A guide to proactive support

Table of Contents

Introduction

Does your company provide excellent customer support? If your instinctive answer to that question is yes, how confident are you that you're right?

What if I told you that studies prove there's a huge difference between what brands think of themselves, compared to what customers actually think about them? Statistics don't lie. **Although 80% of businesses** say that the service they deliver is "superior," only 8% of customers agree that it actually is.

That's where the importance of proactive support comes in.

If executed correctly, you can use it to prove to your customers that the quality of your support can be as awesome as you truly think it is. But it can be difficult to understand exactly what proactive support entails, and that's what lead to the birth of this guide.

First, let's discuss the key differences between the proactive support you should strive to offer, and traditional reactive support used by most companies.

Reactive and proactive customer support explained

# Reactive and proactive customer support explained

Most companies approach customer support with the preconceived notion that a customer should first come to them with a question or a problem, only after which they should offer support.

This is known as reactive support, since assistance is only offered after a customer makes the first move. With a reactive support experience, a customer usually visits your site, contacts a customer service agent, describes their problem, and waits for a solution. This process might take place over email, over the phone, within a live chat session, or on social media.

But the problem with this kind of approach, is that it puts all the pressure on your customers, to do most of the work. Besides, most customers won't take the initiative to reach out when they have a problem to begin with. An astonishing **96% of unhappy customers** say that they don't complain to customer service.

It takes time to find a brand's contact information, reach out, and wait for a response. This is time that most customers don't want to waste. Research shows that **60% of customers** want easier access to online support channels, while 53% want faster agent response times.

If you could choose two things for organizations to improve in customer service, what would they be? (Select two), 8/16
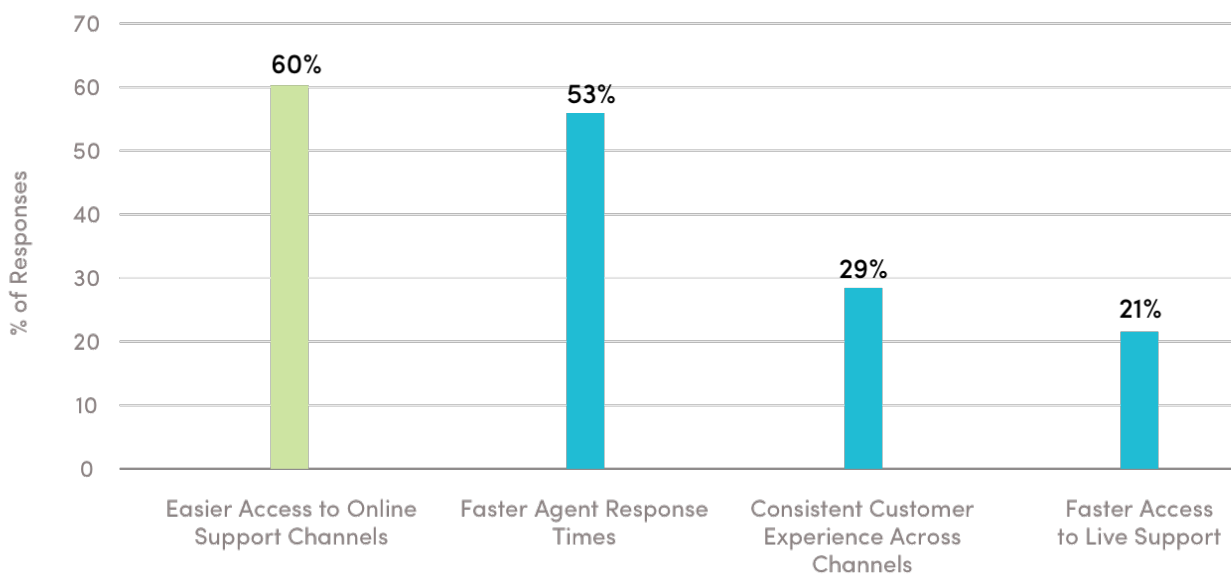
Proactive support is the answer.

