The Ultimate Guide to

Conversational Support

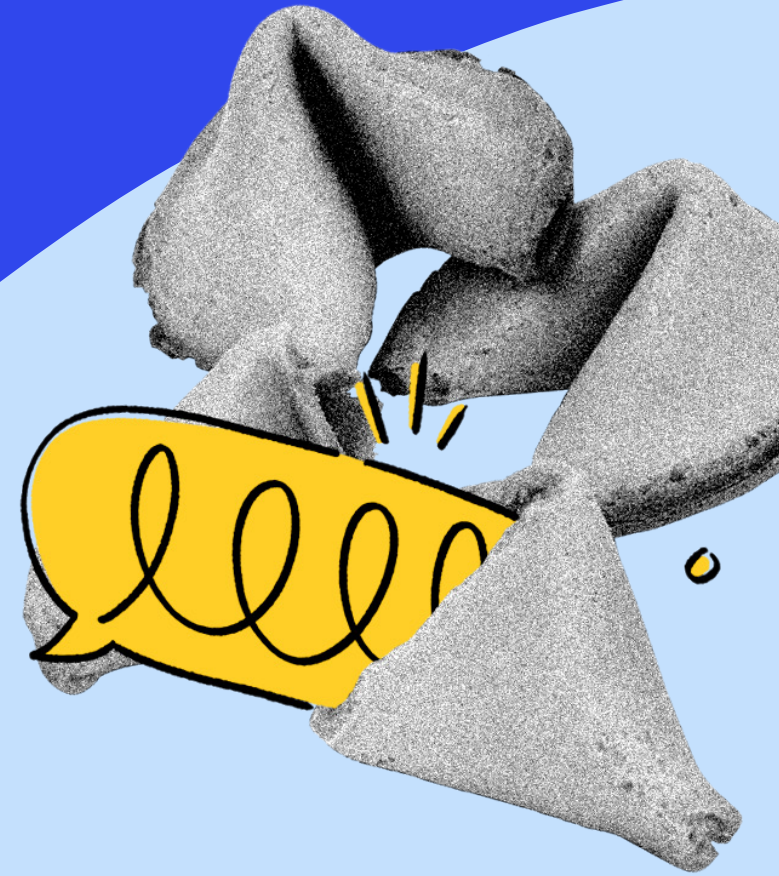INTERCOM

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The future of support is conversational

Introduction from

Kaitlin Pettersen,
Senior Director of Customer
Support at Intercom

The modern way to provide efficient, personal support at scale

Today, customer support is undergoing massive, irreversible change. Support teams are struggling to manage increasing conversation volumes. Simultaneously, 73% of support leaders say customer expectations are rising, but only 42% are sure they're meeting those expectations.

Until recently, due to technological limitations, most support teams faced an impossible choice – stay personal with customers *or* get efficient.

Staying personal meant offering expensive, unscalable services like 1:1 phone calls or 24/7 real-time chat. Efficiency meant deflecting customer issues through impersonal forms and "do not reply" emails.

This type of "good enough" customer support is no longer good enough. The antidote? Conversational support – the new way to bridge the gap between what customers want and what our teams can realistically deliver. It's the next generation way to provide customers with the fast, personal support they need through a messenger-

based experience. By combining human, self-serve, and proactive support, your team can get ahead of known problems, automatically answer repetitive queries, and quickly resolve complex issues.

Unlike messenger-based tools of the past, this is so much more than "live chat". Powered by a modern business messenger, bots, and automation, it scales your ability

to answer more questions from more customers without increasing headcount, budget, or hours logged. Even during turbulent times like the COVID-19 pandemic, it has helped us and thousands of other businesses enhance our customer relationships, streamline our processes, and maintain our high CSAT scores.

In this guide we'll share our Conversational Support Funnel framework to help you achieve similar results. You'll walk away with everything your team needs to thrive in this new conversational era, including a full end-to-end strategy, chatbot scripts, principles for staying personal, proactive message ideas, and so much more. Better team efficiency and happier, more loyal customers await.

Enjoy!

Kaitlin Pettersen

"Even during turbulent times like the COVID-19 pandemic, **conversational support has helped us and thousands of other businesses** enhance our customer relationships, streamline our processes, and maintain our high CSAT scores."

Conversational support is heating up

In a recent survey* of nearly 600 support managers and leaders we discovered that many companies – across both B2B and B2C – are already shifting their attention to conversational support and investing more in its capabilities, including proactive support, chatbots, and automation. There are five key trends leading the charge:

> "We experiment with finding the right balance between reactive and proactive support and use each interaction as the opportunity to win a loyal customer and minimize the churn."

Vlada Masevich,
Head of Customer Success at Survicate

Trend 1

From reactive to proactive support

78% of support leaders want to move from a reactive to a more proactive approach with their support.

Trend 2

Satisfying customers' need for speed

68% of support leaders that already use chatbots plan to invest more in chatbots in the coming year to speed up resolution times.

Trend 3

Supercharging team efficiency

50% of support leaders plan to invest more in automation in the coming year to increase the efficiency of their support team.

Trend 4

Bridging the customer expectation gap

27% Support teams that use chatbots to automate simple conversations are 27% more likely than those that don't to say they are prepared to meet accelerating customer expectations.

Trend 5

From "cost center" to value driver

35% Companies that use chatbot technology for support are 35% more likely to be able to track their support team ROI than those who don't.

*Intercom commissioned an independent market research firm to survey a random sample of 593 support managers and leaders based in the U.S. The study's margin of error is +/-4% at the 95% confidence level.

Both customers and support teams are reaping the rewards

As Kaitlin, Intercom's Senior Director of Customer Support, often says, "Conversational support enables support leaders to strike the balance between what's good for your company and what's good for your customers." Study after study echoes this sentiment – a well-crafted conversational support strategy brings:

> **"Resolution Bot has been a tremendous help to our team and is saving our customers 3,600 hours per month with its instant answers."**
>
> **Gabriel Madureira**,
> VP of GTM Operations at MongoDB

Happier customers

Support teams who automate support with chatbots are 30% more likely to report an increase in customer satisfaction – perhaps no surprise to modern customers who value speedy responses and close-to-instant resolutions.

More personal interactions

Oh to feel understood! 79% of customers are willing to share relevant information about themselves in exchange for contextualized interactions in which they're immediately known and understood. Gathering contextual data about your customers' issues fuels personalized help at every touchpoint.

Speedier response times

Since chatbots don't sleep they're available 24/7 to answer customer questions ASAP. They speed up response times by an average of 3 times, saving your customers time waiting and your team time replying.

Shorter resolution times

Ultimately, customers want fast, seamless resolutions – not just responses. And support teams who automate support with chatbots are 60% more likely to report an improvement in conversation resolution times.

Greater efficiency gains

Some 61% of executives said conversational bots can enhance their employees' productivity. What's more, best of breed conversational support tools empower support teams to automate manual tasks like conversation routing and prioritization so they can focus on more complex, high-value queries.

Take your support to the next level with a proven framework
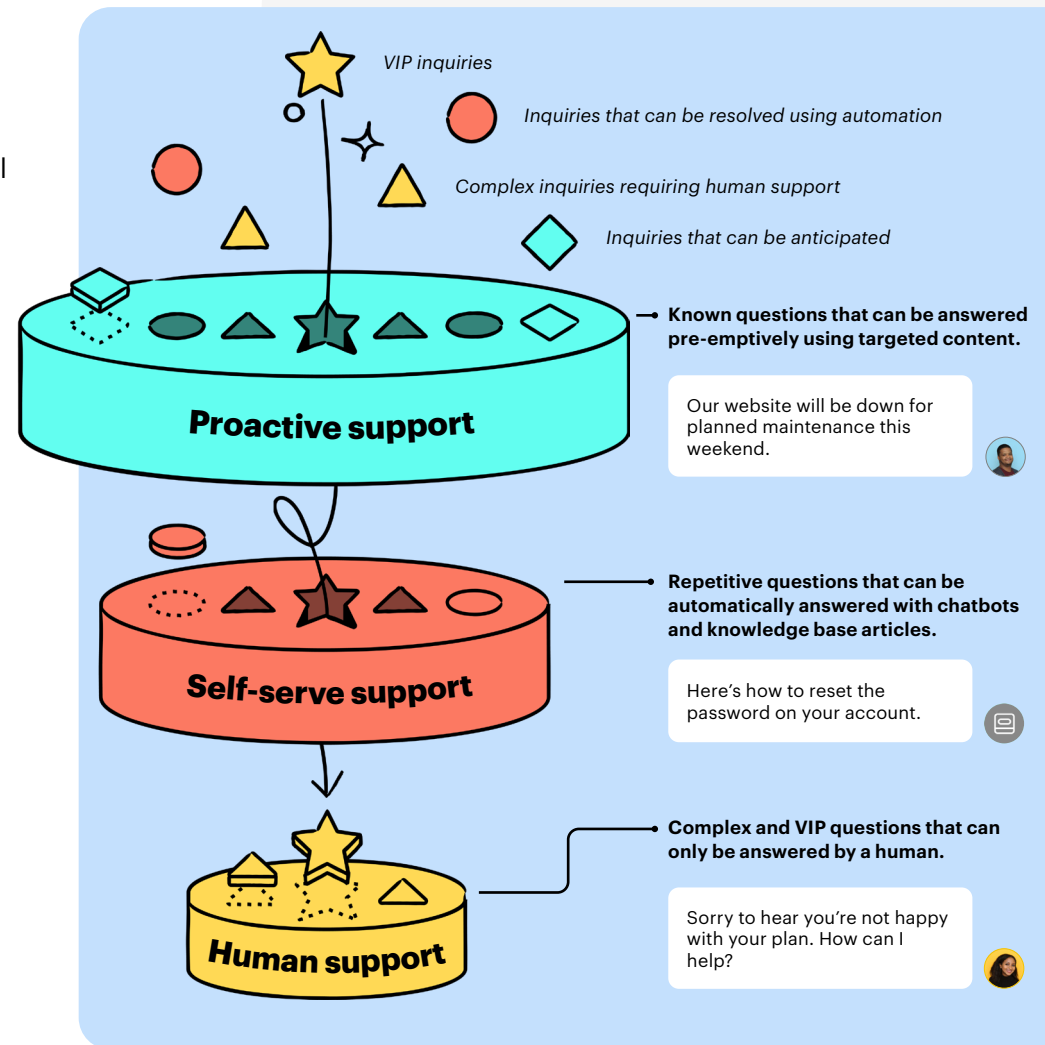
Scale up with the Conversational Support Funnel

Many support teams are worried that by adopting a conversational support approach, they'll open the support floodgates. That fear is completely valid if all you do is add a messenger to your website and let your support team manually answer every question that rolls in, regardless of priority. Of course, this approach is a recipe for conversation overload, which will result in longer wait times and customer dissatisfaction. Not to mention team burnout!

Instead, what you need is a clear framework that helps you *scale* conversational support. That

means that no matter how much your conversation volume grows or whatever resources you have on hand, you can still excel and provide customers with the fast, personal support they deserve.

At Intercom, we use a framework called the Conversational Support Funnel that combines three support layers:

- **Proactive support** which helps you get ahead of known problems before they reach your team using Outbound Messages, Product Tours, and Mobile Carousels.
- **Self-serve support** which resolves simple, repetitive queries through automated bots and contextual help content.
- **Human support** to resolve complex or VIP issues with the help of a shared Inbox and workflows.

VIP inquiries

Inquiries that can be resolved using automation

Complex inquiries requiring human support

Inquiries that can be anticipated

Proactive support

Known questions that can be answered pre-emptively using targeted content.

Our website will be down for planned maintenance this weekend.

Self-serve support

Repetitive questions that can be automatically answered with chatbots and knowledge base articles.

Here's how to reset the password on your account.

Human support

Complex and VIP questions that can only be answered by a human.

Sorry to hear you're not happy with your plan. How can I help?

With the funnel, most simple questions are answered proactively and automatically, which frees up your support team to do what they do best – using that personal, empathetic, and specialized touch to resolve the most critical queries. The funnel is completely flexible and adaptable to your business needs, even as your business scales.

In this guide we'll show you how to achieve that seemingly elusive balance between creating a kickass, efficient team and providing a world-class, personal customer experience through the funnel.

Moving from a "cost center" to a value driver

At Intercom, we've long viewed support as a revenue driver. But many teams get stuck (and we're no exception) in the day-to-day work of establishing a healthy baseline for customer experience and efficiency. So achieving this balance with the Conversational Support Funnel serves a greater objective – making space for support to become a positive force on revenue.

It's something many support leaders are actively working towards – our survey of nearly 600 support
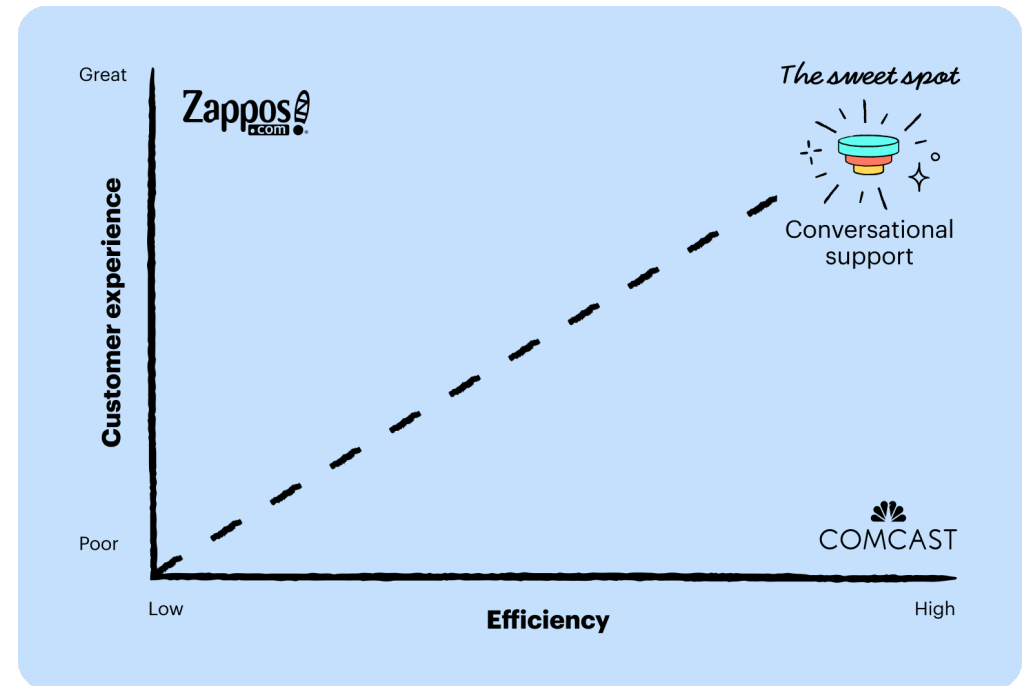
Are you like Zappos where you prioritize a great customer experience at the cost of efficiency? Or are you like Comcast where you prioritize efficiency at the cost of the customer experience? Conversational support helps you hit the sweet spot between both.

managers revealed that 30% plan to measure their team's impact on customer retention in the coming year and 25% plan to do the same for renewals.

