

AIRCALL'S **2018** CUSTOMER SUPPORT STRATEGY SURVEY



Plans, predictions, insights,
and opinions from
475 customer support leaders



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ABOUT THIS SURVEY

PURPOSE

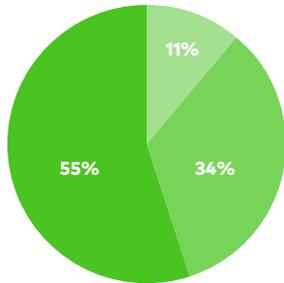
This survey provides a detailed (and timely) answer to a two-part question:

- What are the issues today's customer support leaders care about the most?
- How are they designing their customer support strategies as a result?

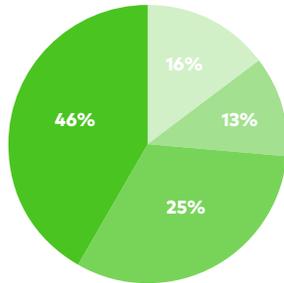
METHODOLOGY

Data in this report comes from a February 2018 survey of 475 U.S. based customer support managers, directors, VPs, and executives. Aircall conducted this online survey with the assistance of a third-party market research firm. Due to rounding, some percentage totals within the report may not equal 100%.

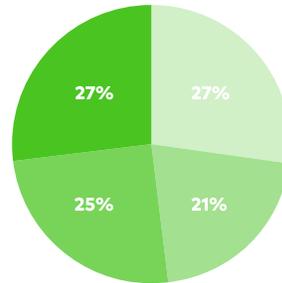
BUSINESS MODEL



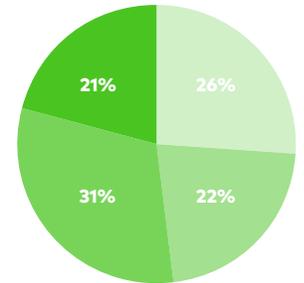
JOB ROLE



COMPANY SIZE



SUPPORT TEAM SIZE



B2C	55%
B2B	34%
Nonprofit	11%

Support Team Manager / Leader	46%
Director	25%
VP	13%
C-level	16%

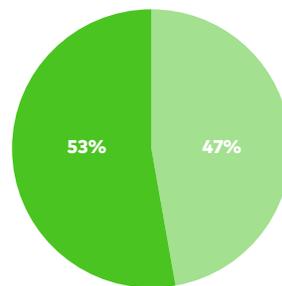
< 50 employees	27%
51-200 employees	25%
201-500 employees	21%
> 500 employees	27%

1-5 employees	21%
6-20 employees	31%
21-50 employees	22%
> 50 employees	26%

STAFFING

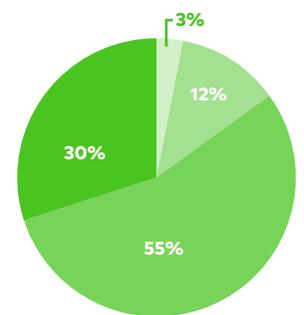


USES CRM OR HELPDESK SOFTWARE



Yes	53%
No	47%

SELF-RATED SUPPORT TEAM PERFORMANCE



Best in the industry	30%
Good, but not yet great	55%
Significant room for improvement	12%
Just figuring out the fundamentals	3%



TEAM LEADERS

Respondents with the job role of Support Team Manager/Leader.

DIRECTORS & ABOVE

Respondents with the job role of Director, VP, or C-level.

SMALL TEAMS

Customer support teams with 5 or fewer employees.

MIDSIZE TEAMS

Customer support teams with 6–50 employees.

LARGE TEAMS

Customer support teams with more than 50 employees.

CRM/HELPDESK USERS

Respondents who use a CRM or Helpdesk software solution (ex. Salesforce, Zendesk, Intercom) to manage support team operations.

NON-USERS

Respondents who do not use a CRM or Helpdesk software solution to manage support team operations.

THE BEST

Respondents who rated their customer support team's overall performance as "best in the industry."

THE REST

Respondents who rated their customer support team's overall performance as "good, but not yet great," "significant room for improvement," or "just figuring out the fundamentals."

QUALITATIVE QUOTES

Our final survey question asked respondents to consider the following:

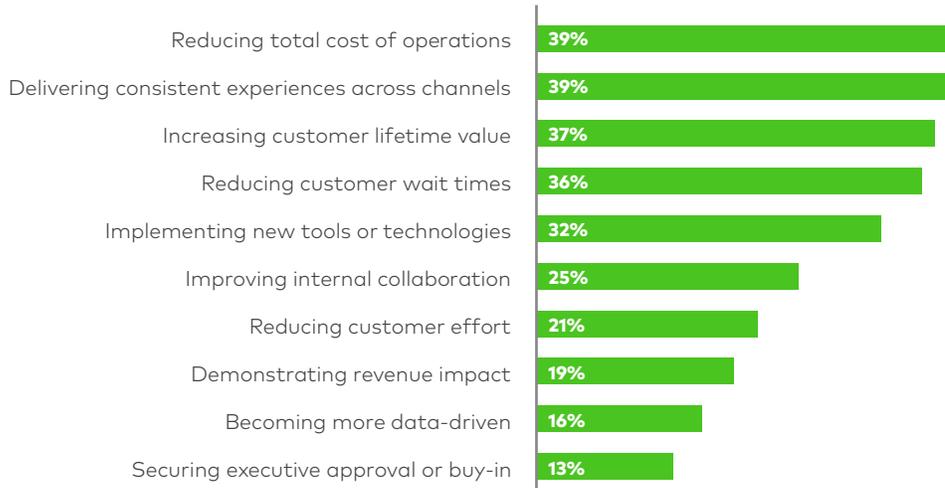
"What one change do you believe would have the most positive impact on your organization's customer support operations in 2018?"