With proactive support, customers can find solutions to their problems on their terms, freeing up your agents from answering the same questions repeatedly.

With proactive support, customers can find solutions to their problems on their terms, freeing up your agents from answering the same questions repeatedly.

Customers won't necessarily have to contact an agent to find answers. This can involve FAQ pages, how-to videos, forums, and more. This also frees up your support team to solve more pressing, urgent problems, like handing out a refund to a previous buyer. For example, just one person at **Smallpdf** is able to handle support for **15 million users** thanks to a proactive approach to customer support.

> *"I always try to read between the lines and identify the root problem, even before customers know what it is."*
> — Hung Nguyen, Customer Satisfaction Manager, Smallpdf

On their site, they have a page listing common problems, as well as the solution to each recurring issue.

This way, customers can find the answer they're looking for, without contacting or having to wait for the support team. This also leads to a decrease in the number of agents required on call at all times.

COMMON PROBLEMS
Process can't complete/it takes long long! ⌄
I can't find my file / where does my file go? ⌄
Is Smallpdf safe to use? Will my file to be deleted? ⌄
After using smallpdf my document looks different. What can I do? ⌄
[Compress PDF] Further compression required? ⌄
[Office to PDF] Font Problems. ⌄
How can i rearrange the pages in a PDF? ⌄

The benefits of proactive support don't end here. It has been statistically proven, that implementing proactive support increases the success of the company. Not only is it a convenient option, it also takes your support experience to heightened standards. **71% of consumers will leave a company** due to poor customer service, so the kind of service you offer is constantly under the scanner.

According to the **2017 UKCCF proactive customer service survey**, a staggering 87% of businesses believe that proactive service will save them money on inbound contacts. It can also help brands save money on operational costs and boost overall customer retention.

In the next chapter, we'll talk about how to create your company's proactive approach to support.

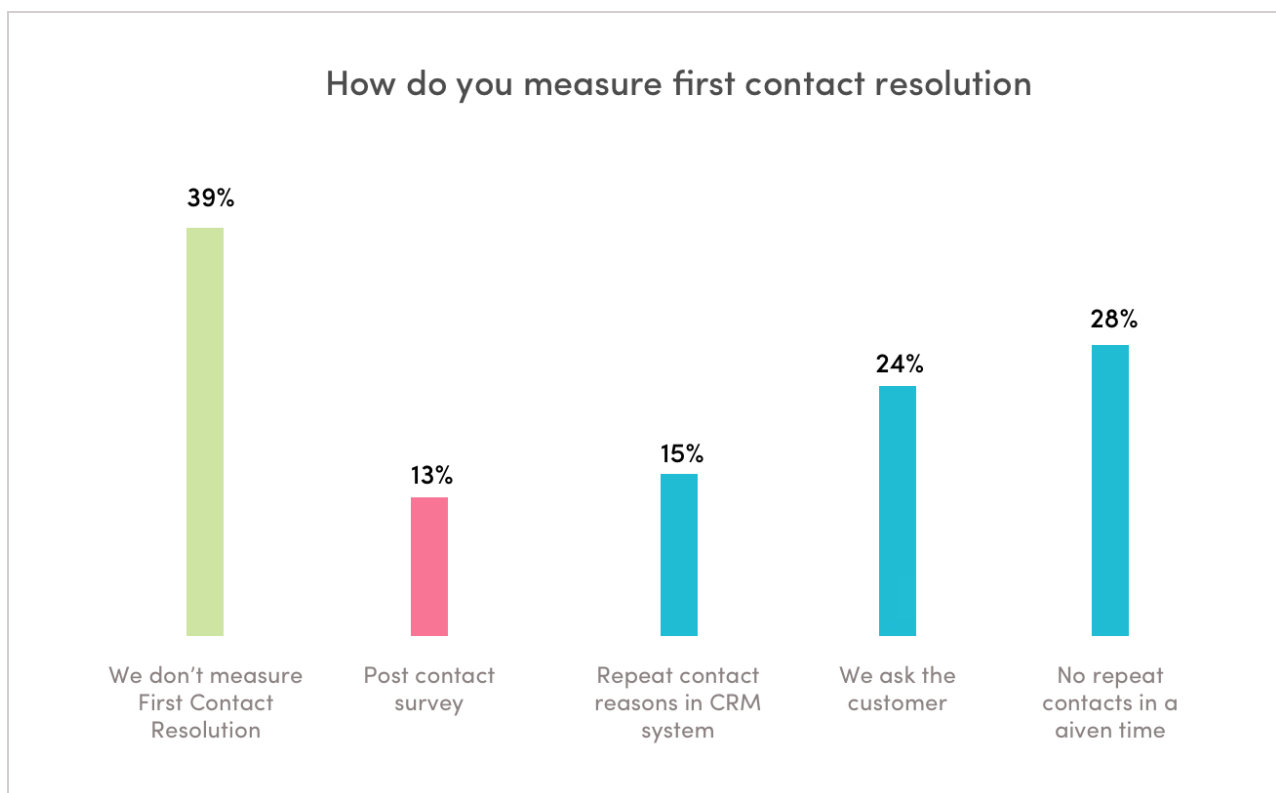# How to create a proactive approach to support