With the funnel, you'll be able to achieve high levels of efficiency and an enjoyable, personalized customer experience. This leaves your team with more time to focus on high-value conversations, like stopping customers from churning, helping VIP customers achieve success with your product, and solving deep technical issues. Overall, you'll have more time to focus on proactively growing the business' bottom line and improving customer loyalty.

This shift in customer support mindset and strategy will come as no surprise to forward-thinking support leaders. You've been beating this "value center" drum for years: no one knows your customers and their pain points better than your support team. They're better placed than *anyone* else in your organization to:

- Share and champion the voice of the customer to help improve your product roadmap.

- Empower marketing and sales to speak to customers in ways that deeply resonate with them and increase purchases.

- Provide a great customer experience at every stage of the funnel, boosting customer loyalty and advocacy.

WOOTRIC

"Quantify your customer issues and share them out. The pain points and suggestions you hear are **opportunities for the organization to help achieve specific business goals** (e.g. adoption, retention, expansion) and your insights can drive cross-functional change."

Jessica Pfeifer,
Chief Customer Officer at Wootric

Up until now, you simply haven't had the time! This guide will help you elevate the support function within your company, so your team can go from drowning in reactive conversations (the old way) to carving out more time to become strategic, revenue-generating business partners (the new conversational way).

"We're seeing a big motion across all businesses on how an amazing customer service experience drives loyalty overall."

Tom Ronen,
Head of Customer Success at Monday.com

Traditional customer support role	Modern customer support role
• Viewed as a cost center • Focused primarily on answering repetitive queries • Lack of career growth opportunities • Solely focused on reactive support • Works as a silo	• Viewed as a value driver • Focused primarily on resolving VIP and complex queries • Opportunity for career growth and specialization • Opportunity to expand to proactive support and learn new skills • Partners closely with product, marketing, and sales

Pro tip   *Want to learn more about how to position support as the value driver it is? Check out our Intercom Academy course: "Change the conversation around support as a cost center."*

Get ahead of known issues with proactive support

Why proactive support is your first line of defense

Proactive support is at the top of the Conversational Support Funnel for a reason – it's your first line of defense. The typical support "strategy" is to let common issues roll in for support reps to address. But this approach not only overwhelms your team, it also means customers frequently have to wait hours, or even days, to get the help they need.

Proactive support is the antidote to long wait times and ticket deflection. Instead of deflecting conversations, your team can prevent issues from occurring in the first place. With

the right approach and proactive support tools, like Outbound Messages, Product Tours, Mobile Carousels, and Banners you can alert customers to known issues, like:
• Delivery delays
• Bugs in your product
• Website downtime

You can also onboard and educate new customers so they're set up for success with your product from day one and have all of the information they need to get started and overcome common hurdles, like:
• Configuring your app
• Installing it on mobile

Proactive support can drastically reduce the number of conversations that reach your support team, all

while increasing customer satisfaction and retention. So not only can you take pressure off your team – you can also demonstrate how your customer support is impacting your business' bottom line.
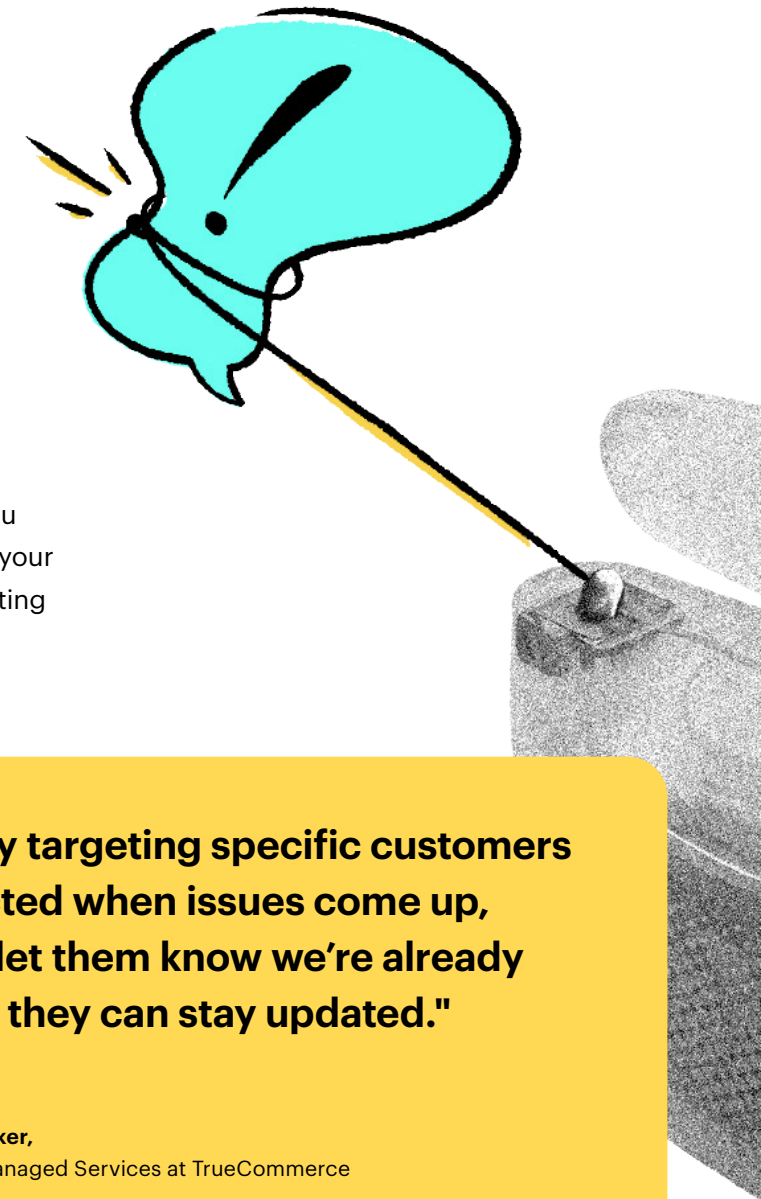
> **"By proactively targeting specific customers who are affected when issues come up, we're able to let them know we're already on it and how they can stay updated."**
>
> **Christian Parker,**
> Director of Managed Services at TrueCommerce

Identify common customer pain points and FAQs

By now, you may be thinking, "Proactive support sounds great – it's the Holy Grail of support!" But when you're so busy managing day-to-day reactive conversations, you may be wondering how you'll find time to identify common customer questions and pain points so you can begin proactively resolving issues. The right tools will automatically do a lot of the groundwork for you, preventing unnecessary headaches for your support team and helping them reclaim valuable time. Armed with these insights, you can pinpoint exactly how to boost your team's

effectiveness, improve resolution times, and enhance customer satisfaction. Here are our tips:

1. Gather valuable conversation data fast

A modern conversational support tool will automatically surface your customers' most common issues and pressing questions to your team – removing the need to manually tag conversations or go digging for details. You'll also be able to quickly see how effective your team is at resolving these issues at a glance. For example, with Intercom you can:

- View AI-powered suggestions to see the topics your customers are writing in about most.

MadKudu

"We're developing more proactive and self-serve options to make our **product stickier and increase adoption**. We want customers to be able to set themselves up easily by proactively sharing articles about new features or functionality based on actions taken within the product."

Paul Cothenet,
Co-founder & former CTO at MadKudu

• Quickly see how effective your team is at resolving each type of issue and how much time it's taking to reach a resolution.

• Unlock trends and insights from customer conversations that help improve teammate efficiency and boost customer satisfaction and loyalty.

"Intercom's Conversation Topics feature enables us to collect and surface data within a matter of minutes, and also send the product managers links to the topics so they can see conversations with the customers in context."

Jack Harrison-Sherlock,
Product Manager at Vend

☰ Reports

Top topics by volume
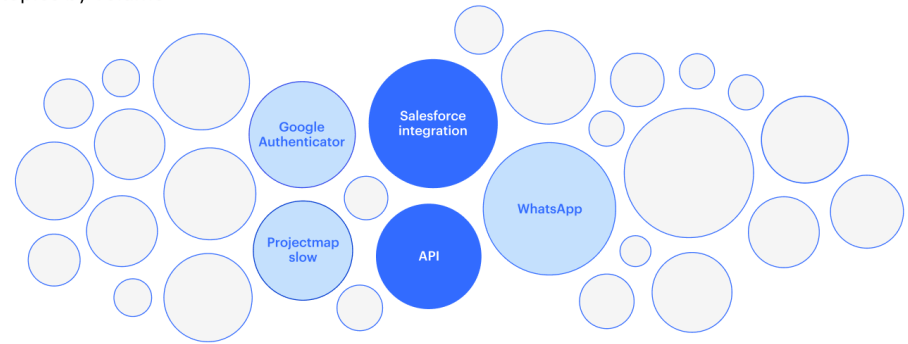
Show suggestions · ○○○ Conversation volume · ● Topics · ● Suggested topics

48 suggestions

Suggestion	Conversations	Median response time	Median time to close	Satisfaction
Google Authenticator	49,181 ▼ 6%	2h 29m ▲ 251%	2d 16h ▼ 8%	94% ▲ 0.4%
Projectmap slow	36,382 ▼ 17%	1h 18m ▼ 18%	3d 11h ▼ 29%	91% ▼ 2%
WhatsApp	29,779 ▼ 29%	2h 7m ▲ 225%	4d ▲ 1%	96% ▲ 1%

2. Partner cross-functionally for maximum impact

No support team should ever be an island. Getting ahead of customer issues and providing a great proactive customer experience is everyone's responsibility in your company, and that makes collaboration critical to success. Your support team is in a unique position – you know your customers' pain points, questions, and desires better than anyone else. Make sure your team has open lines of communication with every customer-facing team – from product to marketing to sales – so you can share eye-opening, critical insights that help drive business growth, improve your product or service, and more.

For example, at Intercom our Support team regularly:

- Shares the top topics customers have questions about with our Product Education team so they can address these topics in our Outbound Messages, Product Tours, and more.

- Surfaces top feature requests and product pain points to our Product team so they can fix mission-critical issues and create a more customer-centric roadmap.

- Partners with Sales to streamline conversation passing for a better customer experience and to maximize revenue-generation opportunities.

Clearbit

"Don't think about support like a queue that needs to be processed. Think about it like a **feedback loop** for your product that you're constantly optimizing around."
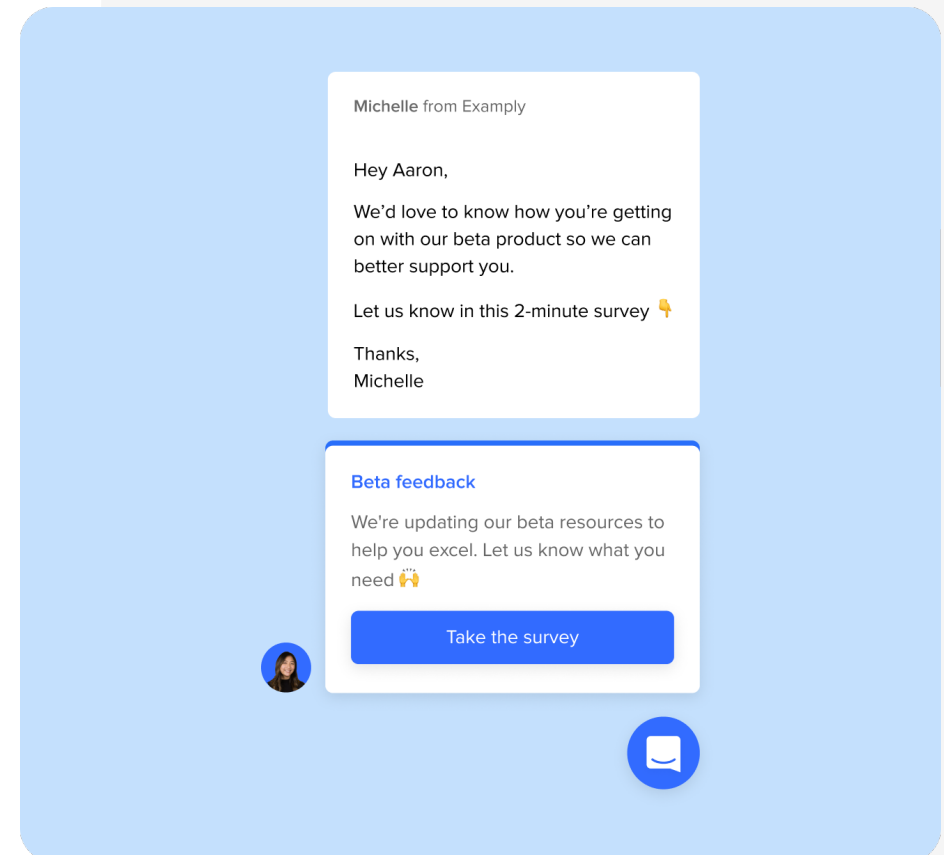
Shirley Shaw, Head of Customer Success Engineering at Clearbit

3. Create a customer feedback loop

Quantitative data is meaningful. But it won't help you fully understand all of the context behind your customers' pain points. Often, you'll be left with questions like: *Why* do they have these issues, *how* do they feel, and *where* are the stumbling blocks? While reviewing customer conversations is useful, sometimes you need a quick route to unlocking immediately actionable insights – for example, you may want to understand the "why" behind the issues new customers are facing. That's why it's important to create a qualitative customer feedback loop where customers can quickly and easily share more detail on their issues.

One of the best ways to do this is create a feedback message. For example, you can check in with customers who are trialing a beta of your new product to get context on any issues they're experiencing. Then, by the time you launch your new product you'll know the exact questions to address in your help content and the precise words to use (yes – your customers' words).

