



# The Ultimate Guide to Omnichannel Customer Service

How to create seamless cross-channel experiences  
and win customers for life

## Mapping the modern customer journey

Customers have changed and so have their expectations from you. Our recent [survey of 3,000 global customers](#) shows that 47% of them want more from brands than they did just two years ago. The modern customer journey isn't always linear, nor is it predictable. But customers still expect you to meet them on their terms and on the channels of their choice.

Customers today demand connected experiences regardless of the number of channels they use. Journeys filled with friction and broken conversations are no longer acceptable. In fact, 56% of customers have stopped doing business with a brand after just one bad experience.

How do you deliver on these expectations? How can you wow your customers with memorable, cohesive conversations? And most importantly, how can this help you win customers for life? Find the answers in this guide, with actionable tips to help you deliver seamless cross-channel experiences.



**67%** of global customers use 3 or more channels to engage with a brand





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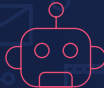
Email



Phone



Social



EXTRA CREDIT

Don't react. Predict.



The bottom line



# Self-service

76%

of global customers prefer to first try to solve issues on their own before contacting support

## Wow your customers by

- Helping them help themselves with an effective knowledge base
- Making support accessible round the clock with AI/chatbots
- Making self-service accessible across channels and third party messaging platforms





Customers today like to take control of their own journeys. Unless a resolution is beyond them, they prefer going the DIY route. You can't blame customers for wanting quick resolutions to simple or common problems. In fact, the more you empower customers to answer their own questions, the happier they are, and the less burden you place on your agents.

### 1. Make self-service available across channels

When your customers look for help, they expect to find it right where they are. For your knowledge resources to be truly useful, they need to be available across all the channels your customers might use. Artificial Intelligence is breaking new ground in creating cross-channel self-help. And you should leverage it to go the extra mile. Pop up [chatbots across your site and mobile app](#). Embed knowledge articles in your email autoresponders. You can even offer smart suggestions for common queries that your customers type into your support portal search bar.

### 2. Scale self-service with AI

The job of effective self-service is twofold. The first is to help your customers solve their own problems fast. The second is to spare your agents from having to answer routine questions. Teaching your AI-powered bot to tackle simple queries will leave your agents free to focus on complex, high-value ones.

Meet [Freddy](#), our friendly AI-powered omnibot that learns fast and solves intelligently. Freddy delights customers by replying to queries across email,

chat, voice calls and even social media. Freddy can gather information from your knowledge resources and previous cross-functional customer interactions to respond quickly with the right answers. It also transfers historic context across functions to keep answers relevant and useful to each unique customer.

*We were looking for a solution that solves for the right customer experience at scale. With Freshdesk's agility and Freddy's ability to deliver context across functions, we have achieved what we wanted to a large extent. Freddy handles as much as 60% of PhonePe's queries, working across 850 decisions while keeping satisfaction scores on par with those of human interactions.*

**Vishal Gupta**, Head of Product





### 3. Use available data intelligently

You may already have a repository of data with guides, tutorials, FAQs and everything in between. However, it is often underutilized when it comes to your self-service channels. Put your data to better use by making it accessible and consumable for your customers with bots. Our bot can read, understand and route customer questions by parsing through all your available literature. Freddy can even leverage the same knowledge repository to answer questions across email, chat, self-help portals and third-party messaging platforms.

### 4. Make sure that your bot is always learning

No one knows everything, not even your bot. Bots have to keep up with constantly changing customer expectations and evolving data. Luckily, ours loves to learn. Freddy learns continuously, both from new resources you create as well as from successfully resolved human interactions. It then applies these learnings to the next time a similar situation arises to wow customers with effective service resolutions.

### 5. Transition from bot to agent at the right time

As hard as you may try, there will be times when your self-service does not have the answers. Your bot will need to know when it isn't helping anymore and immediately transition your customer to a human agent. This obviously means that your agents will need to step in at the right time with the right context to help.

Freddy converts queries that need human support into tickets that you can assign to the right agent. Freddy also retrieves customer background to make sure your agent takes over with all information at hand.

