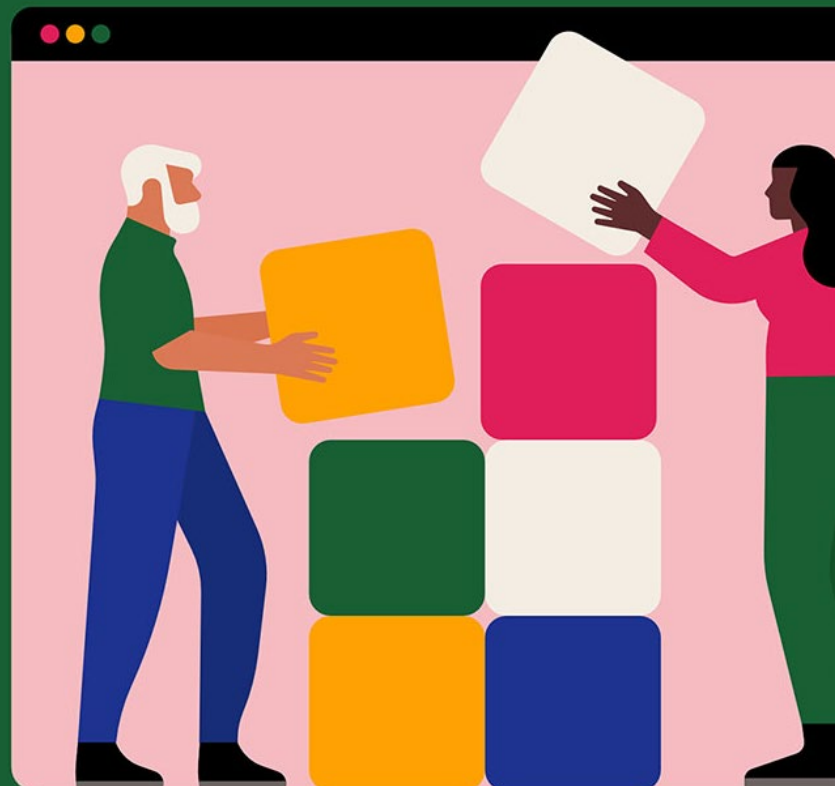# The Slack handbook for exceptional customer service

A handy guide to resolving issues faster and transforming the customer experience with Slack as your intelligent productivity platform

slack

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Introduction

Unwavering customer loyalty is one of the hardest, yet most rewarding things for a business to earn. So much depends on creating a delightful experience throughout the customer journey—especially when something has gone wrong and your customer needs immediate help.

Thankfully, the tools available to modern service teams have changed the game. If your team can provide skilled, personalized and immediate support, you stand a far greater chance of giving customers a pleasant experience (even when things go wrong) and earning their repeat business.

To resolve issues faster and provide a better customer experience, companies today are **transforming customer service with Slack as their intelligent productivity platform.** They're closing out tickets in less time, improving Net Promoter Scores and streamlining their workflows with automation and AI. You can too. In this playbook, we'll show you how.
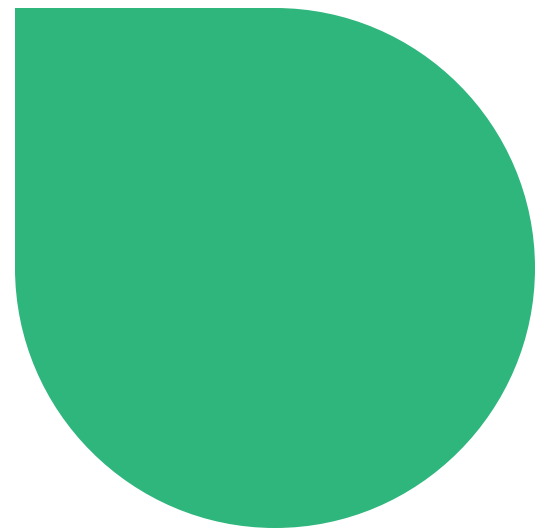
Customer service has gone virtual

Technology has radically changed the way we talk to customers and understand their needs. In recent years, thanks to social media, high-speed internet and app-packed smartphones, customers had more ways than ever to interact with support teams, and vice versa. Then came Covid-19. Physical call centers shuttered almost overnight, and customers suddenly had a slew of new issues to grapple with.

