon if the customer has replied or not.. This eliminates the need for agents to manually follow-up with customers.

Further Optimization with AI

The best end-to-end experience is having a user submit a ticket and having it be resolved with the correct resolution in the shortest amount of time. Improving metrics like 'Time to First Response' and 'Time to Resolution' used to depend on agent staffing and coverage, but in today's Artificial Intelligence world, you can further lower your costs without impacting quality.

If you look at how an agent handles each support ticket, you will see that many of his/her tasks are based on objective rules and conditions. For example, if the customer writes in about a refund, the agent is tasked with sending a specific set of replies to gather more information and resolve the ticket. The agent may even add additional Tags to the ticket to further specify the product or service that was refunded as well as status on when payment would be refunded. The agent is following a set of rules that have been given to him/her and is taking time to complete them. Why pay a human agent to do this,

when an AI program can follow the same set of rules, but faster and less errors?

AI, or bots, when used correctly can greatly speed up total ticket handling time and lower your costs of running a support team. Bots don't go to the bathroom, they don't get distracted by co-workers, and they don't speed through mundane tasks just to get paid. Classifying Issues, collecting specific data, and sending templated messages can all be done in real-time by our system.

Let human agents be human! Human agents should only be involved in a ticket if a bot cannot satisfy the customer. Humans can communicate sympathy with writing and offer create solutions to the most difficult situations. Have bots be the first line of defense and put human agents as next in line--it makes the most cents.

Analyze Performance & Take Action

Your Support Operations is ans ever evolving entity. New problems arrive, app updates crash on certain devices, and new features may not be popular with customers. With Helpshift, you can easily monitor trends and patterns to identify new problems and make sure that you respond accordingly. You can share device information and logs with your Development Team to make sure that those crashes get fixed. When multiple customers are asking the same question, you can quickly create a new FAQ or modify a published one so it's easier to understand for those customers.

If the same problem is being reported by a few customers in Germany, then you'll probably be flooded with new tickets from other customers located in Germany. In order to prevent this, you can quickly send out a proactive message to the rest of your customers in Germany to let them know that you are aware of the problem and will be fixing it. This allows you to get ahead of the situation and provide a better customer experience.

Support Live Ops

As more apps and services expand internationally, the customer experience team is running 24/7 so all customers can be supported with similar SLAs. A business' product or service can be disrupted or crash, so it's important that problems are identified and resolved in the shortest amount of time. Having alerts setup in a BI tool allows Support Managers to notice spikes and work with their teams to take action.

Is there a sudden influx of new tickets about orders having a delayed delivery in the San Francisco Bay Area? Looking at the BI tool, you can quickly identify any similar patterns, and you'll easily see from your logistics partner dashboard that one of their trucks broke down on the freeway. As you escalate this internally, your shipping team communicates with your logistics partner on the status of fixing the truck. Are they going to fix the truck or send those items in a new truck from the warehouse?

As the Customer Experience Team, it's vital that you communicate timely updates to the affected customers. It might involve your content person created an FAQ article, canned response, or outbound message so customers who are affected can be notified about the issue and estimated time for the fix. You must be able to react to these issues, while at the same time take immediate proactive messages to remedy the situation as quickly as possible.

About Helpshift

Helpshift is revolutionizing the customer support experience everywhere. Through an intuitive user interface, Helpshift makes it easy for businesses large and small to proactively support and engage their customers. Helpshift's support platform includes native functionality such as in-app FAQ's, in-app chat, a full CRM ticketing system, in-app campaigns, and in-app surveys, making it easy for companies to provide a best-in-class customer support experience on any device.

Companies such as Zynga, Virgin Media, Microsoft, Western Union, Flipboard, Supercell, WordPress, and thousands of other industry-leading brands, startups, and developers use the Helpshift platform to provide in-app support. Helpshift is installed on 2 Billion devices worldwide, and serves 300+ million mobile customers monthly. To date, Helpshift has raised more than $38.2 Million and is backed by Cisco Investments, Intel Capital, Microsoft Ventures, Nexus Venture Partners, Salesforce Ventures, True Ventures, and Visionnaire Ventures.

To learn more about Helpshift, visit https://www.helpshift.com and follow @helpshift on Twitter.