Michelle from Examply

Hey Aaron,

We'd love to know how you're getting on with our beta product so we can better support you.

Let us know in this 2-minute survey 👇

Thanks,
Michelle

Beta feedback

We're updating our beta resources to help you excel. Let us know what you need 🙌

Take the survey

Pro tip

If you're using Intercom you can quickly collect qualitative data from a customer by embedding a Typeform survey into the Intercom Messenger.
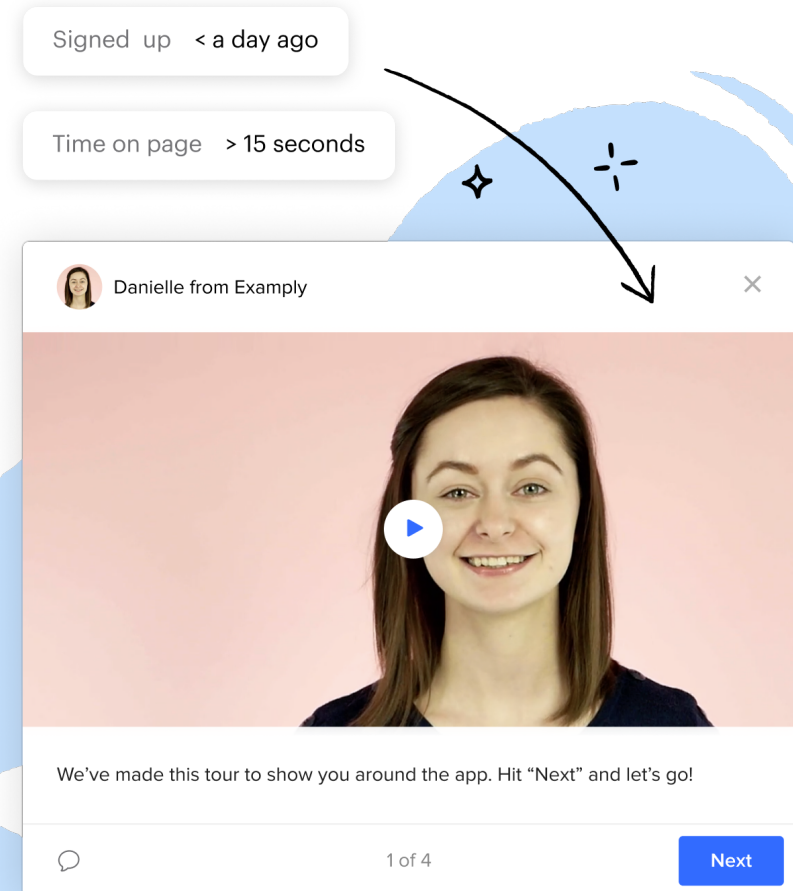
Ideas for proactive messages to send

Now that you know your customers' most common pain points, you'll have a better idea of the types of messages that will help them overcome issues, navigate tricky features, and ultimately, achieve success with your product or service. Regardless of your business type and customer needs, there are four powerful proactive messages to send:

1. Onboard new customers

There's nothing more exciting than when a new customer signs up for your product or service. But, of course, newbies will often experience a steep learning curve. That's especially true if your product or service is a little more complex. While new customers are learning the ropes, they can require quite a bit of hand-holding. Their questions are often directed at your busy support team, which can clog up your support queue.

An overflowing inbox doesn't have to be the status quo. You can set up a Product Tour or Mobile Carousel to automatically walk new customers through setting up and configuring your product, getting value up front, and navigating known pain points. Giving customers proactive guidance from the outset not only increases customer satisfaction and retention, it also helps keep your inbox clutter-free.

Signed up   < a day ago

Time on page   > 15 seconds

Danielle from Examply

We've made this tour to show you around the app. Hit "Next" and let's go!

1 of 4

Next

2. Address common stumbling blocks

When customers are browsing your website or using your product, they may encounter a stumbling block, like a processing error or not being able to find the details they need on how to use a specific feature. They'll have questions like: "Why isn't my data saving?" or "What are your shipping times?"

By proactively identifying these stumbling blocks ahead of time, you could save your customers time writing to your support team. For example, if a customer is trying to purchase an item from your e-commerce store and their payment fails, you can trigger an automated message to pop up at that exact moment with helpful troubleshooting tips.

Page contains   Shopping cart

Payment   Fails

Jane from Examply

👋 Hey there! It looks like your payment failed. Not to worry — here are four troubleshooting tips to help 👇

What do I do when my payment fails?

Troubleshooting tips for smoother payment...

Write a reply...   GIF
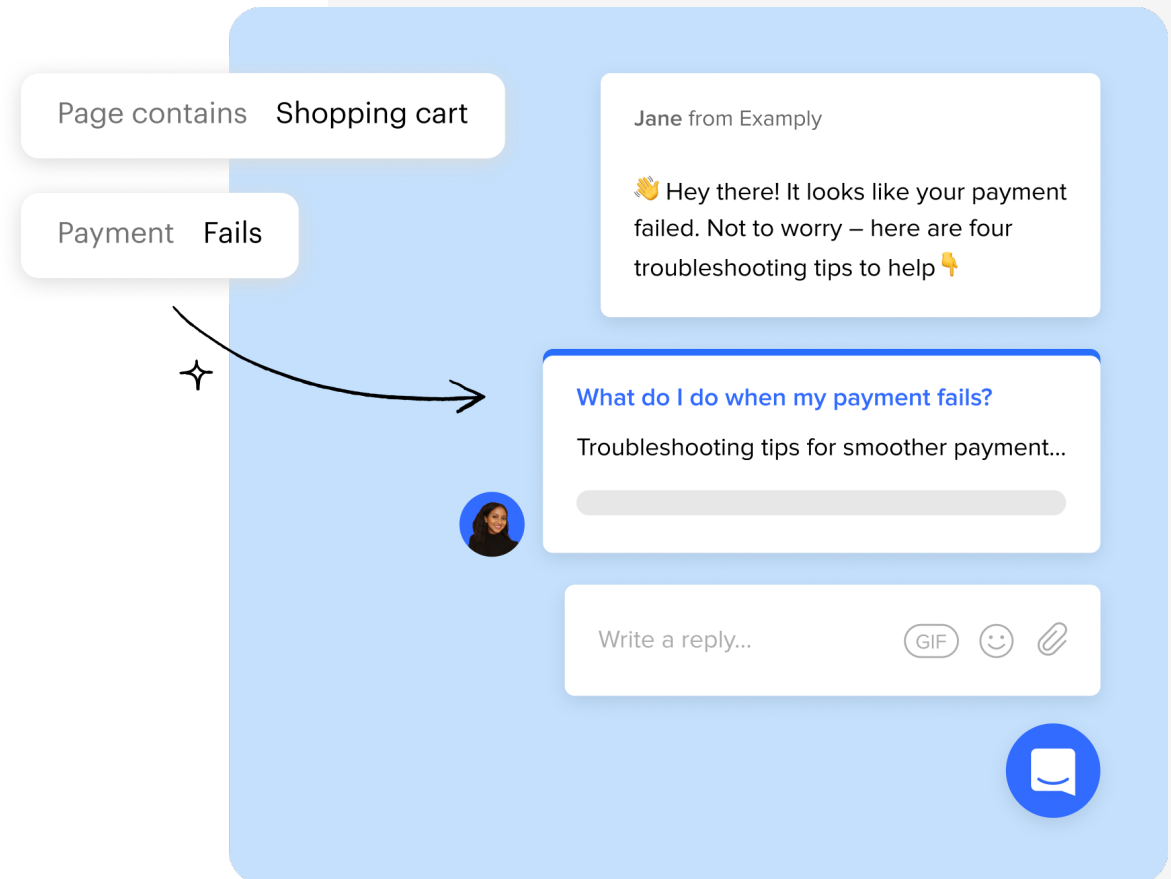
3. Educate customers on new features

Even when customers have been using your product or service for a while, when you release new features or add-ons, they're bound to have questions. Usually your team will brace for a large tsunami of queries on launch week. If you can anticipate your customers' questions ahead of time, you'll be able to reduce the tide of incoming queries. For example, you can automatically send a message to customers once they add your new feature and prompt them to check out your FAQs. This will empower them to answer their own questions in their own time.

Wayne from Examply

Hi Amanda,

Great to see you signed up for our new Finance Pro class. Got questions?

We created this handy list of FAQs to help you out — we highly recommend bookmarking it. Happy calculating 🎓

Cheers,
Wayne

Pro class added   True

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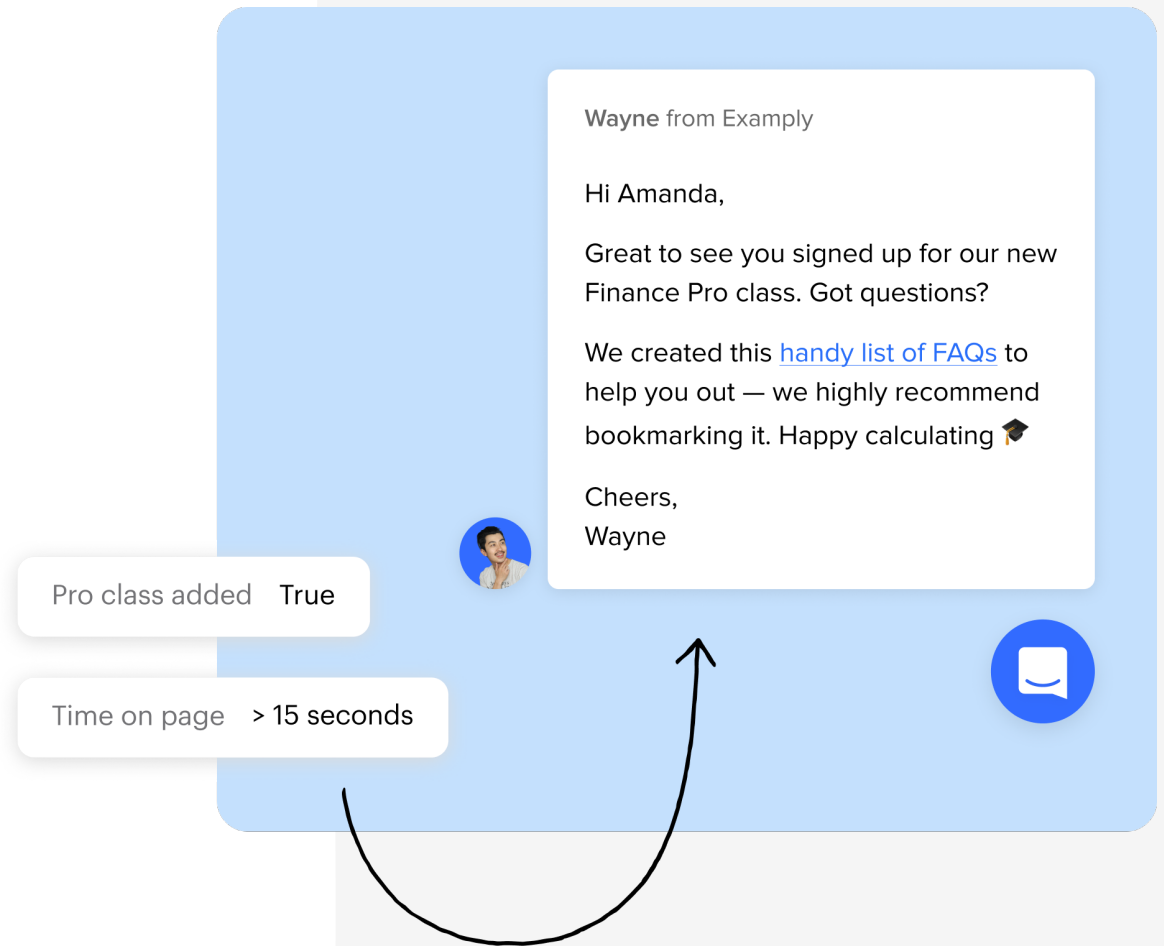
4. Alert customers to known issues

No matter how diligent your business is, day-to-day issues can occur with your product or service that can affect your customers. Think product outages, website downtime, bugs, delays with delivery – all those mission critical issues that can frustrate your customers and wipe out your team's entire day. Instead of waiting for a flood of issues to come rushing in for your team to address, you can proactively send an outbound message to flag the issue and provide help up front.

For example, if you've recently experienced a vulnerability with your premium product, you could message your premium customers who have logged in over the last 10 days prompting them to change their password.

Plan is   Premium

Logged in   < 10 days ago

9:41

Greg from Examply
Active 1h ago

Hey there,

Unfortunately we recently experienced a vulnerability with the Examply Premium Membership. Our help center article details everything you need to know. We strongly recommend changing your password.

Apologies for any inconvenience. Here's what we're doing to ensure vulnerabilities like these don't happen in future.

Best,
Greg Jones

Write a reply...   GIF

Characteristics of a powerful proactive message

Send
your message in context
(when customers need **help**)

Page contains   Shipping

Time on page   > 15 seconds

Prompt
them to check out a relevant help article

Jane from Examply

👋 Hey there! Are you looking for info about shipping? Check out this article. If you have any additional questions, just reply below. 👇

How to update shipments

How to update your shipping and...