As service teams shifted to remote work, they adopted new tools and tactics to stay productive:

65%
of high-performing service organizations use automation

88%
is the amount service teams' usage of AI has increased since 2020 (from 24% to 45%)

Source: Salesforce State of Service Report, Fifth Edition

Meanwhile, customers want help faster, and they want it digitally:

77%
of customers expect to interact with someone immediately when they contact a company

74%
of customers expect to be able to do anything online that they can do in-person or by phone

Source: Salesforce State of the Connected Customer, Sixth Edition

Whether it's because of the natural evolution of online commerce or the sudden and widespread shift to remote work, one thing is clear: the ways in which service teams work, and the expectations customers have of them, have fundamentally changed.

Teams need a platform for their service operations

To better support service agents no matter where or when they work, and to provide customers with relevant, timely answers, companies must embrace new solutions. They need to bring their teams, tools, partners and customers together on a single **productivity platform**.

With a platform for their service operations, teams can:

- **Speed up time to resolution** by centralizing communication, collaborating in real time and integrating tools and workflows
- **Break down silos** by letting agents easily swarm cases with experts across the company, and allowing agents to share customer feedback for direct action
- **Embrace flexibility** by empowering service agents to succeed from anywhere
- **Automate the work** of customer service, saving agents time on low-value tasks so they can focus on supporting customers

A better experience for agents

Connecting your entire organization on a single platform can foster a strong, unified platform regardless of who's working where.

"Organizations that have provided their reps with additional schedule flexibility see greater employee well-being benefits with minimal to no disruption to their operational efficiency."

Source: "**Predicts 2022: Customer Service and Support — Paving the Way for Greater Ambition and Responsibility for the Customer Experience, 2021**," Gartner®, 2021. GARTNER is a registered trademark and service mark of Gartner, Inc. and/ or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

A better experience for customers

By embracing new technology to power customer service, companies can also have a direct, positive impact on the customer experience.

15-20%
boost in customer satisfaction when companies use technology to revamp the customer experience

Source: McKinsey

Learn more about the benefits of a **productivity platform for service teams**.

Slack is your customer service platform

Since launching in 2014, Slack has served as a trusted collaboration hub that brings people, information and tools together. The Slack platform features over **2,600 apps** and **a robust API** to help you streamline your service work, automate mundane tasks and bring context into your conversations with customers.

The Slack difference for service teams

Unlike some other solutions, Slack offers a variety of powerful features to help streamline and amplify the work of customer service:

- Cross-team **channels** for quickly sharing case information and triaging issues together
- Organization-wide, AI-powered **search** to help agents quickly find the right expertise, even if it's outside their department
- One-click **reacji** (aka emoji reactions) and low-code **workflows** for easily intaking, escalating and resolving customer issues
- Out-of-the-box **integrations** with powerful tools like **Salesforce Service Cloud** and **Jira**
- Secure external collaboration via **Slack Connect** to bring customers and partners into the conversation

A platform service teams love

Perhaps most importantly, Slack is a tool that service agents eagerly adopt. A recent **Forrester Consulting Total Economic Impact study**[1] found that Slack boosted employee satisfaction within service teams. In particular, Slack was cited for:

- Improving information flow between team members
- Facilitating coaching opportunities and enabling more timely, direct feedback
- Reducing the onboarding time for new hires
- Helping to maintain company culture in a work-from-home era

"From a communication standpoint, Slack is the lifeblood of our team. We use Slack channels as a collective knowledge base to source answers and communicate with supervisors, which ultimately helps us successfully deliver on our KPIs."