#### » Pro Tip

In a digital world, sometimes the human touch could be what differentiates your brand from the rest. However, this shouldn't prevent you from harnessing the considerable power of bots. If you prefer that only human agents interact with your customers, bots make great [assistants for your agents](#). They can pull up context, suggest workflows to common queries, and even connect agents to colleagues who can help.

*There is such a variety of issues, that you can't know everything. (Freddy) helps agents say 'ok I can understand the problem and I can walk through it step by step to help both the customer and myself understand the situation better.' It's easy, it makes agents comfortable and that translates when they are interacting with the customer.*

**Michael Spanarella**, Customer Experience Manager





# Chat & messaging

**66%**

of global customers use Live Chat as a channel of engagement with 21% stating it as a preferred channel for support

## Wow your customers by

- Offering immediate resolutions with context
- Engaging with customers where they are (think Facebook or Whatsapp)
- Guiding your customers to the right agent with intelligent threads





Live Chat has gone from a ‘nice-to-have’ to a ‘must-have’ channel for customer service. Customers are impatient and expect immediacy. With millennials in the mix, quick and on-the-go conversations have become the new normal. Leverage technology to always be available for a chat.

### 1. Empower your agents with the context to resolve in real time

Since live chat promises rapid responses, your agents will need immediate and complete user information – including ticket history and event timelines – to quickly get up to speed on a customer’s previous interactions. From site navigation paths to prior contacts, context will help your agents respond with clarity.

[Freshchat](#), our comprehensive chat support tool facilitates this with ease. It even allows you to pull in relevant data from external systems like your CRM or other third party applications.

*The ease of use of the Freshchat interface and the contextual information displayed in the right pane has made a huge difference to our workflow, enabling our team to provide much more personalized assistance.*

Aditya Priyadarshi, Online Product Head



### 2. Chat where your customers want you to

Offer seamless chat experiences across the touchpoints that your customers actually use. Don’t restrict them to your webpage. Think [Facebook Messenger](#), [WhatsApp](#) or [Apple Business Chat](#). Map your external chats to team-member groups to ensure that they are automatically assigned and worked on. This will also allow agents to pick up conversations even when customers decide to leave and return later.

### 3. Connect your customer to the experts

Streamline your conversations by routing queries to the agents best equipped to resolve them. Set up [topic-based conversation threads](#) (like refunds, bookings or cancellations) to direct your customers along the right path. Freshchat lets you [intelligently assign](#) conversations to agents based on their skill or expertise. By automating this process, you will no longer need to keep a constant tab on what comes in and whom it should go to.

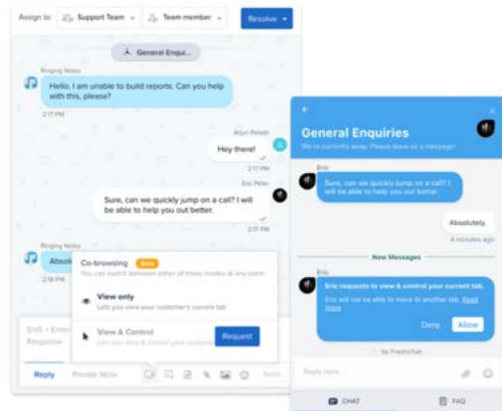




#### 4. Allow your customers to switch to voice/video with ease

Chat queries can increase in complexity along the course of a conversation. Sometimes your customers might even need some help in articulating their problem better. When this happens, allow your customer to transition with ease from live chat to a live video call to get there faster.

Freshchat's [CoBrowsing](#) feature makes this possible. With co-browsing, your agents can take your customers from a live chat to an audio/video experience with a single click. Personalized screen sharing like this can help you get on the same page to understand the problem better.



#### 5. Offer round-the-clock chat support

Unleash the power of chatbots to support customers beyond agent working hours. Our bot-builder has AI-powered conversations with your customers even when your agents are asleep. Customize your bot workflows to control what and how your bots communicate with customers. You can even prepare your bot to transition the chat conversation to other channels when the situation calls for it.

#### » Pro Tip

Customers might drift to other pages on your site mid-chat, or become inactive on your app. Keep them informed of messages they might be missing in these instances. [Notify](#) them of updates to the conversation to prevent it from breaking.