How to create a proactive approach to support

Now that you know what proactive support is, how it differs from reactive support, and how it can lead to success, let's talk about how you can get started with implementing it. You begin by identifying the recurring support issues that your team deals with on a regular basis.

Identify recurring support issues

If you aren't keeping a record of interactions with customers, you won't be able to discover the areas of support that you need to be proactive about. Any time you and your team see a spike in inquiries about a certain area, you can assume that most other customers are dealing with the same issue.

One way to keep track of recurring issues is to track first contact resolution, commonly referred to as FCR. Nearly 40% of companies don't measure FCR, so if you start tracking it, you're sure to be ahead of the game.

How do you measure first contact resolution

Category	Percentage
We don't measure First Contact Resolution	39%
Post contact survey	13%
Repeat contact reasons in CRM system	15%
We ask the customer	24%
No repeat contacts in a given time	28%

FCR refers to the number of support issues that were resolved by your customer service team within the first contact a customer has with your company.
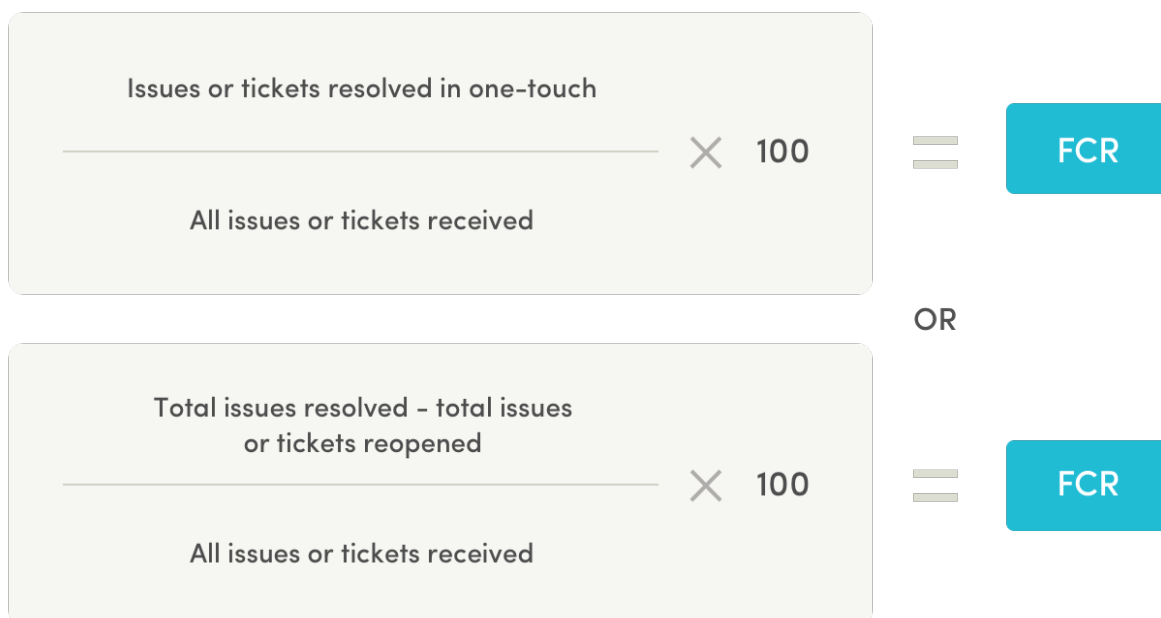
For live chats, this means that the issue was fixed before the chat customer closed out of the chat session, and the customer didn't have to contact your company about the same issue again.