Brian Malone
Director of Customer Service, **Shipt**

[1] Source: "**The Total Economic Impact™ of Slack for Service Teams**," a commissioned study conducted by Forrester Consulting on behalf of Slack, April 2021
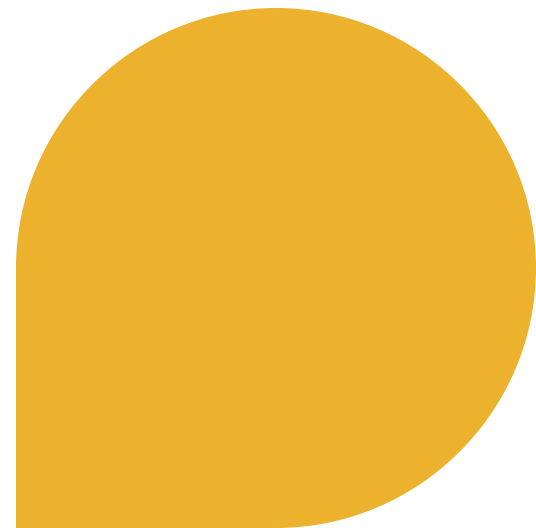
Resolve customer issues faster with Slack

Let's dive deeper. Slack boasts a variety of features and integrations that service teams can use to streamline and amplify the work of customer support.

Revolutionize your customer's experience

As service teams lean on self-service and automation, the cases that do make their way to an agent are not easy fixes. Because agents are working on more complex issues, they are increasingly leaning on subject-matter experts to resolve cases. But the tiered support model can be frustrating; given that **83% of customers expect to solve complex problems by talking to just one person**, it's understandable that these handoffs lead to lower customer satisfaction scores.

Slack creates a tierless approach by **integrating** with **Salesforce Service Cloud** for seamless case management. This empowers agents to easily pull ticket information into Slack and update cases directly from within Slack channels.

Going tierless creates a better customer experience because it leads to less friction and faster resolution times from one point of contact. But it's also highly beneficial for service teams because it streamlines the agent experience and enables collaboration at scale with the right experts on demand.

The result? Every customer gets a truly white-glove experience. Learn more about **Slack for service teams**.

You can also connect Slack with popular ticketing solutions like **Jira**, **Intercom**, **Freshdesk**, **Zoho Desk** and **Halp**. That's what healthcare patient platform **83bar** did, linking its service team's Slack workspace with Halp, its help desk solution. In doing so, the company was able to reduce the average time for responding to tickets from as much as a day and a half to just one hour.

Finally, integrations like these go both ways; yes, they let teams easily surface incident information within Slack, but they also give agents the ability to update colleagues and customers with additional context and details, all without leaving Slack.

"In Slack, we can troubleshoot and identify the information needed to answer a question, and this enables us to be more succinct and efficient. Slack allows us to solve issues in almost real time."

Sebastian Burzacchi
Vice President of Service Operations, **Oscar Health**

Discover more service solutions that integrate with Slack in the **Slack App Directory**.

Swarm cases as a team

Collaborative platforms like Slack allow teams to quickly share information and solve problems together. For service teams, that means a single agent can drive the entire process; instead of escalating cases to other experts when they reach an impasse, service agents can own cases from start to finish.

When a complex issue arises, agents can begin a swarm workflow right from Slack, automatically connecting agents with the right cross-functional experts based on required skills, availability and capacity. **Swarming** can eliminate the lag time that comes with moving tickets through a tiered system, and ultimately speed up case resolution because it automatically brings the right experts together to solve complex issues directly in Slack.

The service experts at Salesforce recently unlocked benefits like these by testing a **Slack-powered swarming pilot program** for some of their support teams. The results were so impressive that Salesforce now plans to roll out the model across its entire global support organization.

Impact of switching to a Slack-powered swarming model at Salesforce:

26%
improvement in days-to-close rates

19%
increase in same-day case resolutions

Beyond the impact on those key metrics, swarming can have real benefits for the customer experience. Instead of being passed from one agent to another, their issues get handled by a single point of contact, giving them a consistent partner to rely on throughout the process.

And those benefits are measurable too.

36%
faster case resolution at **Intuit Quickbooks** from using Slack to support its service operation

12%
higher NPS® score at Intuit Quickbooks after its service teams adopted Slack

**Learn more** about how Slack can power a collaborative approach to customer service.

Triage issues faster with channels and search

For service teams, keeping track of cases and quickly surfacing answers for customers are crucial responsibilities. Slack makes both of these tasks easier.