Select responses are quoted and in green sidebars throughout this report.





Which three customer support objectives represent your top priorities for 2018?



Setting customer support strategy is an exercise in prioritization. There are many valid objectives a team can pursue, but there is a finite amount of time, money, and attention available for allocation. Given the chance to choose three options, survey respondents collectively confirmed that their **top targets for 2018** will be:

1. Reducing total cost of operations
2. Delivering consistent experiences across channels
3. Increasing customer lifetime value

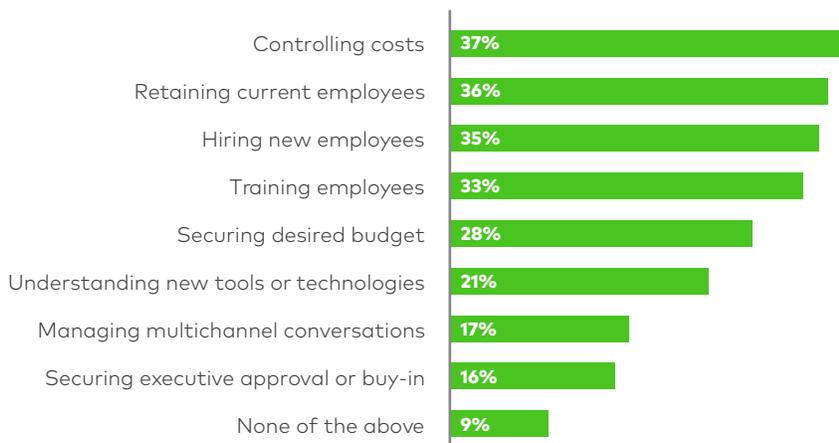
In fact, only two survey subgroups offered a different list. **Team Leaders** downgraded each of the overall Top-3 by one position and identified reducing customer wait times as their #1 priority. Meanwhile, **The Best** ranked implementing new tools or technologies above all else, followed by reducing customer wait times and increasing customer lifetime value.

The most confident and consistent subgroup, however, was **Large Teams**. More than half of respondents from this segment listed delivering consistent experiences across channels as their #1 priority — making it the only example of a >50% consensus answer to this question.

Moving forward, these key themes of cost control, customer experience, and technical innovation will continue to play leading roles throughout this report.



Which of the following obstacles do you see as potential threats to the success of your customer support strategy in 2018?



Plotting a path to success wouldn't be complete without acknowledging a few of the obstacles you could encounter along the way. Overall, survey respondents reported that they are most concerned about the potential threats posed by challenges:

1. Controlling costs
2. Retaining employees
3. Hiring employees

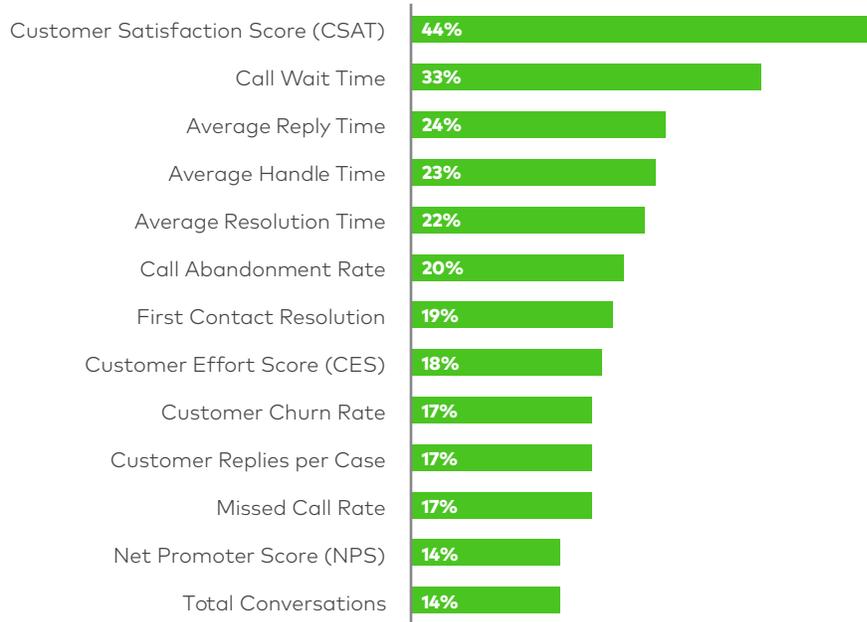
With training employees just missing out on a Top-3 spot, it's safe to say that budget and talent management are the two primary worries weighing on the minds of customer support leaders in 2018.

This notion was further underscored by the lack of variation between survey subgroups. **Team Leaders** and **Large Teams** were only slightly more concerned about retaining employees than the average respondent, and **Small Teams** were (predictably) the segment most focused on controlling costs.

Combining these two themes together, one could say that today's customer support leaders have a mandate to find cost-effective ways of attracting candidates, maximizing talent, and improving morale.



Which of the following customer support metrics does your organization consistently track?



In addition to confirming their broader priorities, we also wanted to know which **specific metrics** customer support leaders use to monitor progress. Overall, the two most important indicators appear to be Customer Satisfaction Score (CSAT) and Call Wait Time. Or, put another way, how long does it take to connect with agents and how satisfying are those interactions?