# Email

**77%**

of global customers use email as a regular channel to engage with brands and 36% of them prefer it over others for service engagements

## Wow your customers by

- Having complete context of their journey
- Not making them wait for the right agent, with intelligent assignment rules
- Resolving queries faster by helping teams collaborate efficiently



As old school as it may seem, email remains a channel that customers turn to for complicated queries. Long explanations or customizations often find their way on to this channel. Email service is a valuable opportunity to have conversations that build relationships.

### 1. Be aware of their journey

Avoid asking customers for information they have already provided. Unify your view of all customer-related data to communicate with empathy, and understand past interactions to offer relevant solutions. You need to make sure that all agents can quickly access all information pertaining to a customer - from their order details to developments along all stages of their journey, including FAQs accessed. The [Freshworks 360](#) suite makes this cross-functional and channel view possible (and easy) by unifying support, sales and marketing to deliver personalized experiences across channels.

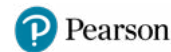
### 2. Take conversations to the right agent at the right time

Design automated workflows that route every email to the right agent, to ensure that your customers are getting the best and most efficient service. Direct queries to the best agents for the job based on their specific skills or department. Get to the most urgent queries first to prevent escalations or unhappy experiences by prioritizing your workflows.

[Freshdesk](#), our intuitive support software, automates your [ticket assignment](#) process to take queries exactly where they are meant to go. It can assign tickets to agents based on their expertise or available bandwidth with *skill-based* or *round-robin* rules. Freshdesk even allows you to set priority rules based on criteria (like the subject line or email language) to make sure that you address the most urgent ones first.

*Thanks to Freshdesk's automations, the Pearson team has been able to make sure that every support ticket got categorized, prioritized and assigned to the right support agent or author automatically; despite dealing with hundreds of publications and authors.*

**Matthijs Lok**, Marketing Manager Online

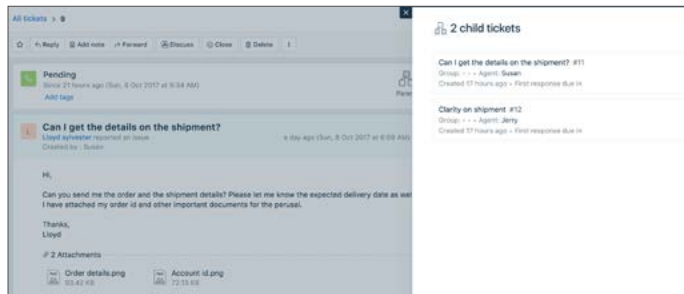




### 3. Remember that customer service is everyone's business

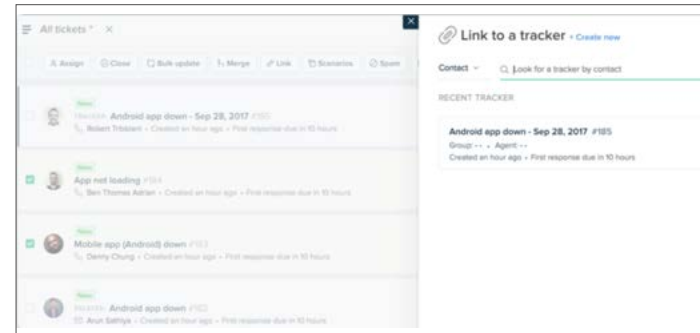
Customer service is not the function of just your support team. Your agents often need inputs from others within and beyond your organization. This could include internal teams like finance and sales or third-party partners like logistics and warehousing. If you don't allow them to collaborate efficiently, context and visibility are lost. Never keep your agents (and by extension, your customers) waiting for responses. Move out of the assembly line and get your teams to work in parallel, like a pit crew in a pitstop.

**Freshconnect**, our team communication tool, quickly brings extended teams and partners into ticket conversations to resolve issues in real time. **Share ownership** of tickets to centralize control with the primary agent. You can also divide and conquer complex tickets with our **parent-child** feature and work on parts in parallel.