Many service teams opt to create dedicated Slack **channels** for individual cases or customers, keeping issues organized and easily discoverable.

Meanwhile, Slack's AI-powered, organization-wide search lets agents quickly find information and experts across the entire company, so they can answer customer questions faster and loop in other stakeholders when they need more input.
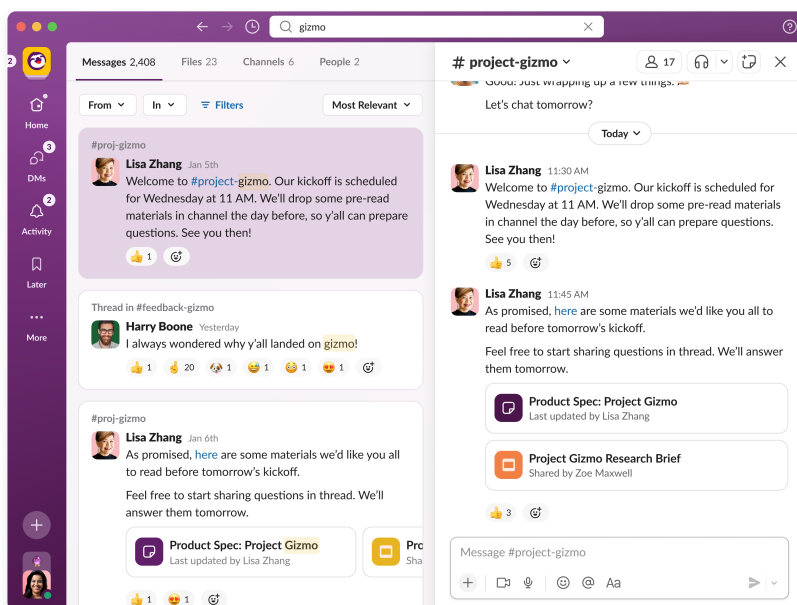
Features like these have helped streamline customer service at accounting software company Xero. While agents on Xero's CX (customer experience) team used to communicate primarily by email, they now share ideas and information in 30 to 40 Slack channels dedicated to specific areas of expertise. They also use @mentions, reacji and comment threads to quickly claim or assign cases, and track their progress toward resolution.

"[Once a case is claimed], agents can move on to the next customer. That means our customers are actually getting quicker answers. That's huge."

Matt Simpson
Lead Workflow Coordinator, Customer Experience, Xero

Speed up communication

Seventy-six percent of support teams are staffed by remote workers today, and that number is expected to increase. With so many agents working from different locations and across time zones, good communication is essential. Fortunately, Slack is packed with features to support the sharing of ideas and information.

For example, Slack **huddles** are a great way for agents to quickly triage issues with teammates. Using these ad hoc audio conversations, agents can easily tap the expertise of their coworkers and deliver fast answers to customers. They can even share their screens in huddles to review documents or websites together as needed. And huddles are automatically transcribed, so the information exchanged is captured in the company's knowledge base for others to reference.
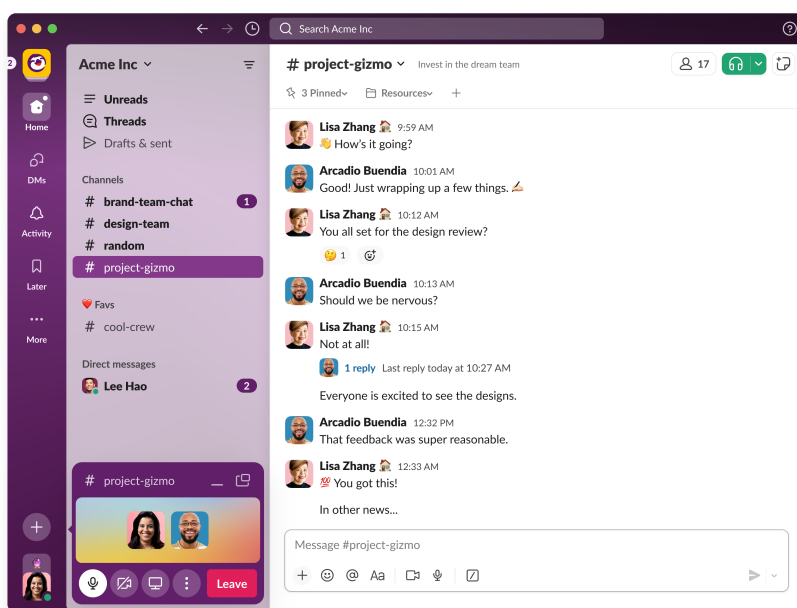
"Those instant huddles are really powerful in this work-from-home environment. Our experts on the front line need an outlet to be able to debrief with someone who understands their role. And so when we're all at home, using huddles is really key to looking after mental health."