The next-most popular tier of metrics — average reply time, average handle time, and average resolution time — also focus on operational urgency and efficiency. Meanwhile, more commercial metrics like Customer Churn Rate and Net Promoter Score (NPS) seem to be lesser priorities at the moment.

The fact that only two metrics are consistently tracked by more than 25% of customer support leaders suggests analytics is an area in need of improvement. However, the survey data does imply that reporting matures as teams scale.

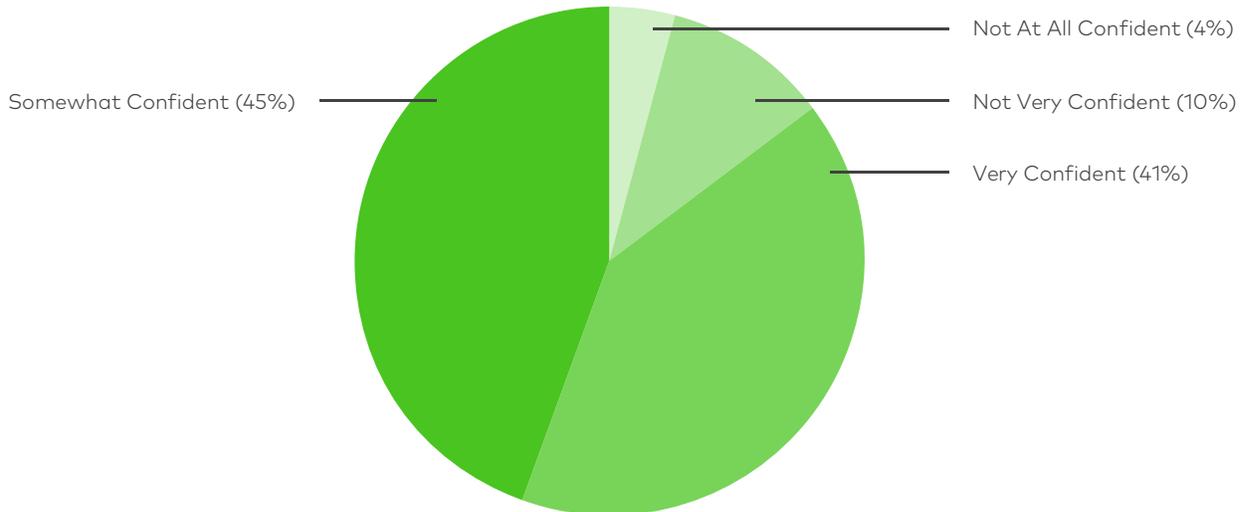
While **Small Teams** measure only one metric with a >25% consensus, that figure jumps to three metrics for **Midsize Teams** and six metrics for **Large Teams**

"Efficiency in all areas."

- Respondent #84



How confident are you in your organization's ability to accurately measure customer support metrics?



The number of **metrics** you measure means little if your team can't trust their **accuracy**. The good news is 85% of survey respondents are somewhat confident or very confident in the legitimacy of their measurements. There are, however, a few subgroup variations worth noting.

Team Leaders, for example, are 10% less likely to classify themselves as very confident than **Directors & Above**. This finding suggests the feedback loop between those in the corner offices and those on the front lines might need a bit more maintenance. But it's actually another two segments who really stand out for their unparalleled confidence.

CRM/Helpdesk Users are 92% confident (52% very) in their metrics accuracy — 14% more than **Non-Users**. Meanwhile **The Best** are 96% confident (70% very) — 15% more than **The Rest**.

It's important to note that 71% of **The Best** are also **CRM/Helpdesk Users**, as we'll be revisiting the relationship between these two groups several times throughout the report. And you may already be wondering what comes first: Does CRM/Helpdesk software lead teams to become "the best", or is the technology naturally preferred by teams who have already achieved that status?

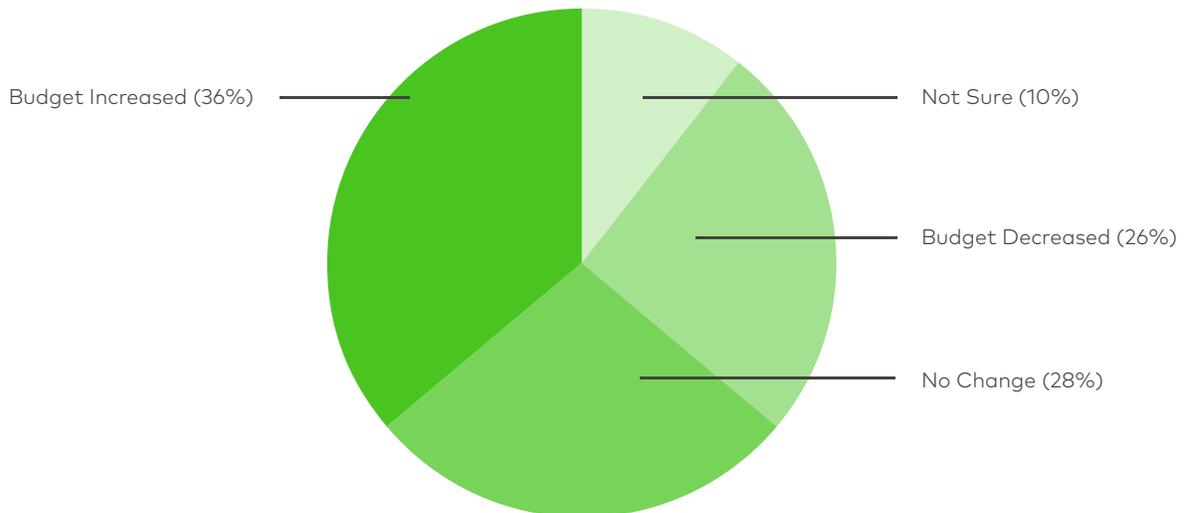
While we can't determine causation, there are two distinct correlations we can draw from this specific survey question. The analytical capabilities embedded in modern CRM/Helpdesk software gives customer support teams greater confidence in the accuracy of their metrics. Additionally, that confidence is a consistent trait among the best teams.