### 4. Respond efficiently to common queries

Get smarter about resolving your queries. Especially ones that are asking you the same thing. Customer queries are not always unique, and neither are their solutions. Avoid wasting time on repetitive enquiries by **linking tickets** that are reporting similar issues, and address them in one go. Tie in similar tickets to a master query, and have your agent troubleshoot that master query alone, instead of multiple agents trying to fix every single instance. Freshdesk even lets you send simultaneous updates to all linked tickets.





## 5. Allow your agents to focus on what's important

Let your agents focus on what's most important, and automate the rest. Get the background tasks off your agents' minds so they do what they do best – help your customers. Simplify and quicken response times for common queries with Freshdesk's [canned responses](#) feature. You can even [automate common scenarios](#) to help your agents perform multiple actions with a single click. Enable your agents to complete all their work from right within your helpdesk and watch that translate in their interactions with customers as well. Allow autonomy to make life easier. When you let agents create their own ticket views and automations, you save precious time - for them and your customers.

*By reducing manual efforts for agents, SLA adherence has improved. With admins spending less time on manual reporting tasks, this has freed up time for management to think strategically about their customer service, which is starting to impact positively on customer satisfaction levels.*

**Vaughan Potter**, Head of Customer Services

*Hamleys*



### » Pro Tip

Go the extra mile to make your customers feel special. Look for ways to elevate their experience by studying their transactional history. For example, instead of simply offering a gift-wrap option, you can say - “I noticed that you had wanted this order gift-wrapped. Would you like to include a personalized message as well?”



# Phone

**54%**

of global customers use the phone to regularly engage with brands, while 29% of them use it for service experiences

## Wow your customers by

- Saving them the trouble of explaining themselves
- Minimizing wait times by balancing resources across channels
- Keeping communications open beyond working hours with bots



In the age of abbreviated conversations, a phone call from your customer implies urgency. Customers pick up the phone to reach you either if they are on the go, or if they need your immediate attention. Help them by being accessible and getting to the heart of the problem - fast.

### 1. Accommodate every call, but prioritize based on urgency

No customer call should ever go unanswered and the high priority calls need to get to an agent ASAP. Direct customers along the right queues to help them reach the right agent immediately. If your agent isn't available, allow them the option of leaving voicemails and missed calls. But remember this only works in your favor if the voicemails and missed calls are returned promptly.

**Freshcaller**, our cloud-hosted call center software, helps you customize routing rules to accommodate every call. It also ensures that you never miss a conversation by converting every missed call and voicemail into a ticket.

### 2. Transfer context across channels

Sometimes your customers may call you to continue or escalate a conversation they had started on another channel. At other times, you might have to call customers to follow up on conversations that were initiated at different touchpoints. Either way, information from every stage needs to be added to and transferred to every agent working on the query.

We allow our agents to add call notes to their conversations so that if tickets are transferred within the team, the new agent handling the ticket can get quick and complete historic context before offering the right resolution.

*With Freshcaller, each call is linked to a call recording and call notes so that pertinent context is readily available for all support specialists.*

**Emma Johnson**, VP of Customer Support





### 3. Do NOT make the customer repeat themselves

When customers have to speak to more than one phone support agent, make sure that they don't have to repeat themselves each time. Transfer calls with context so your agent can pick up the conversation from where it was left off.

With Freshcaller's [Warm Transfer](#) feature, agents can have a higher quality of conversation with the right context to take the conversation forward.

### 4. Do justice to all interactions by managing your load sensibly

Different channels can witness varying volumes of requests at different times. If your agents are spread too thin, their interactions will suffer, and for already anxious customers calling in, this is never a good thing.

Get smarter about managing workloads with [Omniroute](#), our patent-pending auto-assign feature that helps you manage your bandwidth intelligently. Omniroute detects workloads and volumes across channels, and assigns tickets accordingly. For example, if your agent is on a call, Omniroute will not route new tickets to him until he hangs up. Queries that come in during the interim will be assigned to other agents with less on their plate. This way, your customer gets your complete one-on-one attention.

### 5. Be there for your customers beyond your working hours

A frustrated or agitated customer will expect a response from you no matter when they call. While it is impossible to keep your agents available 24/7, you still need a workaround. Deploy bots to answer calls and tackle queries that come in beyond your working hours.