Write a reply...   GIF 🙂 📎

Focus
on their needs

Keep
it short and sweet

Help customers in context with self-serve support
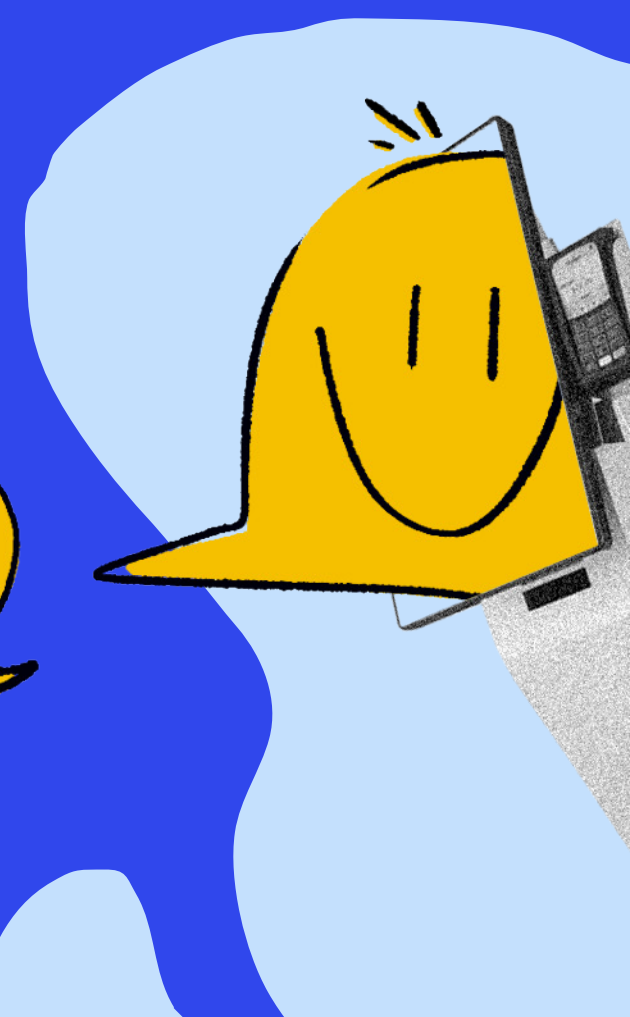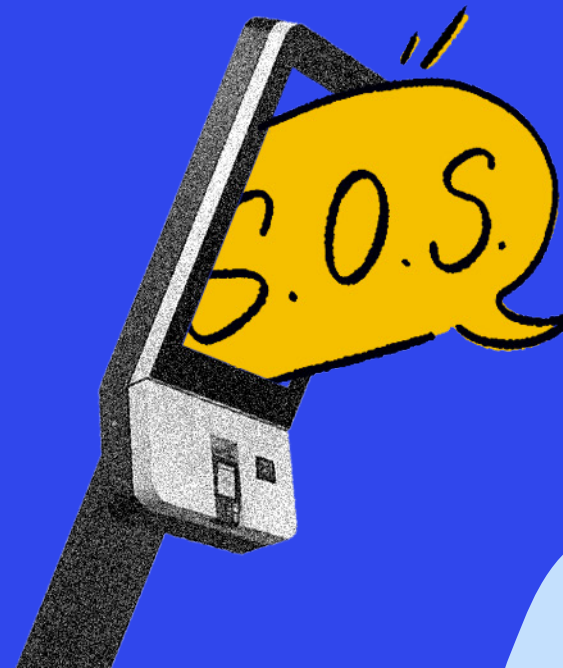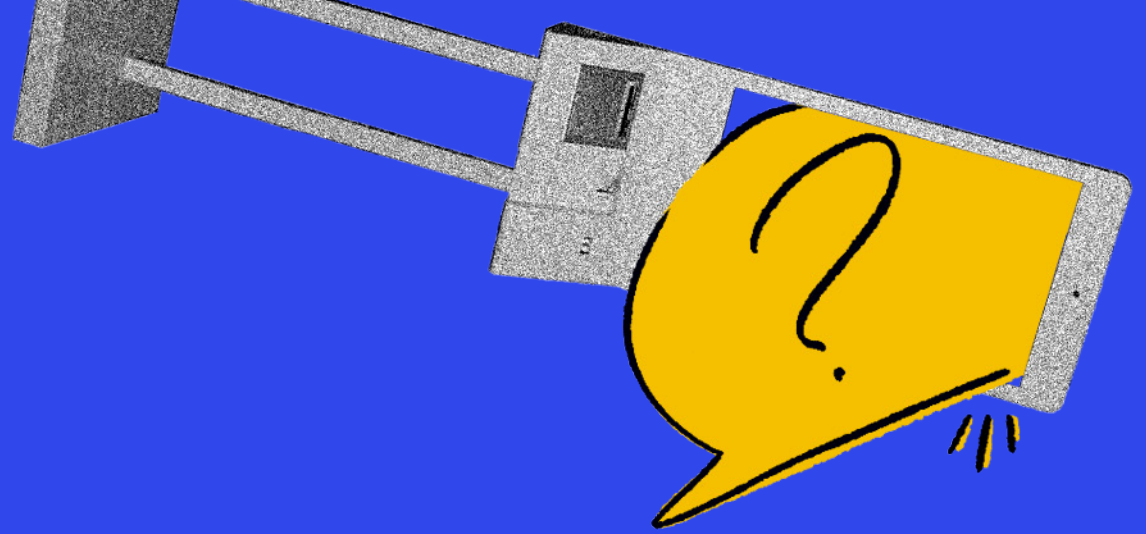
Why empowering customers to self-serve matters

"How do I update my password?" "What's your cancellation policy?" Answering simple, repetitive questions like these can feel like
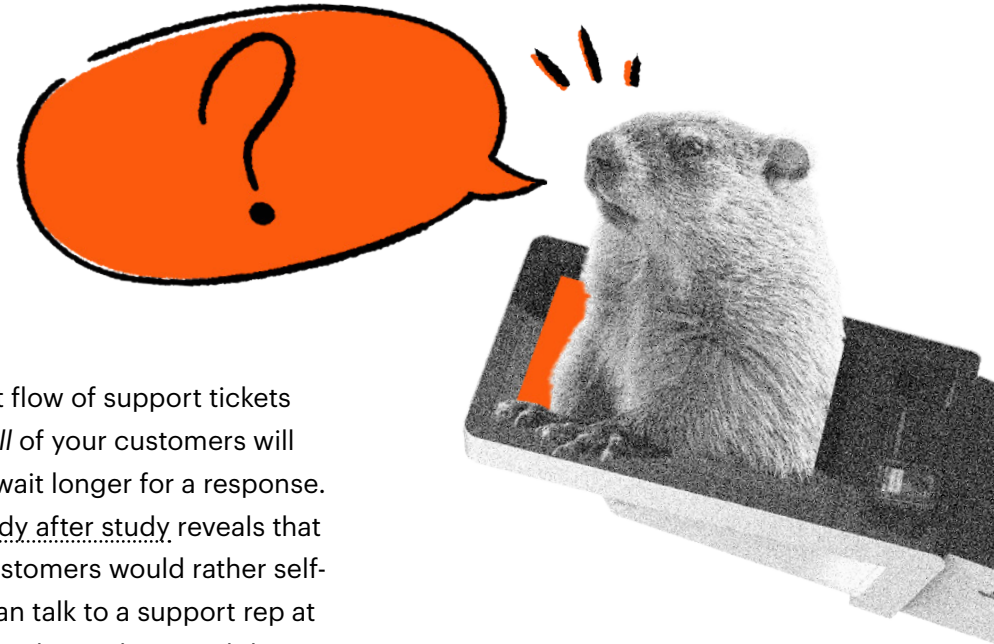
Groundhog Day for your team. Not only is this time-consuming, it's also a heavy drain on your support team's resources and morale.

No one wins when your team is stuck running up an endless ticketing treadmill – especially not your customers! Keeping pace with a

constant flow of support tickets means *all* of your customers will have to wait longer for a response. Plus, study after study reveals that many customers would rather self-serve than talk to a support rep at all. Maybe they're busy and don't fancy hanging around for a response. Or maybe they simply prefer to learn things for themselves.

Today's modern customers are used to living in an on-demand world where their every whim can be met 24/7 – think: fast food, instant news updates, and same day deliveries. Self-serve support satisfies customers' need for speed and control. With contextual knowledge base content and bots you can provide customers with on-demand

answers to simple questions, like:

- Where can I update my billing details?
- How can I return an item I bought?
- What's your typical US delivery timeframe?

Ultimately, self-serve support empowers you to scale your support and provide customers with the fast answers they need, when they need them – without upping your headcount or overstretching your team.

> **"We host an online help center with best practices, FAQs, and troubleshooting tips for all of our main features. We also leverage an automated bot to bring up relevant articles to a segment of our customers."**
>
> **Brian Abad**,
> Head of Technical Support at Amplitude

Create help content that delivers real value

Great help content compounds in value over time. The help content you create today will lay the foundations for supporting thousands, maybe even millions, of your customers for years to come. Not only will it empower your customers to self-serve, it can also provide them with proactive guidance from day one of using your product or service.

It's worth taking the time to get this right, so you can offer more help to a greater number of customers and significantly reduce your overall conversation volume in the process. Here are our tips for creating content that delivers over the long term:

Map your help content to your customers' journey

With traditional knowledge bases, the key question is often: "How can we create articles that satisfy our customers' search intent?" That's still a worthy pursuit; however, with modern conversational support tools, you can take your content one step further and deliver help in context to the right customers, at the right time. So the question then becomes, "How can we meet customers *wherever* they are?" – whether that's in your product, or browsing your website.
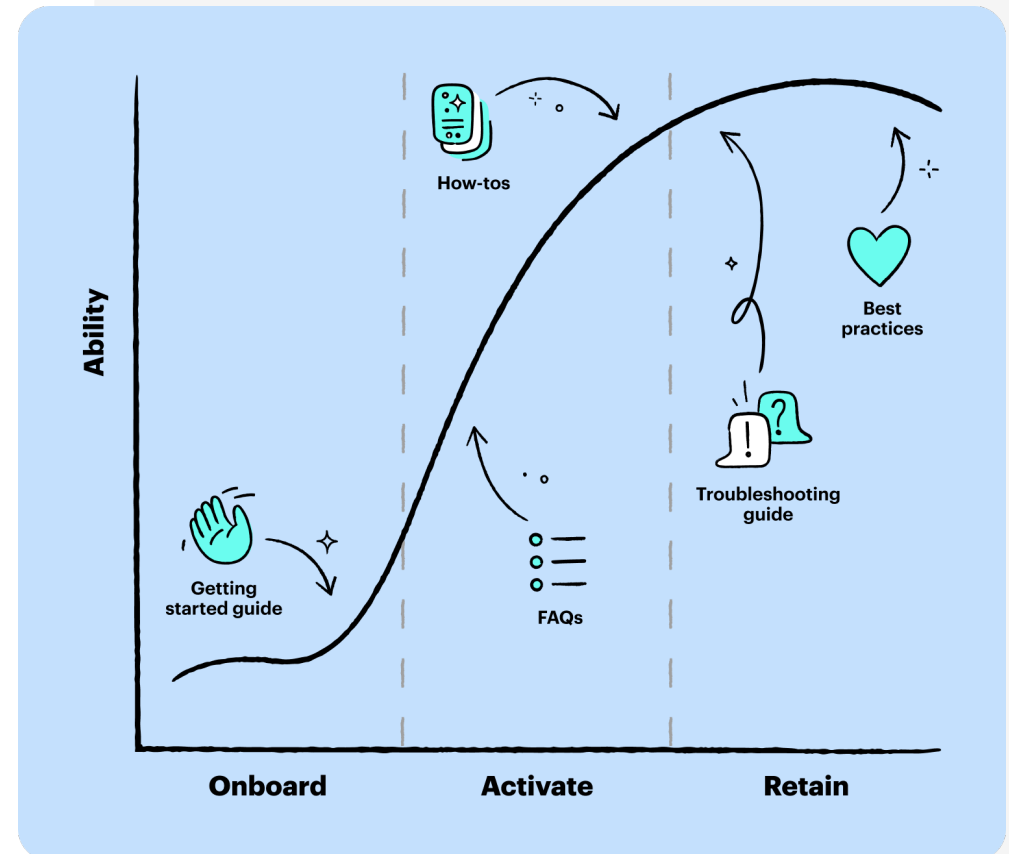
We recommend planning out the different types of articles you need to help customers at each stage of their journey. For example:

- Getting started guides are perfect for onboarding customers to new products or features.

- FAQs and how-to articles are great for activating customers and getting them up and running with your product or service.

- Best practice guides and troubleshooting articles are ideal for helping customers get value from your product, empowering them to overcome common hurdles, and ultimately, turning them into long-term, loyal customers.

SURVICATE

"We promote our help center inside the product and in communication with users. The help content allows us to **decrease support requests, boost team efficiency, and encourage adoption** of new features and products. We're getting customers to their 'aha' moments faster and inspiring active usage."
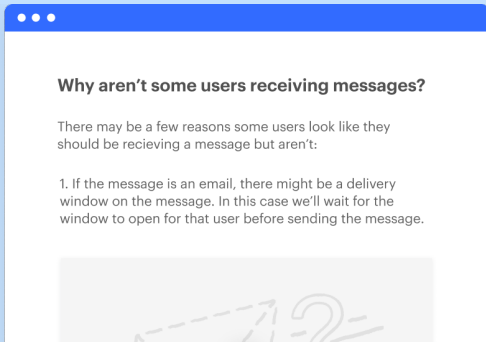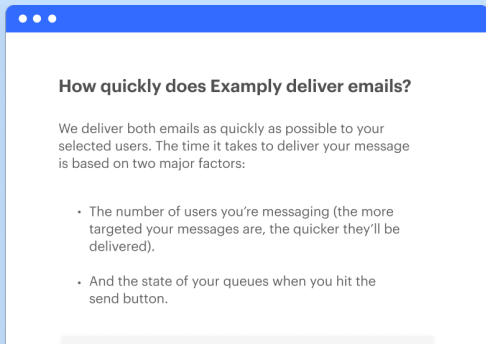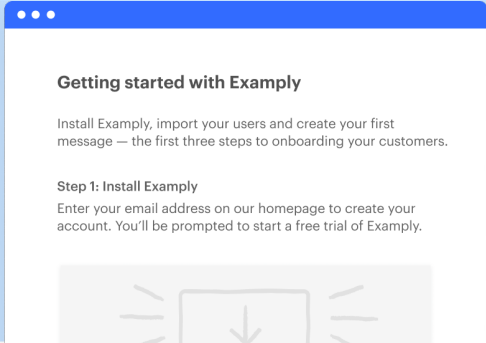
Vlada Masevich,
Head of Customer Success at Survicate

Define your funnel vision

At the planning stage, you'll also want to define where and how you'll deliver your help content within the Conversational Support Funnel. For example, when your customers are starting out with your product or service they're bound to have lots of questions. We recommend setting up your messenger to act like the receptionist of your product or website. For example, you can set up a relevant FAQ article to appear once a customer opens your messenger, helping guide them towards the help they need.

Getting started guide linked to from a product tour

Getting started with Examply

Install Examply, import your users and create your first message — the first three steps to onboarding your customers.

Step 1: Install Examply
Enter your email address on our homepage to create your account. You'll be prompted to start a free trial of Examply.

FAQ article that appears when a customer opens the messenger on relevant pages

How quickly does Examply deliver emails?