For phone calls, it means that the problem was solved during a customer's first call before they hung up the phone.

You can calculate FCR by dividing the number of problems solved by support agents within a customer's first contact within a specific time frame, by the total amount of customer contacts your team received within the same amount of time.

Multiply that figure by 100 to find your brand's FCR percentage rate.

$$\frac{\text{Issues or tickets resolved in one-touch}}{\text{All issues or tickets received}} \times 100 = \text{FCR}$$

OR

$$\frac{\text{Total issues resolved - total issues or tickets reopened}}{\text{All issues or tickets received}} \times 100 = \text{FCR}$$

You can also subtract the total number of issues or tickets that were reopened from the total number of issues resolved, and divide that figure by the total tickets received. Then, multiply that number by 100, and you'll have your FCR percentage rate.

These calculations can help you narrow things down and uncover support issues that aren't being solved at first contact. You then create proactive support tools to help customers with the learning curve associated with these issues.

You should also track issues by category and go back through closed out tickets to search for trends. Once you've uncovered commonly recurring problems, organize them and present them to your team so that you can brainstorm about how you can solve these issues proactively. Another easy way to be proactive is to tell your customers as soon as you've made any kind of mistake. Don't wait until they notice to speak up.

Tell customers as soon as you made a mistake

Have you ever experienced a technical issue and received a huge increase in support tickets, live chat sessions, phone calls, or social media mentions? There's nothing worse than trying to deal with hundreds of customer questions while also trying to fix an issue as fast as possible.

The easiest way to avoid some of the stress is to proactively tell customers as soon as there's a problem at your end. By facing problems head-on, you can build customer trust and avoid damaging your brands reputation.

Taking this extra step can help you retain current customers and gain new ones, since **84% of people** say that they want to buy from brands that they know and trust. Additionally, **more than half (58%)** of adults say that they don't really trust a company until they have witnessed "real world proof" that it keeps its promises.

Customers know that everybody makes mistakes. But the problem will escalate when they find out that your brand tried to hide or ignore a problem. For example, if your server is down, send out a social media post announcing it to customers immediately like Warface did in this tweet.

> **Warface** ✔
> @Warface   [Follow]
>
> Dear PS4 players! The servers will be restarted at 09:00 UTC, the approximate down time is 10 minutes. Sorry for any inconvenience caused.

Or if you found out that you accidentally shipped a customer the wrong item during inventory, take it upon yourself to shoot them an email and tell them how you're going to make it right. Let customers know what you're doing to find solutions, and make sure they know who to contact in case of emergencies or if they have additional questions.