Freshcaller's [smart answer bot](#) steps in as a perfect substitute for the real thing. The bot simplifies navigation patterns and guides customers to the right solution any time an agent isn't available to help.

#### » Pro Tip

Constantly monitor your conversations to find ways that your team could be more productive or if you need to change how your agents communicate. By [monitoring calls in real time](#), you will be able to see where your agents might need to be managed, trained or supported.





# Social

**46%**

of global customers voice their appreciation or displeasure of service experiences on social networks

## Wow your customers by

- Using AI to find them in a crowd
- Speaking with context (because it's public)
- Making your efforts visible and immediate



Customers expressing their frustration on social media are likely to have already been let down by your other channels first. These customers have had a bad service experience and will not hold back on their criticisms, especially on a public channel like social media. Bad feedback is never good for business. So you need to attend to these social calls for attention on priority.

### 1. Be aware of the lead up to the post

Context has never been more important. When responding to a customer's social post, it is vital that you have complete context of their journey up to that point. Without this, you run the risk of offering a course of action that your customer has already tried without success. Asking your customers to 'contact customer support' or offering self-service articles they have already read will only (justifiably) inflame them further. Ensure that you take them forward, and not back to where they came from.



### 2. Monitor it all, but filter out the noise

There can be a LOT said about you on social media, but not everything is valuable or actionable. You need to filter the complaints and genuine requests for help from the noise to resolve them appropriately. But as important as this is, it is less than optimal to expect your support team to perform it manually. Unfortunately, risking the chance of missing posts and finding yourself battling a brand crisis isn't an option either.

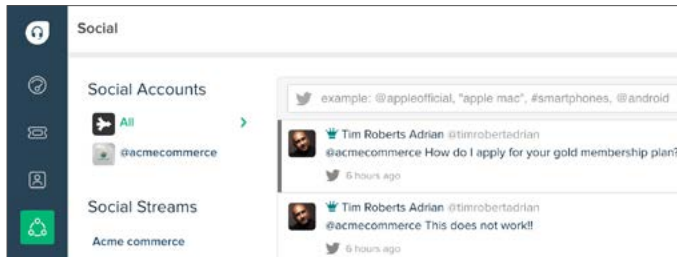
**Social Signals**, our AI-powered feature leverages its machine learning algorithm to scan your social mentions and find the ones that need your attention. Once filtered, you can assign them to the right agent or group of agents to tackle it immediately.



### 3. Acknowledge immediately, resolve fast

Once you have identified the posts that need your attention, acknowledge that you are working on it immediately. A lack of attention to the issue is most likely what brought your customer here in the first place. Even if an immediate resolution isn't possible, ensure that you respond with an apology and an update. And once you have responded, start resolving.

With [Social Signals](#), you can immediately assign the filtered tweets to a specific agent group based on the query.



### 4. Make your efforts visible

When your customer's displeasure has been made public, the steps you are taking to address it must be too. This will show anyone else who comes across the thread that you care and are capable of getting it right. When a resolution over social media isn't possible, or if you need access to private information, take the conversation offline after acknowledging it.

### 5. Put the right people on the task

You may have different teams dedicated to handling your social media presence based on the nature and volume of queries you get. This could include a social media manager or even your marketing team. They, however, may not be equipped to deliver support resolutions. Assign responsibilities across your teams to ensure that there is a clear process on how an issue is identified, assigned and tackled with, and when the customer support function steps in.

#### » Pro Tip

Build a social presence only across the channels that are relevant to your customers. Don't rely only on 'trends'. Invest in a social channel only after studying the engagement patterns of your target audience.