"Improved data analytics."

- Respondent #153



How did your total annual customer support budget change from 2017 to 2018?



Now that we know more about where customer support teams are aiming and what they'll be measuring, it's time to examine the **financial resources** they'll use to fuel their journeys.

Just 36% of survey respondents expect a budget increase in 2018. The remaining 64% will have to plan more conservatively — with a quarter of all teams reporting a budget decrease.

The Best will be the most active investors of any subgroup, with 56% of their teams welcoming a budget increase. And **B2C** customer support leaders will also be the beneficiaries of comparatively bigger balances. While only 22% of **Nonprofit** respondents and 33% of **B2B** respondents expect a budget increase this year, 45% of their **B2C** counterparts say the same.

To a lesser extent, financial support also proved to be a product of team size. Thirty-eight percent of **Large Teams** are forecasting an annual budget increase while 37% of **Midsize Teams** and 32% of **Small Teams** responded similarly.

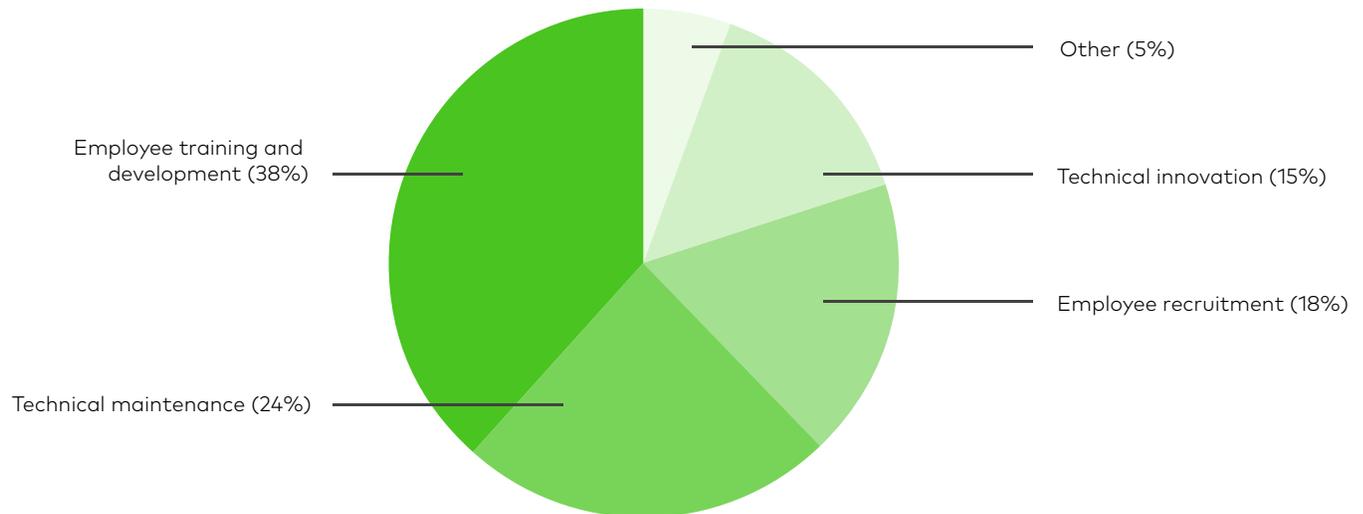
One thing nearly all customer support teams are increasing, of course, is their ambition. So as a result, 2018 may be another year of "doing more with less" for many.

"More money."

- Respondents #52, #96, #281



Which of your customer support budget categories will receive the most funding in 2018?



How you choose to allocate your budget reveals a lot about what you value. This year, the emphasis seems to be on staffing.

Employee training and development was the best-funded **budget category** by far. And when combined with the category of employee recruitment, we see that 57% of survey respondents are making "people costs" their top budget priority. This trend held constant across all subgroups as well, with the only significant difference being an increased interest (12% above average) in employee recruitment among **The Best**.

It's important to remember, though, that the division between people and technology is not binary in practice. Training employees on how to use a new live chat tool, for example, blurs the line between the two categories. Similarly, investing in state-of-the-art software can be a significant asset when it comes to attracting and retaining talented employees.

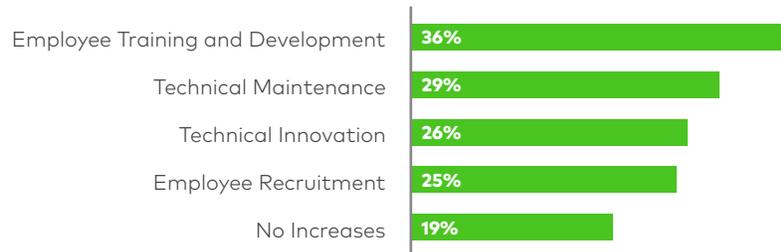
And as we'll see shortly, claiming that customer support teams are not investing in technology would be an incorrect conclusion.

"Invest in employees first."

- Respondent #177



Which of your customer support budget categories will receive more funding in 2018 than they did in 2017?



A growing budget could conceal a company's mandate to consolidate software systems. Conversely, a shrinking budget might mask a team doubling its investment in talent acquisition. As a result, we wanted to investigate **budget categories** from one additional angle.