We deliver both emails as quickly as possible to your selected users. The time it takes to deliver your message is based on two major factors:

- The number of users you're messaging (the more targeted your messages are, the quicker they'll be delivered).

- And the state of your queues when you hit the send button.

Troubleshooting guide sent by a teammate

Why aren't some users receiving messages?

There may be a few reasons some users look like they should be recieving a message but aren't:

1. If the message is an email, there might be a delivery window on the message. In this case we'll wait for the window to open for that user before sending the message.

Mirror your customers' language

People don't search for your solution, they search for their problem. So, if your customers are searching for "cannot create new project", you don't want to be writing articles about "scaling database errors". Translating your product's concepts into customer-friendly language will help you optimize your help content for both search engines and bots.
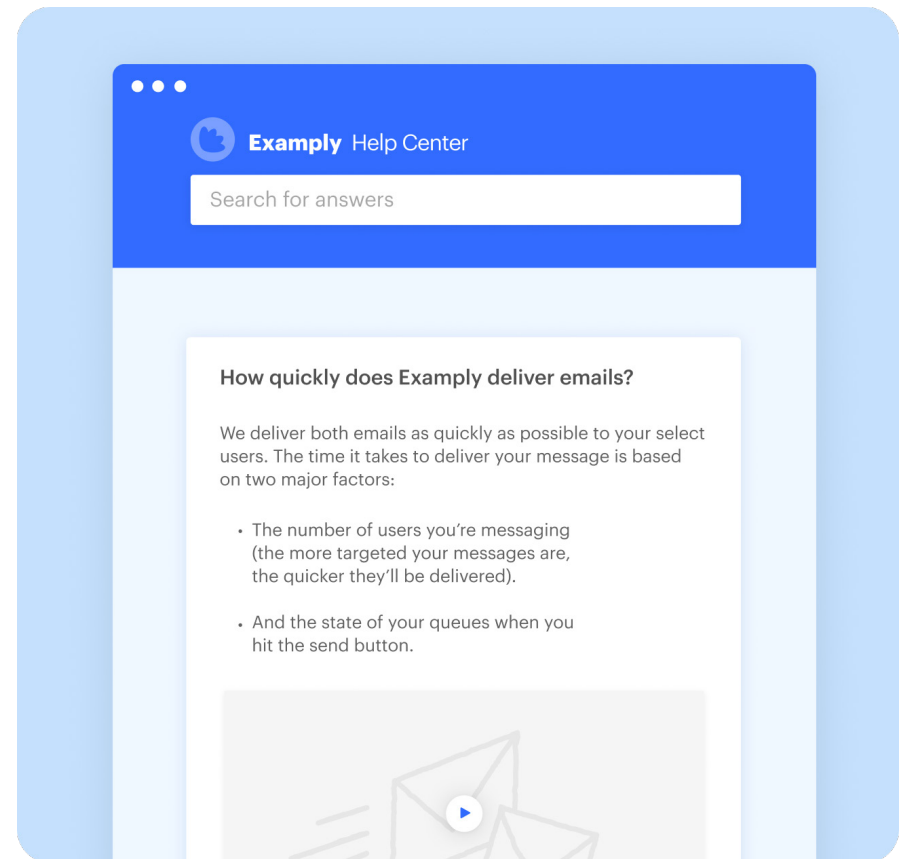
Show as well as tell

Using images, videos, and gifs removes the need for enumerating steps or writing overly wordy descriptions. Why waste your customers' time with a few paragraphs of text when you can quickly show them what to do? Use tools like Skitch to create screenshots and Droplr for gifs to help your customers quickly comprehend complex ideas.

Make your articles easy to scan

Don't bog your readers down with a wall of text – use subheadings, bulleted lists, and images to break up text, and keep sentences and paragraphs as short as possible. White space is your customers' friend.

Examply Help Center

Search for answers

How quickly does Examply deliver emails?

We deliver both emails as quickly as possible to your select users. The time it takes to deliver your message is based on two major factors:

- The number of users you're messaging (the more targeted your messages are, the quicker they'll be delivered).

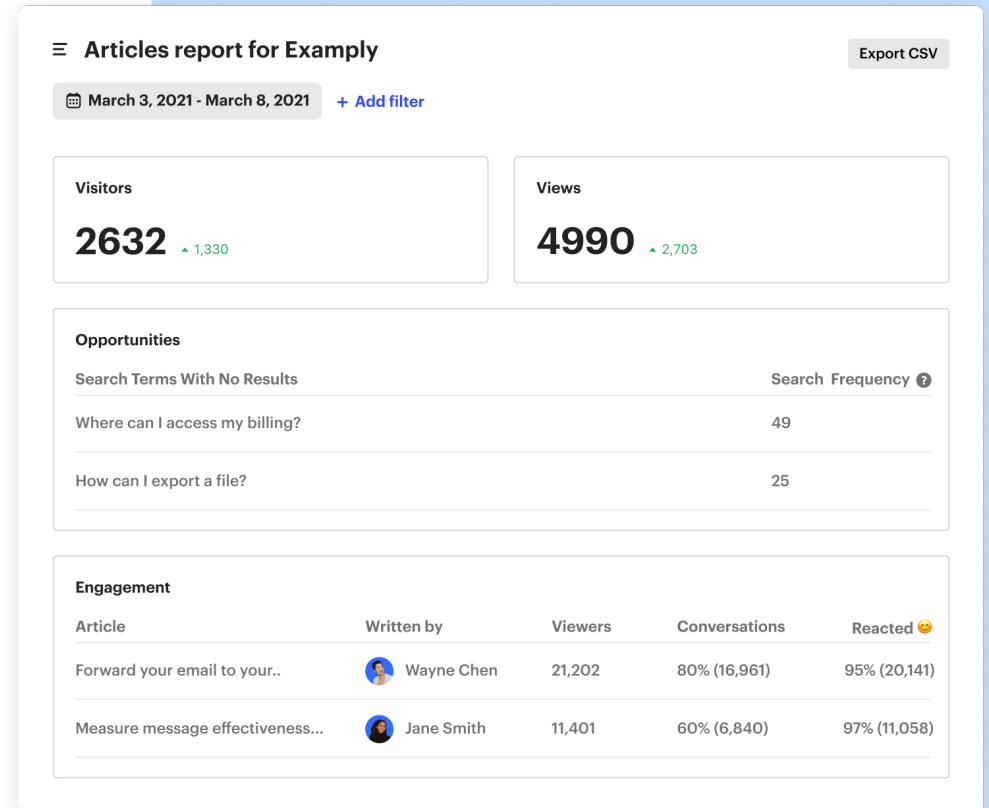- And the state of your queues when you hit the send button.

Use real-life examples

Almost all the examples we use in our help content are taken directly from our customers. That means actually talking to them and listening to their stories. Then, when a customer runs into trouble, they'll have real-life examples, not abstract use cases they can't relate to.
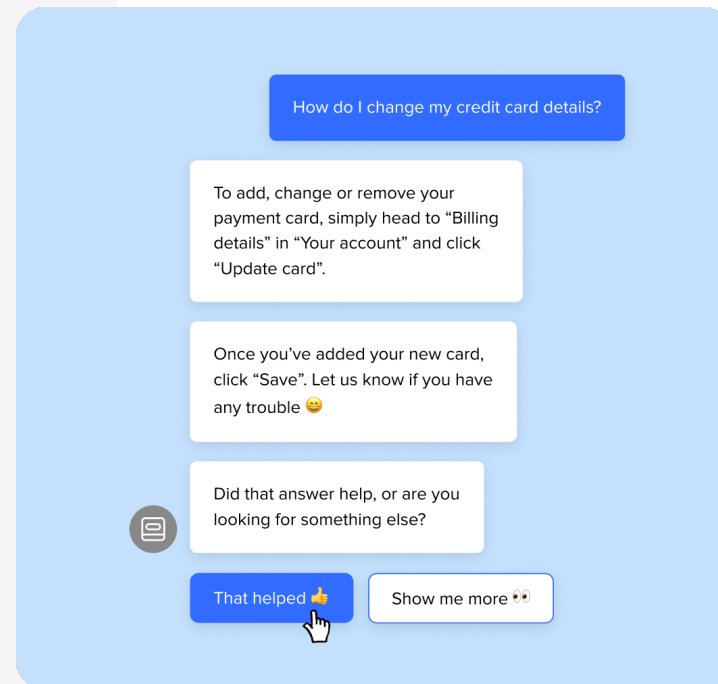
Optimize articles to work harder

Once your help content is published, don't let it go stale or become irrelevant. You'll want each piece of content to work as hard as it can for your customers and your business. With modern conversational support tools, it's easy to identify what

questions customers are most often searching for or frequently writing in with, but can't find. Then, you can go ahead and create relevant help content using the exact words your customers typed.

≡ **Articles report for Examply**   Export CSV

📅 **March 3, 2021 - March 8, 2021**   **+ Add filter**

Visitors	Views
2632 ▲ 1,330	**4990** ▲ 2,703

Opportunities

Search Terms With No Results	Search Frequency ❓
Where can I access my billing?	49
How can I export a file?	25

Engagement

Article	Written by	Viewers	Conversations	Reacted 😊
Forward your email to your..	Wayne Chen	21,202	80% (16,961)	95% (20,141)
Measure message effectiveness...	Jane Smith	11,401	60% (6,840)	97% (11,058)

Ideas for support chatbots to build

One of the most powerful ways to provide fast, personal help exactly when customers need it is through well-crafted bots. There are four powerful bots we recommend setting up.

How do I change my credit card details?

To add, change or remove your payment card, simply head to "Billing details" in "Your account" and click "Update card".

Once you've added your new card, click "Save". Let us know if you have any trouble 😄

Did that answer help, or are you looking for something else?

That helped 👍   Show me more 👀

Pro tip

The secret to ensuring your FAQ bot delivers razor-accurate answers lies in its training. First, identify the common topics your customers ask about, then create an effective answer for each common question.

1. FAQ bot

When a customer writes in with a simple question, like "How do I change my credit card details?" they expect a close-to-instant response. You can set up a chatbot to automatically resolve simple, frequent questions – our data shows that chatbots speed up response times by an average of 3X, which significantly boosts customer satisfaction.
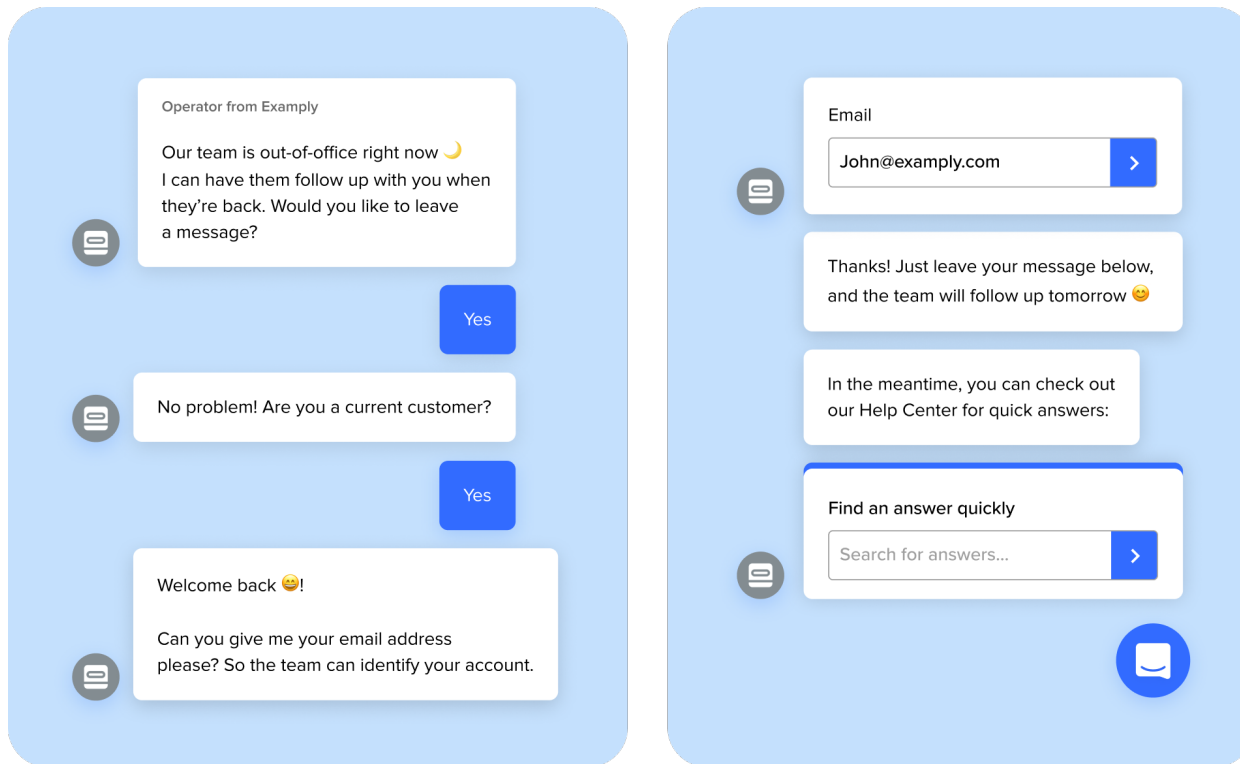
With Intercom, you can use Resolution Bot to speed up self-service even further by surfacing relevant answers based on what customers are typing – before they even hit the enter key. And you can even have your bot predict answers as soon as customers open the Messenger based on what page they're on or other contextual cues. It's our version of the FAQ bot – just supercharged!
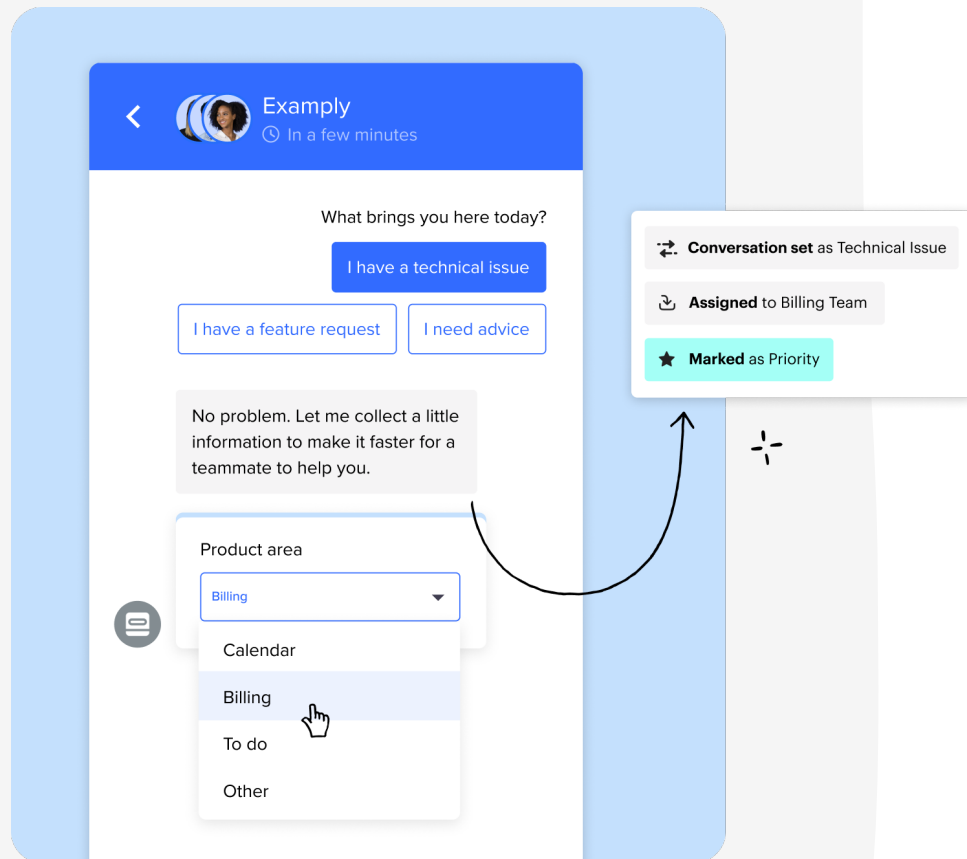
2. Triage bot

Modern customers are busy with a capital B. They don't have time to type out every detail about an issue in a lengthy email or form. Bots make it easy for customers to input important information in a way that feels lightweight, faster, and more conversational. For example, you can set up a Triage bot to prompt customers to select key details about the type of issue they have – like if it's a technical issue or feature request. Then, you can automatically route their issue to the right support team based on what they need and even mark critical issues as priority.