EXTRA CREDIT



# Don't react. Predict.

69%

of global customers prefer brands that offer proactive notifications and service

## Wow your customers by

- Anticipating their needs with data
- Avoiding roadblocks and frustrations before they arise
- Proactively keeping them in the know, before they need to ask

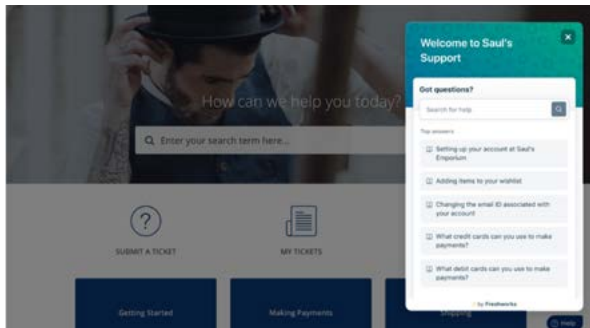




In a saturated marketplace, it is important to show your customers that you care. Customer data can help you create proactive, personalized experiences that sets you apart. Prevent issues from arising at the first sign of friction by anticipating your customers' needs and predicting when you need to intervene.

### 1. Detect signs of frustration

Look for the signs showing that your customers are having a bad time and offer a helping hand before it gets worse. 'Rage clicks' are not-so-subtle signs of an unhappy customer. Track these indications and create a way to defuse the situation by having your [help widget](#) pop up for an instant remedy. Engage meaningfully at the right time to prevent your customers from leaving in anger. You can also leverage [Freddy's conversational AI capabilities](#) across channels to offer quick help.



### 2. Inform Proactively

Don't wait for customers to ask before you inform. Deliver push notifications about things like shipping updates, booking details or product alerts on your customers' preferred channels. You can even keep customers informed about downtimes with Freshdesk's [proactive outreach](#) feature. This will prepare them for any inconveniences before they blow up into complaints.

### 3. Offer help before customers have to ask

Automate the process of initiating a proactive conversation based on specific activities. Freshdesk allows you to set conditions to trigger proactive support without your intervention. For example, you can set off proactive email outreaches to visitors from a Facebook campaign who have spent more than 10 seconds on your landing page. Or pop open a chat when a user has added items of a certain value to their cart.



# The bottom line

**70%**

of customers globally prefer brands that provide service across multiple channels



Customers today are hard to please and harder to fool. As they exercise their power of choice over channels, you need to create journeys that are seamless across them all. Here is the bottom line on how you can create cross-channel experiences that win customers for life:

### **1. Build a 360-degree view of your customer**

Learn everything you can about your customers to serve them with impact and value. Centralize all the data and information across channels and functions to create a single, panoramic view. Make the move from multiple point solutions for each to a unified one that allows seamless engagement.

### **2. Be available across channels for an integrated experience**

We know that customers cannot be restricted by channel. Establish your presence across all the touchpoints your customers expect and leverage the unique benefits of each to create the experiences they deserve. Break down channel siloes to have continuous conversations, no matter where they begin.

### **3. Deliver proactive, personalized support**

Customers know that you collect data on them. They now expect you to put this data to use to create conversations that are more relevant and personal. Use data and the power of predictive technology to remind customers that they are special to you. Anticipate what they want and offer the right kind of help.

*Helping global brands create customer-for-life experiences is what we do best at Freshworks. The Freshworks Customer Service Platform helps you engage with your customers at every step of the way and have delightful conversations at scale. Global brands like [Bridgestone](#), [Honda](#), [Rightmove](#), [Hugo Boss](#), [Citizens Advice](#), [Toshiba](#) and [Cisco](#), work with us to deliver memorable experiences. Drop by [www.freshworks.com](http://www.freshworks.com) to see what we can do for you.*



Freshworks provides customer engagement software to businesses of all sizes, making it easy for customer support, sales and marketing professionals to communicate more effectively with customers and deliver moments of wow. Freshworks offers a full suite of SaaS (Software as a Service) products that create compelling customer experiences and lets businesses share a 360 degree view of relevant customer information internally.

Founded in October 2010, Freshworks Inc., is backed by Accel, Tiger Global Management, CapitalG and Sequoia Capital India. Freshworks is a 1,800 + team headquartered in San Mateo, California, with global offices in India, UK, Australia and Germany. The company's cloud-based suite is widely used by over 150,000 businesses around the world including the NHS, Honda, Rightmove, Hugo Boss, Citizens Advice, Toshiba and Cisco.

For more information, please visit [www.freshworks.com](http://www.freshworks.com)