Gabrielle Dracopoulos
Head of Customer Success, **Intuit**

Agents can also use Slack **clips** to record their thoughts about specific incidents. Meanwhile, customers can record clips to demonstrate issues they're having, and share them with agents via **Slack Connect** channels.

Similar to huddles, clips are automatically transcribed for posterity. They also feature live captioning, making them more accessible and easier to quickly scan.

Clips have become a game changer for computer maker **Dell Technologies**. The company lets customers test out digital versions of its hardware and products, and then share video recordings of their feedback via Slack clips. That way, agents get a much more comprehensive, tactile view of any technical issues customers might be experiencing, so they can understand and resolve them faster.

"With clips, we can see exactly what the customer is looking at via video, which helps us provide support and resolve any issues much faster."

David Felt
Technical Marketing Engineer, **Dell Technologies**

Automate your service team processes

Typically, service agents spend a lot of time on routine administrative tasks, like requesting approvals or sharing customer feedback with product teams. With Slack, many of these tasks can be automated, freeing up agents to work on more impactful and satisfying work.

For example, companies can use Slack's **Workflow Builder** to streamline and standardize the intake of customer feedback. A workflow in a dedicated Slack channel can quickly guide agents through the process, collecting all the required information and keeping it structured and organized.
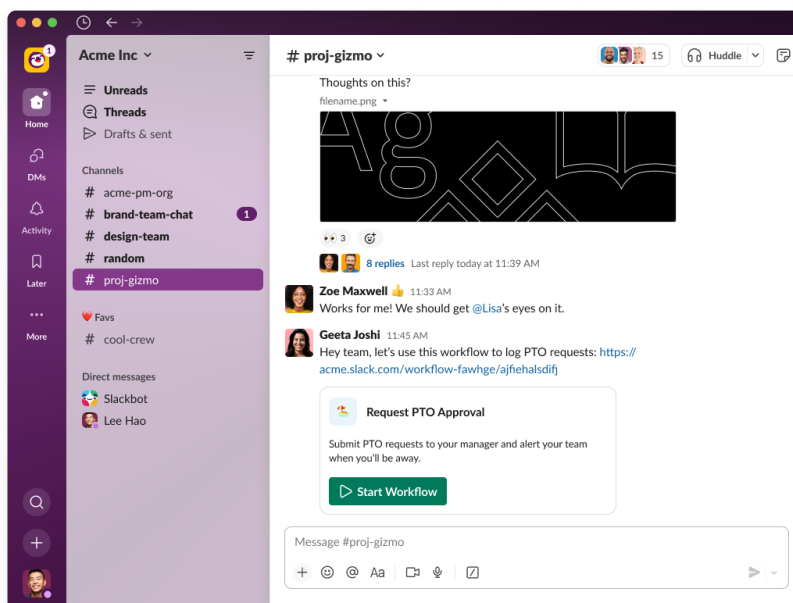
To better support its base of more than 100 million customers, the service team at telecom giant **T-Mobile** turned to Slack. The team uses workflows to more easily accomplish tasks like giving status updates to managers or sharing peer recognition.

"I always felt I was chasing after people, trying to get the information that I needed from them. Now everyone has become more productive and efficient. It's a win-win."

Rasha Alkhatib
Customer Experience Manager, **T-Mobile**

Other automation and AI magic is on the way: **Slack AI** creates AI-generated summaries and writing assistance, while **Einstein Knowledge Bot** will provide conversational answers from your knowledge articles while your team is swarming.