So, when customers write in with priority queries, like those related to their billing, they'll get the right person the first time around, rather than being put on hold or passed from rep to rep.

Operator from Examply

Our team is out-of-office right now 🌙
I can have them follow up with you when
they're back. Would you like to leave
a message?

Yes

No problem! Are you a current customer?

Yes

Welcome back 😊!

Can you give me your email address
please? So the team can identify your account.

Email

John@examply.com >

Thanks! Just leave your message below,
and the team will follow up tomorrow 😊

In the meantime, you can check out
our Help Center for quick answers:

Find an answer quickly

Search for answers... >

Pro tip

With Intercom's Custom Bots, you can offer different follow-up options to customers based on who they are and what they need. For example, you can invite customers on your premium plan to leave a message and prompt your freemium customers to visit your help center.

3. Out of Office bot

Long-lasting, quality relationships are built on trust. To lay the foundations of trust with your customers, there are three golden rules to abide by:

- Do what you say you're going to do.
- Be there when you say you're going to be there.
- Set expectations when you're not available.

Whether your team is fast asleep or snorkeling in Aruba (team offsite, anyone?), you can set up an Out of Office bot to set customer expectations 24/7 and let them know when you'll reply. Your bot can even follow up with helpful next steps, like encouraging customers to check out your FAQs in the meantime.

This also gives your support reps peace of mind – there's no need to work overtime as your bot will be there to hold the fort, answer questions when it can, and set customer expectations when it can't.
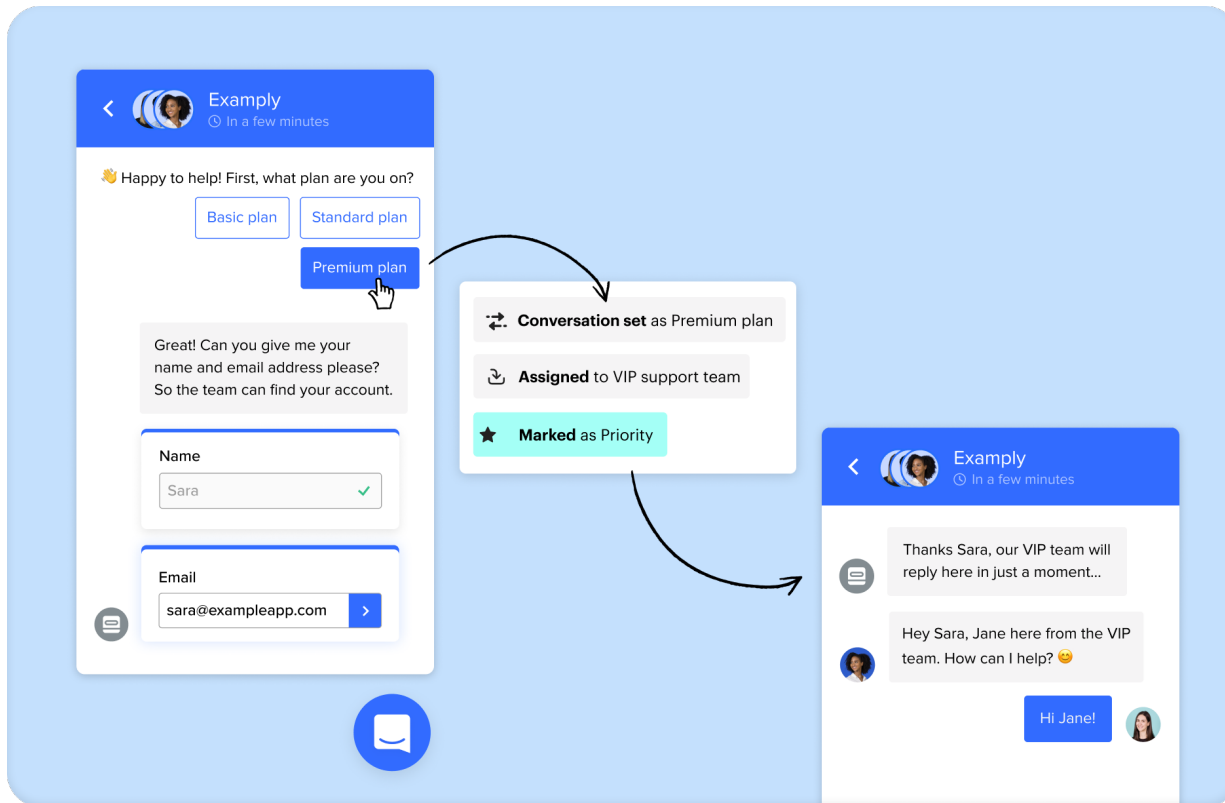
4. VIP Customer bot

Oftentimes, high-value customers, like those on your premium plan, will expect VIP support. Maybe it's even part of the package they signed up for. Either way, these customers are often larger businesses who have more complex needs and their specific issues may require a deeper investigation with your team. You can set up a VIP bot to quickly identify messages from your highest-spending customers, then escalate their messages to your VIP team, so the right support specialist can step in to reply ASAP.

Pro tip

With Intercom, you can automatically mark VIP messages as Priority ⭐ as well as routing them to your VIP inbox.

Proper botiquette: 6 principles for staying personal

There's a misconception among support leaders that bots can't be personal. The truth is that bots can (and should) be deeply personal. That said, there are a few rules that will help you get more bang from your bots and deliver better experiences for your customers. Below, we share our six rules for chatbot etiquette (or "botiquette" for short 😉):

Don't pretend it's a human

When designing a chatbot, there's often a strong temptation to give it a name, a face, even a little personality of its own. But if your customer thinks your bot is a person, they'll expect it to respond like one when it can't. That doesn't mean you can't give your bot a personality or customize it to match your brand. But "Jenny from Examply" shouldn't be ExamplyBot in disguise.

Personalize the experience

Not everyone who asks for help will need that help in the same way. Your chatbot should send customers down different paths based on who they are and what they need. For example, if a customer wants to reset their password your bot can help resolve the issue with a quick answer. If they have a bug to report, on the other hand, your bot can route the issue to the tech arm of your support team to investigate further.
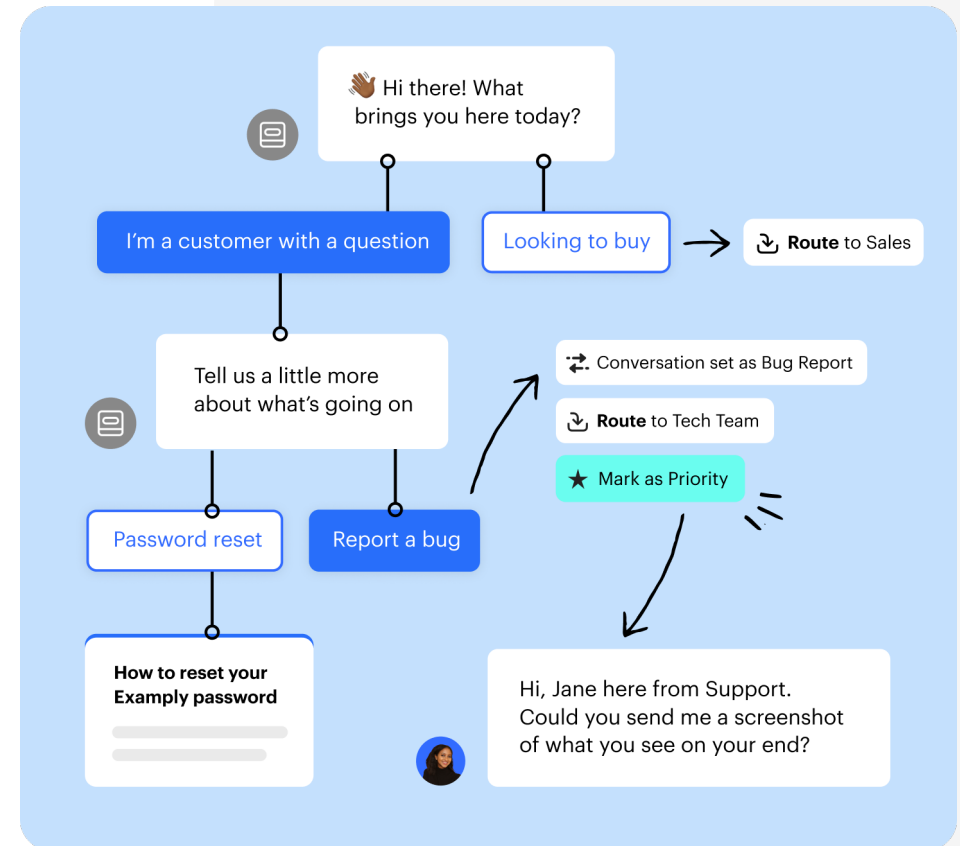
Keep it short and simple

Today, in this modern era of automation, the most personal thing you can do is resolve your customer's question as fast as possible. Chatbot interactions should be short, precise, and to the point. So, collect any information you need to make your response personal, but then give customers the help they need and get out of their way.

Set clear expectations

No matter what your business looks like, unmet and unclear expectations are the source of all heartache. A good customer experience is rooted in setting crystal clear customer expectations. When a customer writes in, set up your bot to let them know how long they're going to wait. And if the wait is on the longer side, then make sure to meet that expectation.

WOOTRIC

"Communicate expectations to customers with empathy. Good upfront clarity on resolution times does two things: **it helps team prioritization and efficiency, and it maintains transparency** with the customer – which can dramatically improve their experience."

Jessica Pfeifer,
Chief Customer Officer at Wootric

Empathy is about anticipating needs, not saying nice things

We strongly believe automated interactions can still be empathetic interactions – but empathy isn't necessarily what you think. Designing an empathetic chatbot has nothing to do with making the bot say nice things. It has everything to do with understanding your customers' context and creating bots that accurately anticipate and address their needs.

Do: **Set clear expectations**

Hey, I have a question about your pro plan.

Hey there, the team is out of the office right now 🌙, but they'll be back in a few hours.

Just leave your email address and they'll reply as soon as they can.

Email: sara@examplyapp.com

Thanks so much, Sara! 😃

Don't: **Leave people guessing**

Hey, I have a question about your pro plan.

Awesome, so glad you got in touch. Our team can't wait to reply.

Okay. thanks. When will that be? How will they get in touch?

Hello?

...anyone there?

Provide an escape hatch

The last thing you want is for your customers to feel like they're trapped in the chatbot equivalent of a phone tree. "Press 9 to hear these options again" is a far worse experience than letting them disengage from your bot entirely and providing clear next steps for how to find help. If your customer has engaged with a bot, and it's not going well for them, there should be an easy way out – whether that's:

- Letting them chat directly with your team.

- Or giving them clear next steps, like encouraging them to check out a list of your most popular FAQs.

Do: Give people a way out

Hi, how can I find out if my order shipped?

Hi Kelly 👋 You can check your order status here:

My orders

Order #1009
14 Jan 2021 • Delivered

Order #1008
18 Feb 2021 • Not shipped

Did that help, or are you looking for something else?

That helped 👍   Show me more 👀

Wait for the team 💬

Don't: Trap people in a bot loop

Hi, how can I find out if my order shipped?

Hi Kelly 👋 You can check your order status here:

My orders

Order #1009
14 Jan 2021 • Delivered

Order #1008
18 Feb 2021 • Not shipped

It hasn't shipped yet and it's due to arrive today. Can I talk to someone?

Glad we could help 🙌. Would you like to rate our customer service?

What? No! I need to talk to someone. My delivery is late!

Be personal and efficient with human support

Why complex conversations require a human touch

There's an inescapable fact in support: not every answer can or should be automated. After all, not even the best chatbot can help calm an angry customer, investigate a thorny issue, or build a rapport with high-value customers quite like your team can. These types of issues require an empathetic, human touch.

Human support is an essential part of any successful support strategy, but the reality is that it doesn't scale

and it's expensive to operate. It's also a waste of your support team's expertise and resources if they need to answer *every* question that rolls in – regardless of each issue's priority, how urgent it is, or how much the customer is spending with you. Instead, you'll want to free up your team's workload so they can focus on high-value, complex queries that make use of their product knowledge, technical expertise, and empathy skills. With the Conversational Support Funnel, self-serve and proactive support will automatically take care of the mundane, repetitive questions. That leaves your team with more hours and headspace to provide real value where it's needed most, like:

- Issues from VIP customers
- Emotionally-charged complaints
- Complex troubleshooting issues

And even with these types of questions, there's no need to go it alone. Optimizing your automation, team workflows, and personal support principles will help your team provide the right customers with the world-class, fast, personal support they deserve.