Employee training and development was confirmed as the budget category customer support leaders are most likely to increase spending on in 2018. And when combined with employee recruitment, we see that 61% of survey respondents will spend more on "people costs" this year.

Technical maintenance and technical innovation, on the other hand, will attract increased investment from 29% and 26% of survey respondents, respectively. That means 55% of customer support leaders will spend more on "tech costs" in 2018 than they did last year.

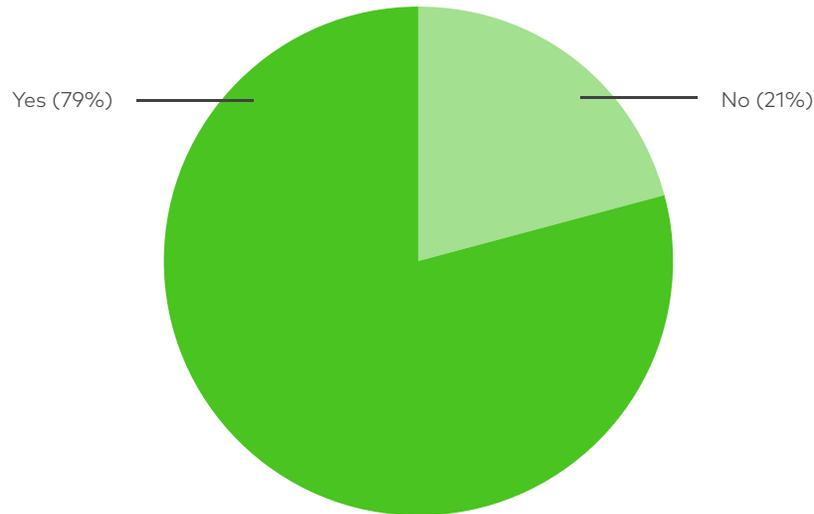
So even if only 36% of respondents have the benefit of a bigger total budget, 81% are planning to increase investment in at least one budget category.

"Better technology to get us moving forward."

- Respondent #344



Do customer support reps receiving formal training when initially joining your organization?



Even the most capable customer support representatives will need a bit of assistance before they can succeed in a new work environment. Thankfully, four out of five survey respondents said they welcome new hires with a formal training agenda.

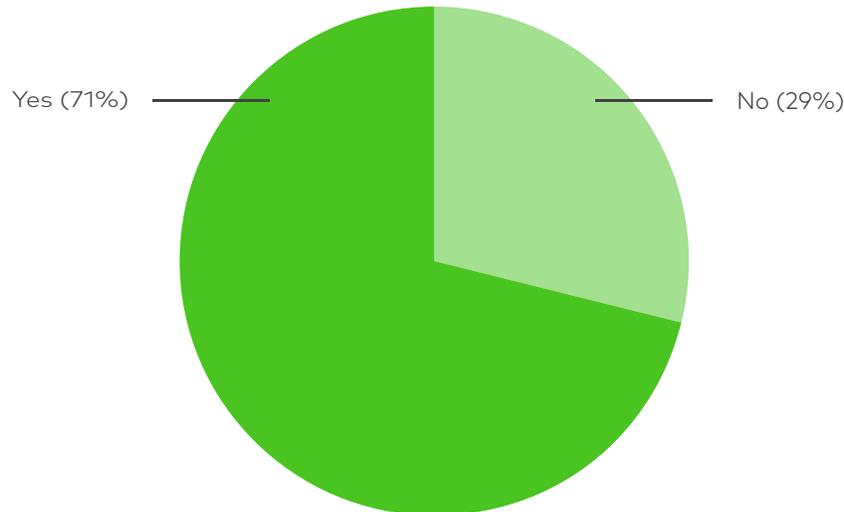
CRM/Helpdesk Users appear the biggest advocates of **onboarding**. While only 64% on **Non-Users** provide initial training, 92% **CRM/Helpdesk Users** formalize their early employee education. This may, however, be a result of the more complex technical workflows they need to teach.

The Best also confirmed their intentions to invest in employee development, with 90% saying their new reps receive formal training. Only 74% of **The Rest** responded similarly.

Finally, commitment to employee onboarding also correlates strongly with team size. **Small Teams**, **Midsize Teams**, and **Large Teams** provide initial training at rates of 68%, 80%, and 86%, respectively. But in defense of smaller teams, they tend to have fewer complex systems or established protocols to pass onto new hires. Also, many under-resourced squads are still operating in survival mode.



Do those customer support reps receive any formal training beyond initial onboarding?



Everything an effective customer support representative needs to know can't be neatly compressed into one two-day workshop. Employee development has to be a **continuous** process.

Seven out of 10 survey respondents have aligned their strategies with this sentiment, offering formal **training** that lasts beyond initial onboarding. And despite the 8% drop off from the previous question, it still represents a solid majority.

The Best and **CRM/Helpdesk Users** led the way once again, providing continuous training at rates of 88% and 85%, respectively. And team size continues to be an important indicator. While 76% of **Large Teams** offered ongoing education, that figure slipped to 74% for **Midsize Teams** and 58% for **Small Teams**.

The more surprising set of findings was associated with business models. Sixty-four percent of **Nonprofit** organizations and 69% of **B2C** businesses formalize training beyond onboarding — slightly less than the average respondent. **B2B** companies, on the other hand, are ahead of the curve at 76%.

"Have training around once a month with new goals each time."

- Respondent #326



Which type of training do you believe is most effective for customer support reps?