Transform the customer experience

Of course, customers appreciate having their issues resolved quickly and dealing with a single point of contact—both of which are made possible when service teams use Slack. But there are other ways that Slack can help power a better experience for customers.

Create a relationship with your customers

The more customers you acquire, the more challenging it becomes to deliver a truly personalized experience.

Slack makes it possible to scale your customer service motion while maintaining high-quality support. With **Slack Connect** channels, you can empower customer-facing teams to engage directly with customer contacts. This not only provides a more personal, transparent experience for customers, but it reduces case handoffs and escalations and decreases resolution time.
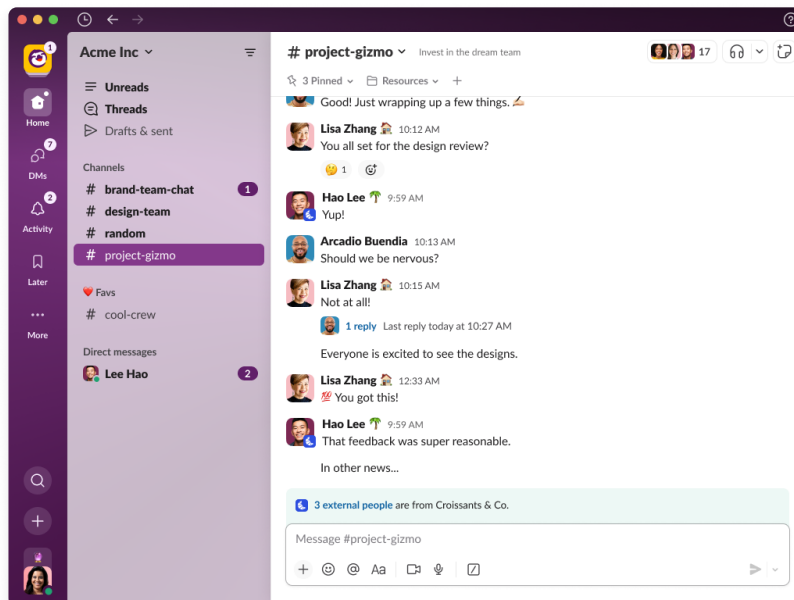
At support agency **Influx**, they've set up individual Slack Connect channels for specific customers, giving them a dedicated place to address incidents and share information. It's been especially helpful in the era of remote work, when Influx's agents can't gather in the same physical space.

"Everyone said you can't do call centers and digital support virtually. [But] Slack's an essential tool to make that all possible."

Alex Holmes
Chief Growth Officer, **Influx**

Measure the impact of your customer service

While it may seem like great customer service is hard to quantify, there are actually plenty of metrics demonstrating the value of embracing a platform for service teams.

According to a 2021 **Forrester Consulting Total Economic Impact study**[2], surveyed service teams using Slack reported:

- Decreased case resolution time by 26%
- Reduced escalations by 17.4%
- Cut the cost per ticket by 15.1%
- Saw an average increase in CSAT by 11.4%
- Boosted employee satisfaction by an average of 5.9%
- Enjoyed an average NPS increase of 9.2%[3]

[2] Source: Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

Get started

Ready to learn how you can improve your customer service with Slack as your productivity platform? **Talk to our sales team** today.

For more resources, visit our **Slack for Service Teams blog collection**, browse our **App Directory** for a sampling of the many ticketing tools and customer service apps you can integrate with Slack, or head to our **Customer Service solutions hub** to view webinars, download e-books, and read stories about how leading companies use Slack as their intelligent productivity platform.

About Slack

Slack is on a mission to make people's working lives simpler, more pleasant and more productive. It is the productivity platform for customer companies that improves performance by empowering everyone with no-code automation, making search and knowledge sharing seamless, and keeping teams connected and engaged as they move work forward together. As part of Salesforce, Slack is deeply integrated into the Salesforce Customer 360, supercharging productivity across sales, service and marketing teams. To learn more and get started with Slack for free, visit slack.com or connect with us @SlackHQ.