> **"If somebody on my team can make a process happen with one click – or no clicks – all the better, because it means they can spend that time actually building a relationship with the customer."**
>
> **Ian MacLean**,
> Global Head of Customer Care at Aircall

Supercharge your team efficiency with automation and apps

Your support team may *appear* to possess superhero powers, like the ability to calm angry customers, translate technical issues into easy-to-understand solutions, and solve complex problems. *But* they're still human, and being human comes with productivity limits. Some of your biggest efficiency gains won't come from the hands of your support reps at all, but from the backend of a well-oiled, automated inbox.

It's worth making your workflows as efficient as possible. Taking mundane, repetitive tasks off your team's hands will add more fuel to their tank and leave them with more time to better support your customers. Here are some powerful foundational steps to take:

Automate your inbox workflows

"Can I put you on hold?" "Let me pass you to my colleague." If you've ever been on the receiving end of this type of ping pong support as a customer, you'll know how frustrating it is to be passed from rep to rep. It wastes both the agent's and the customer's time.

A far more efficient (and polite) approach is to set up a workflow that automatically collects conversation data from your customer on what their query is about – whether that's a billing query, a technical issue, or something else. Then route the conversation to the right team, like your billing team, so they can step in and provide the customer with a speedy, empathetic response.

This also means your team won't have to spend time manually tagging conversations to identify common customer pain points for your proactive support.

Prioritize VIP and urgent conversations

When a VIP customer gets in touch, you'll want to fast-track the issue to your VIP team so they can reply ASAP.
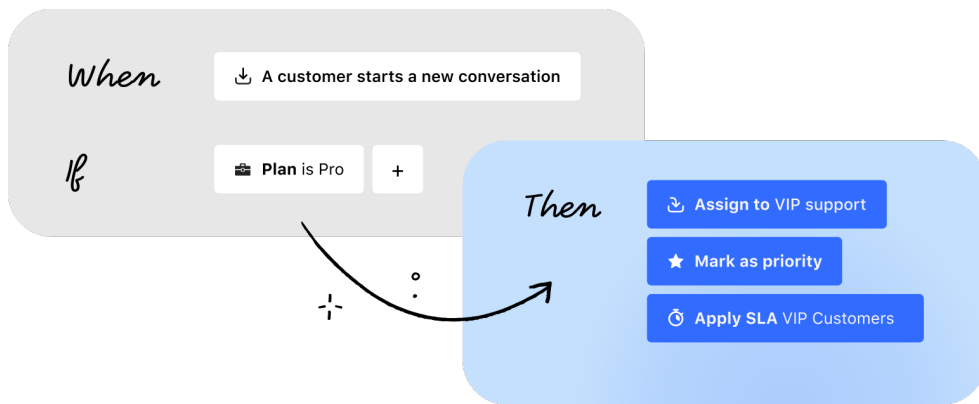
With a modern conversational support tool, like Intercom, you can apply multiple automated rules within each workflow. For example, you can mark these pressing issues as priority and apply an SLA rule to hold your team accountable to delivering a top quality, rapid response.

Seamlessly manage all of your tools from one inbox

Some 68% of support leaders say their team hit roadblocks once a month because their support stack isn't integrated with technology from other teams. What's more, the majority of support teams have between six and 10 tools in their support tech stack alone. Imagine how many wasted hours your team is racking up switching between all these tools, not to mention the headaches.

> **"Adding apps to Inbox has empowered our support team to quickly and accurately resolve customer questions. With the adoption of apps we have decreased our median first response time by 18%."**
>
> **June Zhang**, Technical Support Manager at Guru

When ⤓ A customer starts a new conversation

If 💼 **Plan** is Pro +

Then ⤓ **Assign to** VIP support
★ **Mark as priority**
⏱ **Apply SLA** VIP Customers

Whatever tools you're using – whether that's social media, call center, issue management, or even sales tools – you'll want to make sure your conversational support tool can plug into and play nicely with them. Ultimately, this will make your support more efficient, powerful, and all-around more helpful for customers.

With Intercom, there are lots of useful apps you can integrate with and use right from the Inbox to streamline your support. For example:

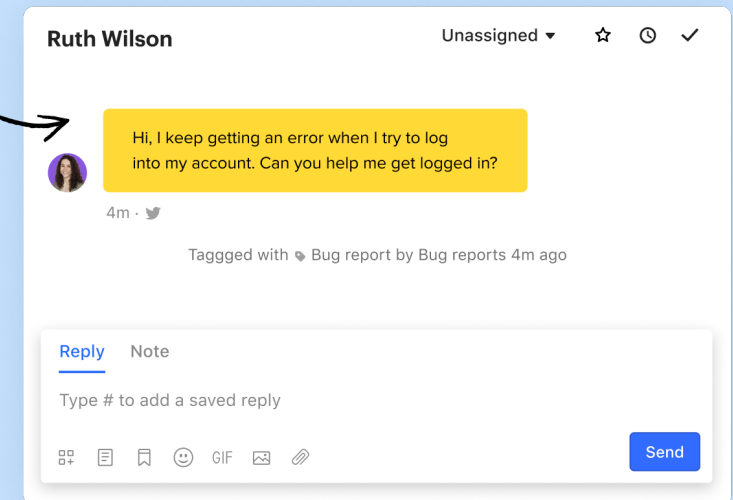- You can connect with your favorite tools, such as Github, Stripe, Shopify, and Salesforce, to take key actions and view third-party data right from the Inbox. That means you can get further context on issues, check in on order statuses, manage subscriptions, process payments, and lots more – all without switching to another app and potentially losing context.

- The Aircall app lets you start a quick phone call with a customer from the Inbox. It provides a fast, easy, and delightful experience for your customers too as they can join the call directly from the Messenger.

- Twitter and Facebook apps automatically pull your direct messages into the Inbox. Instead of your team spending large chunks of their day frequently checking social media channels, they can manage these conversations right from the Inbox too.

Twitter

Ruth Wilson
@RuthWilson

@Intercom Hi, I keep getting an error when I try to log into my account. Can you help me get logged in?

Intercom Inbox

Ruth Wilson   Unassigned ▾   ☆ ⏱ ✓

Hi, I keep getting an error when I try to log into my account. Can you help me get logged in?

4m · 🐦

Taggged with 🏷 Bug report by Bug reports 4m ago
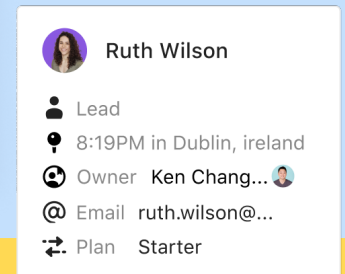
Reply   Note
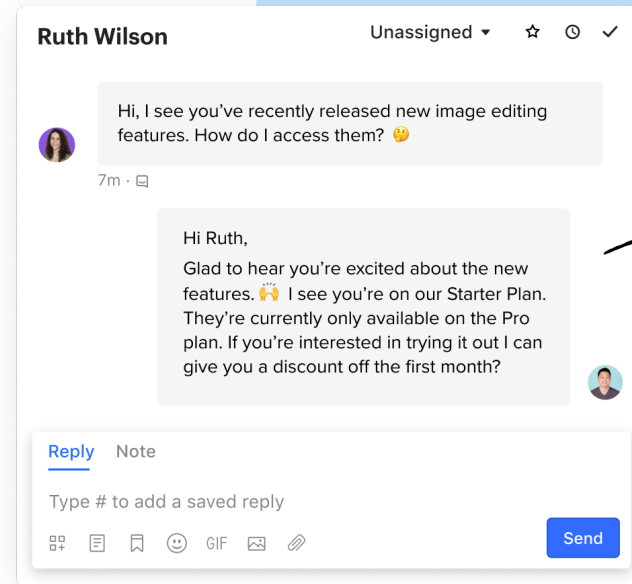
Type # to add a saved reply

Send

5 principles for an empathetic, human response

Of course, speed is just one part of a great customer experience equation. The other part is helping your support team provide a personal, authentic, and genuinely helpful response to every customer they interact with. For this, we recommend creating a set of guiding principles your team can use as their conversational support North Star. Here are some of our favorite principles we use at Intercom:

1. Be personal

Nothing says "I don't value your business" like a canned, generic response. With modern support tools, you can quickly view rich context about each customer, like which plan they're on, what company they work for, and whether they've been in touch before with a similar issue. These personal details can help you quickly understand who the customer is and what they need, without asking lots of introductory questions. Then, you can use these details to resolve the issue in a faster, more empathetic way.

Ruth Wilson — Unassigned

Hi, I see you've recently released new image editing features. How do I access them? 🤔

7m

Hi Ruth,
Glad to hear you're excited about the new features. 🙌 I see you're on our Starter Plan. They're currently only available on the Pro plan. If you're interested in trying it out I can give you a discount off the first month?

Reply Note

Type # to add a saved reply

Send

Ruth Wilson
Lead
8:19PM in Dublin, ireland
Owner Ken Chang...
Email ruth.wilson@...
Plan Starter

> **"When someone writes to us, we should know who they are, what their experience has been leading up to that, and make it feel like they're reaching out to a friend who's there to help, versus a case number."**
>
> **Kristen Swanson,**
> Senior Director of Customer Insight at Slack

2. Explain things in multiple ways

Different ways of communicating resonate with different people. Be prepared to explain the same thing in a bunch of different ways – in a bulleted list, with a gif, emoji, or a well-annotated screenshot. However you choose to help your customers, make sure you show, rather than just tell. It's a great way of illustrating "how-tos" in your product.
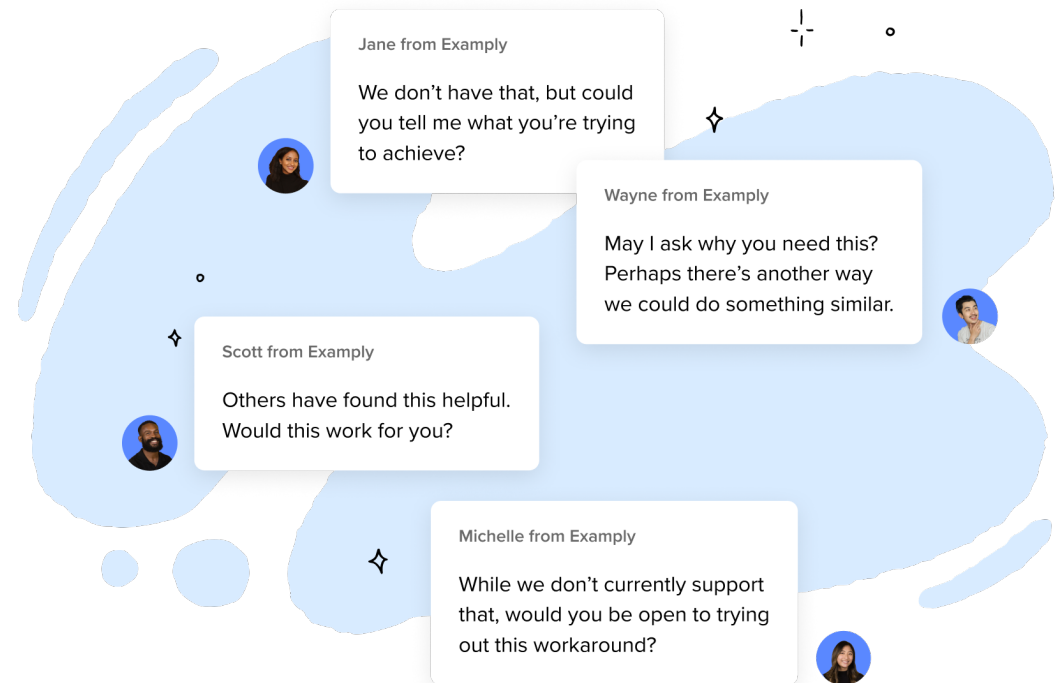
3. Know your product or service inside out

When new features are being added, or old ones removed, your product knowledge becomes stale a lot quicker than you think. You should be an up-to-date encyclopedia of knowledge about how your product or service works and what it's capable of. Partner with your product team to understand new releases ahead of time.

## 4. Don't just "address" issues, resolve them

Reaching resolution means that the customer is satisfied – whether you've solved their problem or not. Don't avoid difficult conversations or say no without any explanation. Saying yes to every request only leads to mistrust between customers and your business. When a customer trusts that you've considered their problem, and given them an honest response, you'll reach resolution far quicker.

Focus on the customer's job, not the "no"

Jane from Examply

We don't have that, but could you tell me what you're trying to achieve?

Wayne from Examply

May I ask why you need this? Perhaps there's another way we could do something similar.

Scott from Examply

Others have found this helpful. Would this work for you?

Michelle from Examply

While we don't currently support that, would you be open to trying out this workaround?

**5. Watch your tone with the PREACH framework**

Often in life, it's not what you say but *how* you say it that makes all the difference. Getting your company's tone of voice just right is incredibly important, especially when you're dealing with a tricky or emotionally-charged conversation. At Intercom, we use the PREACH tone of voice framework to ensure we're consistently providing customers with the fast, personal, and transparent support they deserve.
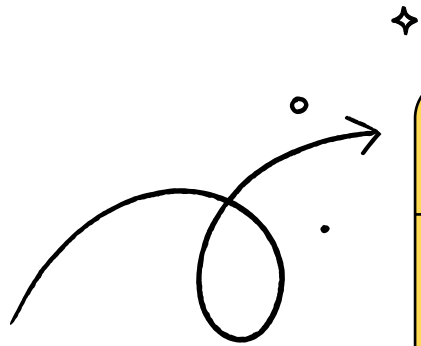
*P*roud	Own your mission and its impact. Don't apologize for features you never plan to build.
*R*esponsible	If a bug ships and a customer is disappointed or frustrated, take ownership and then move forward.
*E*mpathetic	Truly understand how your customers feel and handle each conversation accordingly. Match their tone of voice.
*A*rticulate	Good writing matters. Correct typos, bad punctuation, and poor phrasing before hitting "send".
*C*oncise	Never forget customers contacted you for a reason. Get to the point and resolve their issue ASAP.
*H*uman	If you wouldn't say the words in a "normal" spoken interaction, don't say them during a customer interaction.