Few would argue that onboarding is good and ongoing training is better. But what's the **most effective vehicle** for delivering employee education? The consensus isn't so clear.

Live workshops, whether presented by industry experts or internal staff, are the preferred choice for 50% of customer support leaders. And considering the emotional and nuanced nature of the profession, it makes sense that traditional in-person instruction is still in fashion.

B2C businesses, **CRM/Helpdesk Users**, **Large Teams**, and **Directors & Above** are the subgroups most partial to live workshops from industry experts. **The Best** took their interest in outside advice a step further, ranking both live and online expert workshops above all in-house alternatives.

Nonprofit organizations, **Small Teams**, and **Team Leaders**, on the other hand, are most enthusiastic about the advantages of employees shadowing more experienced team members. These preferences may be a product of limited budgets, but the personalized attention and team collaboration made possible by paired learning certainly has its benefits.

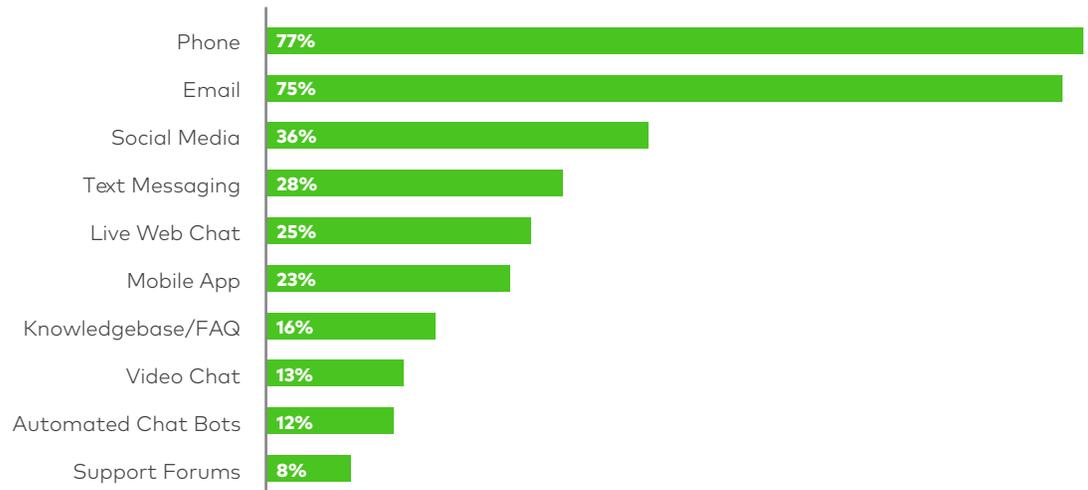
Specific tactics aside, the existence and persistence of formal training plans will continue to be critical success factors. With 72% of customer support leaders employing remote, outsourced, and/or seasonal agents, today's increasingly diverse teams need consistent and coherent guidance now more than ever.

"Experts brought in from OUTSIDE our organization to advise."

- Respondent #99



Which of the following customer support channels does your organization currently offer?



Digital innovation has significantly expanded the potential avenues for customer communication in recent years, but we wanted to know which **channels** companies are actually adopting.

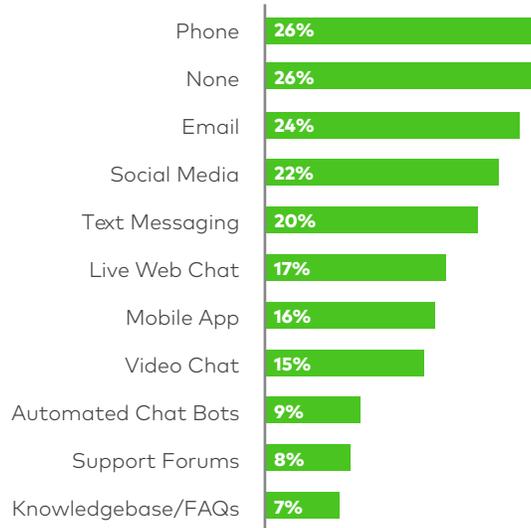
Phone and email remain primary pillars of customer conversation for most teams. They were the only two channels offered by more than 40% of survey respondents. Social media, live web chat, and text messaging are firmly in the next-most popular tier of technologies while mobile apps, automated chatbots, and even some self-service channels are still in the early days of their adoption curves.

Not surprisingly, team size and technical sophistication were the strongest predictors of channel variety. While **Small Teams** only reported >10% adoption for four channels, **Midsize Teams** and **Large Teams** had >10% adoption on nine and 10 channels, respectively. **CRM/Helpdesk Users** and **The Best** seem to have similarly diverse channel mixes. Both of those segments listed 10 channels above 10% adoption and six channels above 25% adoption.

These findings suggest companies naturally add more support channels as they grow, and that those using CRM/Helpdesk software likely have greater confidence in their ability to manage multichannel communications. Because, as our earlier findings on respondent priorities imply, most customer support leaders would not be interested in increasing channel quantity if it came at the expense of customer experience quality.



Which of the following customer support channels does your organization plan to offer for the first time in 2018?



Now that we have a snapshot of what teams are offering today, the next logical step is to see what they have planned for tomorrow. And for three-quarters of survey respondents, the answer is adding (at least) one **new support channel** before the end of 2018.

Not all subgroups were equally ambitious, however. **CRM/Helpdesk Users** (87%) were the strongest advocates for channel expansion, followed closely by **The Best**. But the most interesting discrepancies centered on team size and job role.

The fact the only 61% of **Small Teams** plan to add channels is almost certainly a side-effect of their limited resources. However, the revelation that 84% of Medium Teams and 68% of **Large Teams** responded similarly suggests there is a plateau point at which growing teams suddenly become content with their offerings.

The other notable variation was between **Team Leaders** (64%) and **Directors & Above** (83%). This gap could signal competing priorities or ineffective communication between colleagues.

There's also the matter of which channel(s) to choose when expanding your mix. And perhaps the most surprising finding of all was that one in four respondents plan to add the phone for the first time in 2018. But then again, maybe more of today's web-first businesses are launching their support operations from a base of email and live web chat.

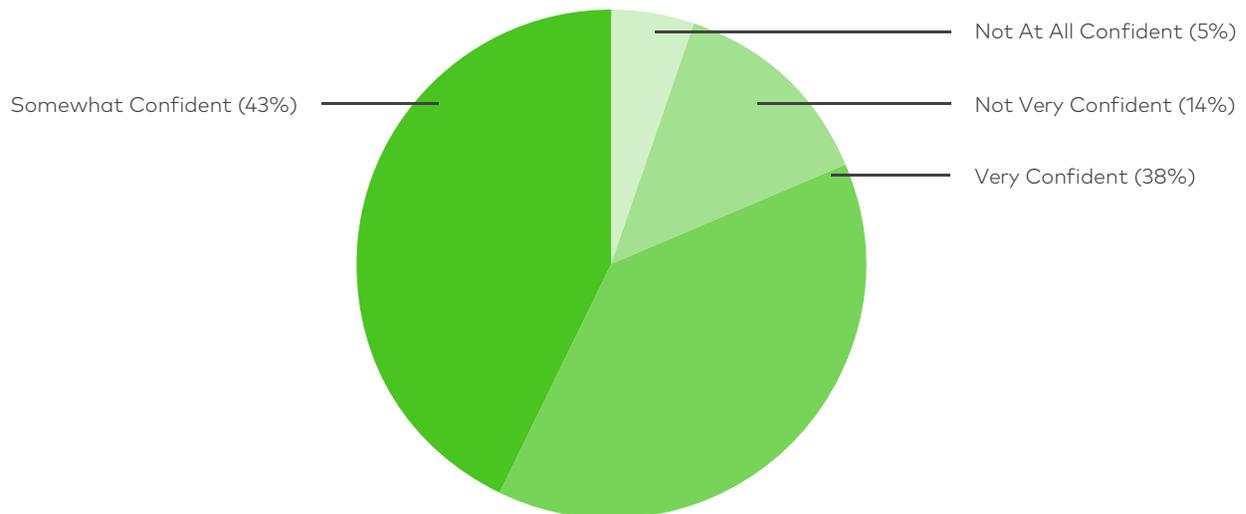
"The ability to reach out to customers in more technically advanced and convenient ways."

- Respondent #99





How confident are you in your organization's ability to accurately track customer conversations across multiple support channels?



One of the most difficult questions today's customer support leaders wrestle with is how to strike the balance between convenience and quality. They want to make their teams as accessible to customers as possible, but they can't afford to let their service standards slip along the way.

Channel offerings are a prime example of this dilemma. Customers want the flexibility to interact with a company through multiple channels. But unless that company can tie all those separate threads into one cohesive conversation, the customer will inevitably find themselves repeating and correcting key details.

The first step any support team can take toward improving their customer experience is establishing visibility. At the moment, more than 80% of survey respondents say they are confident in their organization's ability to **track conversations** across multiple channels. Only 39% claim to be very confident, however.

The Best and **CRM/Helpdesk Users** report 94% and 92% confidence, respectively. And their leadership here serves as a strong endorsement of the value of software as a centralizing force. But findings related to team size suggest that the solution may not be as simple as purchasing new technology.

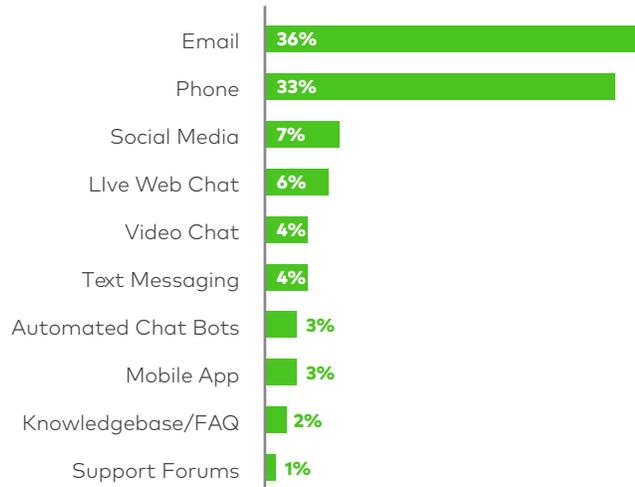
Large Teams were actually less confident than **Midsize Teams** when it comes to tracking multichannel conversation (81% vs. 86%). One potential explanation could be that channel strategies grow more complex and confusing at scale. Whatever the rationale, though, the data reinforces the notion that no priority is more important to **Large Teams** than their ability to deliver a consistent customer experience.

"More direct access to customers' concerns from in-field employees."

- Respondent #206



For general inquiries, which support channel would be your customers' top preference?