Measure and optimize your conversational support strategy
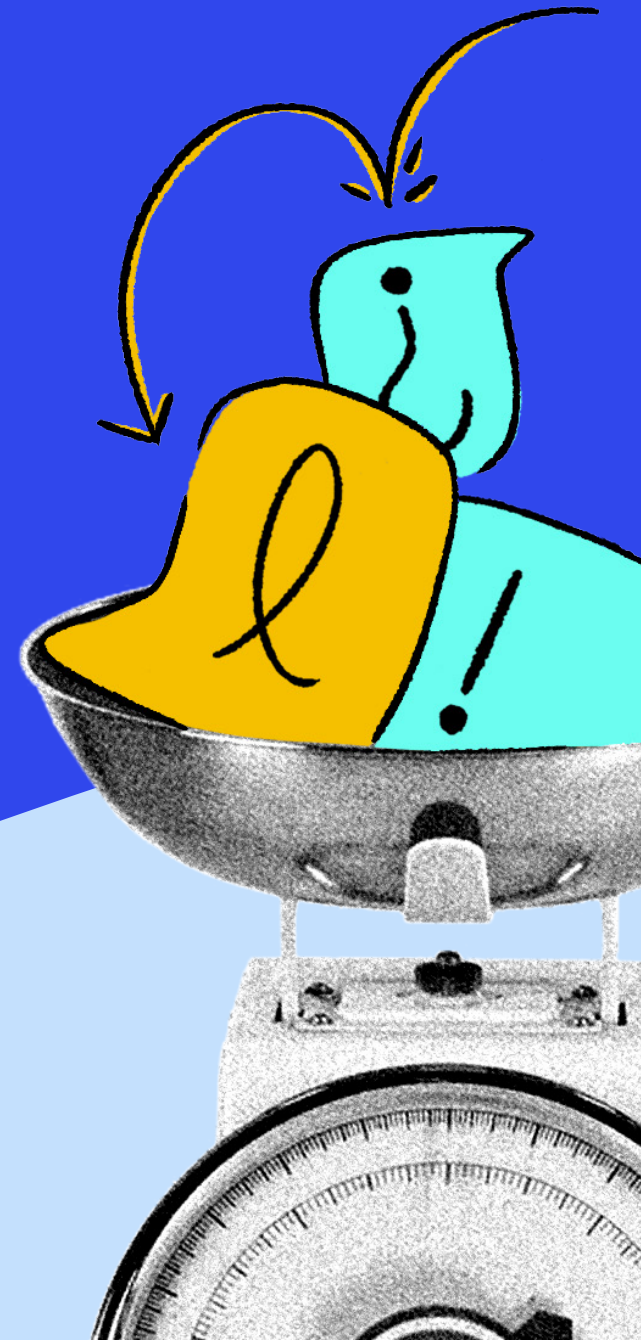
What gets measured gets improved

Peter Drucker said it best: "If you can't measure it, you can't improve it." The same goes for your conversational support strategy. While there are infinite metrics you could track and tweaks you can make, it's important to identify what business outcomes you're trying to solve for, up front. That will help you ensure you're making and measuring the most impactful wins for your team. Here are our tips:

Set meaningful metrics that move the needle

Today, more and more businesses are realizing the true bottom-line value that incredible customer support brings to a business – customer loyalty, retention, and advocacy to name but a few. In fact, customers don't just seek out higher quality service – they're willing to pay more for it.

Now that the perception of support is beginning to shift, the new challenge is creating metrics to match. Rather than solely focusing on costs, it pays to focus on business outcomes that

zapier

"We're currently building datasets that will **show us the success of our customers if they contact support.** Do we retain them? Do they grow their usage? Is that particular part of the product working 30 days after we help them?"

Pam Dodrill,
VP of Customer Support & Success at Zapier

help you move from a "cost center" to a value driver, like customer retention, renewals, and so on. The good news is that the Conversational Support Funnel helps you directly influence these critical business outcomes.

Solve for business outcomes together

Providing a great customer experience and solving critical business outcomes, like customer retention, shouldn't lie solely in the hands of your support team. One of the best ways to ensure you're meeting your goals is to partner with and get buy-in from key teams in your organization, like product, marketing, and sales. Accountability is paramount to success. So, identify what tasks each team will be responsible for and set collective metrics to work towards. Here's an example:

Team	Great partners for	Collective metrics
Support Ops	• Setting up and optimizing your bots and automation for maximum efficiency. • Saving a ton on support costs, while maintaining a high satisfaction rating with your customers.	• ROAR (rate of automated resolution)
Product	• Proactively fixing bugs and product issues that are bothering customers.	• Customer retention
Marketing	• Proactively messaging customers and addressing known pain points before they have questions.	• Product/feature activation • Customer retention
Sales	• Establishing hand-off points for sales conversations, so you can provide a seamless transition for your customers.	• Customer renewals • Customer retention

Pro tip Choose a conversational relationship platform (like Intercom 😉) that allows you to build conversational relationships across the entire customer lifecycle, spanning marketing, sales, and support.

Track efficiency gains

Once you've implemented the funnel you'll want to see how it's improving your team's productivity over time. We recommend setting a benchmark you can track progress towards for key metrics like:

- Rate of new inbound conversations
- ROAR (rate of automated resolution)
- Average first response rate
- SLA performance hit rates

Use customer satisfaction as a leading indicator

Today, the leading metric for support teams is still customer satisfaction. Nearly a quarter (24%) of support leaders say this is the metric they most closely track. Measuring customer satisfaction enables businesses to know just how successfully they're meeting customer expectations. It's also a crucial leading indicator of future churn and customer retention.

Amplitude

"Support is the best product expert within the company and the team that interacts with the most customers. **We have valuable insight into what can be improved**. Use support tickets as data points for these customer experience improvements."

Brian Abad,
Head of Technical Support at Amplitude

Learn, iterate, improve!

Support metrics on their own are just numbers on a dashboard. They only become meaningful when you dig deeper, start looking for underlying trends and themes, and use those insights to take the next step toward providing a world-class customer experience. For example:

- Measure how your bots and proactive messages are performing. Are they engaging customers and resolving issues effectively? If there's an answer or message that's underperforming, try tweaking the copy or filters to improve performance.

- Keep an eye on how your help content is performing. Which articles are closing the most conversations? High-performing articles are worth investing more in, while you should consider gutting or reworking low traffic articles.

- If you're an Intercom customer, you can view Conversation Topics to see the exact topics customers are asking about most. This can help you identify the most helpful articles and bot answers to create next.

Resolution Bot

| All | Live | Draft | Paused | **Underperforming** | in | All languages |

Title	Language	Sent	Resolved ❓	Routed to team
Changing plan	En	2045	100%	0%
Clearing my mentions	En	146	87%	13%
Duplicating messages	En	2045	95%	5%
Conversation tag permissions	En	402	93%	7%
Reset 2FA	En	344	90%	10%
Spam folder	En	236	85%	15%

Checklist for setting your support team up for success from day one

Lay the foundations for world-class conversational support

Once you've created your conversational support strategy, you'll be keen to start putting your ideas into practice so you can start making your support more personal and efficient right away. But where do you begin? With this four-step checklist:

Step 1. Choose the right software

Choosing the right conversational support tool for your business can be overwhelming. With so many tools and shiny new features emerging in the market, decision paralysis can easily kick in. Identifying your team's individual needs up front will help. Ask questions like:

☐ Can the platform do everything you need? In this day and age siloed tools will cost your support team time, so make sure your platform can integrate with your favorite tools and empower your support, marketing, and sales teams to work together seamlessly.

☐ How will the messenger look and feel on your website? Aesthetics and user-friendliness are very important for establishing trust and making it delightful for customers to interact with your support.

☐ Will the platform grow with your business? For example, does it have a growing library of apps and integrations your team can plug into as your business scales?
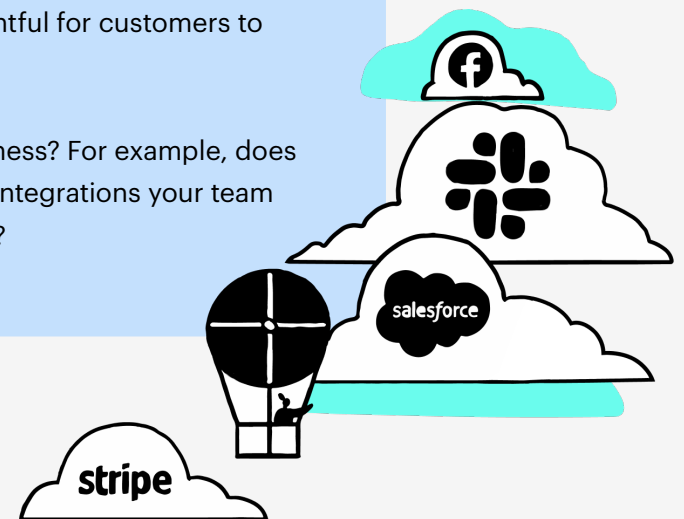
Step 2. Plan your funnel

Next, it's time to plan your Conversational Support Funnel. We created this Coda worksheet to help you plan how you'll address your customers' most common questions through the funnel in the quickest, easiest, and most empathetic way.

☐ <u>Make a copy of the worksheet</u>. Use it as your North Star, but make sure to tweak it based on your customers' needs and the tools you have in your tech stack.

QUESTION	FAQ?	COMPLEX?	PLACE IN FUNNEL	TACTIC	SUCCESS METRICS
How do I configure x product?	Yes	No	PROACTIVE 💪	• Product tour	• Customer retention
How do I use x feature?	Yes	No	PROACTIVE 💪	• Outbound message	• Customer activation • Customer retention
When's my delivery due?	Yes	No	PROACTIVE 💪	• Messenger app (e.g. Shopify)	• Conversation volume
How do I update my billing details?	Yes	No	SELF-SERVE 🤖	• Chatbot answer	• Resolution rate • Customer satisfaction
What's your cancellation policy?	Yes	No	SELF-SERVE 🤖	• Chatbot answer + knowledge base article	• Resolution rate • Customer satisfaction
How can I update my password?	Yes	No	SELF-SERVE 🤖	• Chatbot answer	• Resolution rate • Customer satisfaction
Why am I sending duplicate messages?	No	Yes	SELF-SERVE 🤖 + HUMAN 😀	• Chatbot routing + message from rep	• Response time • Customer satisfaction
Where's my delivery? It's late!	No	Yes	SELF-SERVE 🤖 + HUMAN 😀	• Chatbot routing + message from rep	• Response time • Customer satisfaction
Can you help me choose the right subscription?	No	Yes	SELF-SERVE 🤖 + HUMAN 😀	• Chatbot routing + message from rep	• Response time • Customer satisfaction

Worksheet tips

1. First make a copy of the worksheet. This is just an example of how you can manage your different types of customer questions. Use it as your North Star, but make sure to tweak it based on your customers' needs and the tools you have in your tech stack.

2. Appoint a dedicated tiger team to set up the worksheet and implement your Conversational Support Funnel. Ideally, this will be a group of people on your team who have a strong working knowledge of your customers' needs and an appetite for career growth.

Step 3. Embrace automation

The key to scaling your conversational support strategy without hiring additional staff or taxing your team is to embrace automation. Here are some impactful areas you should automate right away to supercharge your support:

☐ Set up your support workflows to automatically route urgent and VIP messages to the right teams and flag them as priority.

☐ Set up an FAQ bot to almost-instantly answer common customer questions.

☐ Create an onboarding product tour to help new customers learn the ins and outs of getting started with your product or service.

Hi, I don't know how to access my invoice. Can you help?

You can access your invoice anytime through the "My Account" tab in your dashboard. Here's an article with step-by-step instructions on how to get there!

Looking for your invoice?

How to locate your invoice within...

Did that answer your question or were you looking for something else?

That helped 👍

Show me more 👀

Wait for the team 💬

Step 4. Support and train your team

As a support leader, it's unlikely that you'll be doing the day-to-day work of dealing with emotionally-charged complaints and managing complex and commercial conversations. To set your team up for success you'll need to give them the tools, training, and support they require to deliver exceptional customer service and stay satisfied in their roles. For example, you'll want to:

☐ Provide your team with the training and support they need to resolve VIP and complex conversations.

☐ Ask your team what meaningful work they'd like to do with the extra time they'll have. Would they like to manage the proactive side of your support, for example?

☐ And of course, share this guide with your team, so they can start putting some of these ideas into action.

Our learning platform, Intercom Academy has a dedicated conversational support course designed to help your team become conversational support experts with Intercom. You can sign them up here.

Intercom Academy

Become a Conversational Support Expert
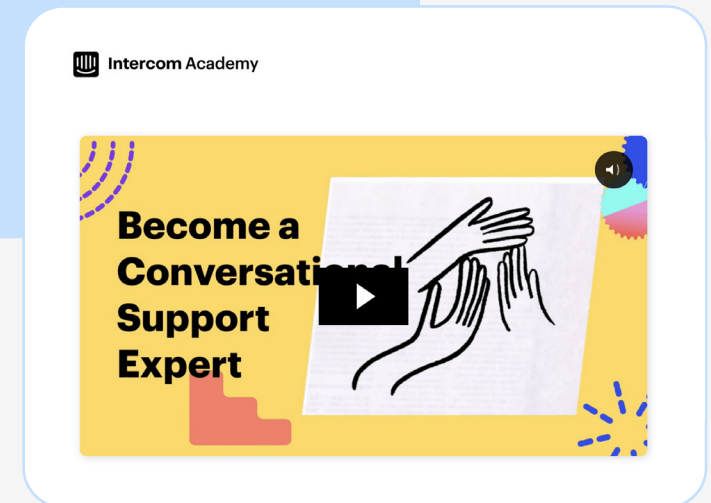
Scale your conversational support with Intercom

At this stage you're probably excited to implement conversational support in your company, so you can start providing customers with the fast, personal support they expect and free your team up to take on even more meaningful work. The great news is you can achieve everything in this guide with Intercom.

Medallia

"Intercom has unleashed the power of conversational support across Medallia's growing suite of products. What used to be a disjointed customer experience is now **unified, consistent, and personalized.**"

Kennen Warmack, VP of Global Customer Support & Operations at Medallia

Interested in trying Intercom to deliver the best support in the business? Go ahead and chat with us through the Intercom Messenger here and we'll provide you with tailored help ASAP.