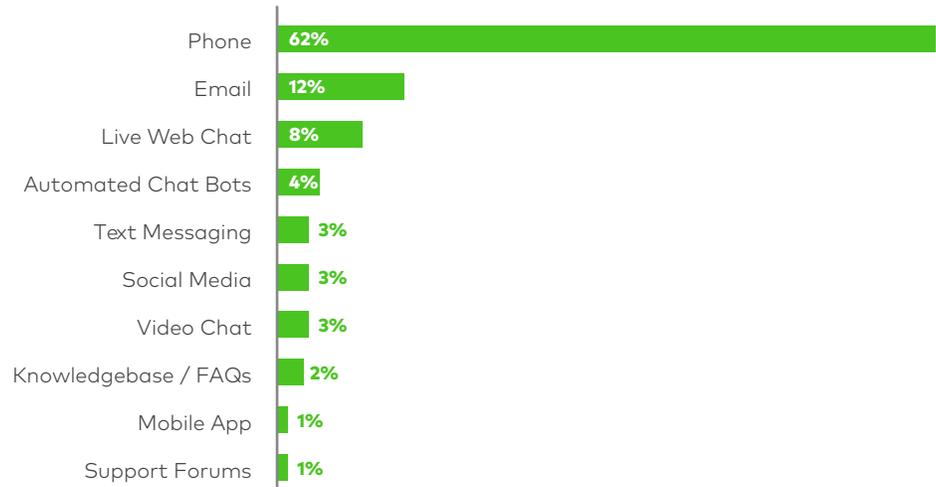
Modern companies ultimately offer multiple support channels options because they know customers' communication preferences are context-dependent. What feels logical in one scenario might feel inconvenient in another. As a baseline for comparison, though, we initially wanted to examine the channel preferences associated with **general inquiries**.

A little more than two-thirds of respondents believe their customers would prefer email or phone in a standard support scenario. **B2C** companies, **Nonprofit** organizations, **Team Leaders**, **Small Teams**, and **Large Teams** are each slightly stronger advocates for the phone, and all remaining survey subgroups ranked email #1.

This relative consensus reinforces that conclusion that phone and email are still the two dominant support channels — one for instant communication and the other for intermittent.



For urgent inquiries, which support channel would be your customers' top preference?



General inquiries are worth exploring in theory, but they rarely appear in practice. Almost every support conversation comes with the implication (or literal confirmation) that the customer believes their inquiry is **urgent**. As a result, this is the most important context for teams to consider.

Nearly two-thirds of support leaders agree that phone is the channel of choice when customers want speedy resolutions. This ranking held constant across all subgroups, with **Team Leaders** (73%) and **B2C** companies (68%) offering the most consistent support.

These findings are not especially surprising considering the immediacy and personal accountability that voice conversations are uniquely positioned to provide. In fact, many times customers turn to the phone as a means of escalating issues that could not be solved in a separate channel.

The data is, however, a valuable reminder that customer support leaders need to configure their phone systems and strategies in a way that consistently delivers the rapid responses customers crave.

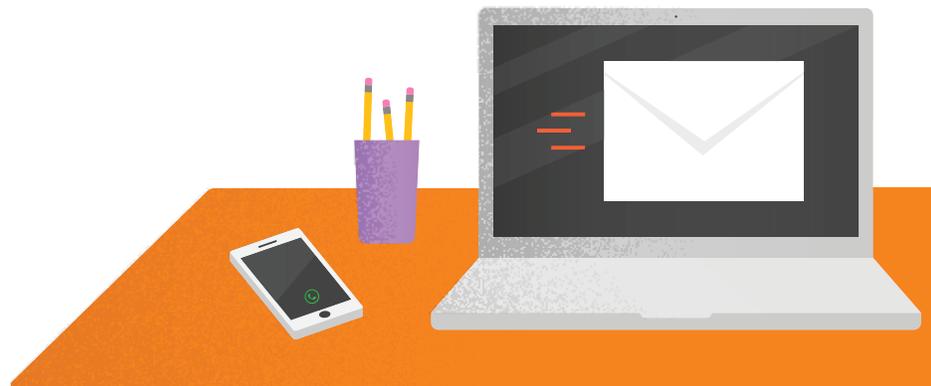
PEOPLE ARE STILL YOUR COMPETITIVE ADVANTAGE. The robotic revolution is still (at least) a few years away for most customer support teams. High-touch, human channels like phone, email, and social media remain the primary stages where satisfaction is won or lost. We're already seeing best-in-class companies double down on employee recruitment and continuous development. And as unconventional staffing strategies grow in popularity (and necessity), coherent training strategies and effective collaboration tools will only become more important.

ONE CUSTOMER CONVERSATION, CONTINUED OVER MULTIPLE SUPPORT CHANNELS. Three-quarters of customer support leaders plan to add a new channel to their strategies this year. Customers will certainly appreciate this flexibility, but they will not accept operational growing pains as an excuse for frustrating experiences. As a result, managers must find solutions for centralizing customer intelligence and providing agents with easy access to conversational context.

IT'S TIME TO CHANGE THE CONVERSATION AROUND CUSTOMER SUPPORT. The perception inside most companies is that customer support is inevitably a cost center. This stubborn attitude has no doubt forced many managers to prioritize efficiency above all else. But with ample evidence emerging to suggest customer experience is now the most influential business metric, customer support leaders have a critical opportunity to reposition their profession in the eyes of their colleagues.

So as you consider the specific details uncovered by this survey, stay cognizant of the broader conversation identified by Respondent #438:

"I believe customer support is a value center rather than a cost center, but at the moment, we're not especially valued in general...
A paradigm shift would be the best possible thing."



Aircall helps support teams have the kind of conversations that create lifelong customers. Our call center software easily integrates with your CRM, Helpdesk, and other critical business tools, giving agents all the context they need to deliver superior service.

For more insights into the issues customer support leaders care about the most, visit aircall.io/blog.