You can even offer a refund or an exclusive discount if your approach to solving the problem doesn't make a customer happy. Here's a strong example of an "oops" email sent from Shutterfly to their email subscribers, for sending out several unwanted emails.
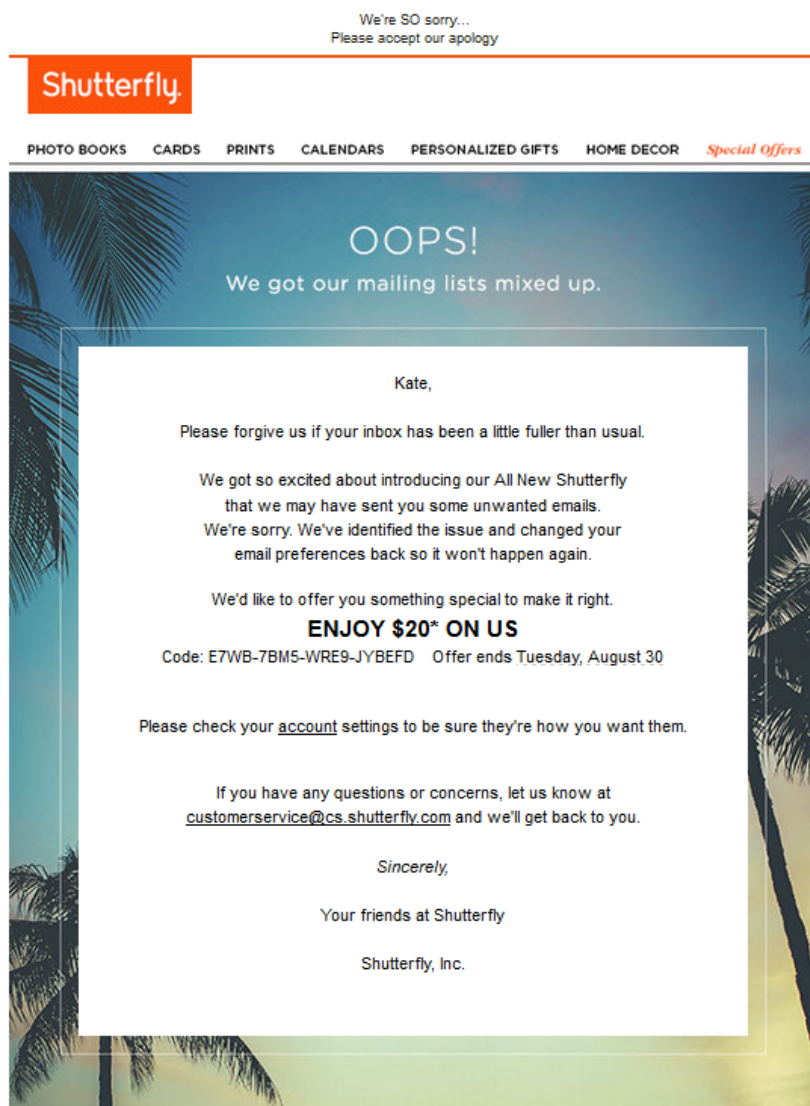
Create an email template similar to this example that you can use to admit your mistakes to customers.

You should also think proactively about customer loyalty and provide recommendations to clients based on their previous purchases or browsing history.

Think proactively about customer loyalty and purchasing recommendations

Loyalty programs are one of many keys to building stronger relationships with your customers.

When you go out on a limb and proactively offer special discounts and perks, you can create a deeper, lasting connection with buyers.

Most customers from around the globe join loyalty programs because a brand offered an incentive, provides valuable rewards, or because they just discovered a new brand.

Why else should you care? If consumers like your loyalty program, they'll spend more.

Up to 86% of consumers in North America say that they'll shop more if they like a company's rewards program.

Why Join Loyalty Program?

Offered an incentive	28% (North America) / 28% (Europe) / 45% (Asia)
Valuable Rewards	27% (North America) / 23% (Europe) / 44% (Asia)
Discovered New Brand	16% (North America) / 15% (Europe) / 40% (Asia)

Asia — Europe — North America

If they like the loyalty program, consumers shop more.

North America	Europe	Asia
86%	82%	94%

By offering people tangible rewards before they ask for a discount, you can show your appreciation to customers before they begin to wonder if you value them. And it'll save you money on customer acquisition since recruiting new shoppers costs seven times as much as retaining current ones does.

You should also track and understand customers' browsing and purchasing habits, so you can proactively recommend content, services, or products that they might like. Some of the world's most successful brands do this.

Take **Amazon's daily recommendations page**, for example, which generates **35% of Amazon's revenue.** It's a daily group of products that Amazon thinks a user might want or need based on their previous purchases or viewing history.

Or **Spotify's personalized "Discover Wveekly" playlists**, which include unheard songs related to a user's previous listening history.
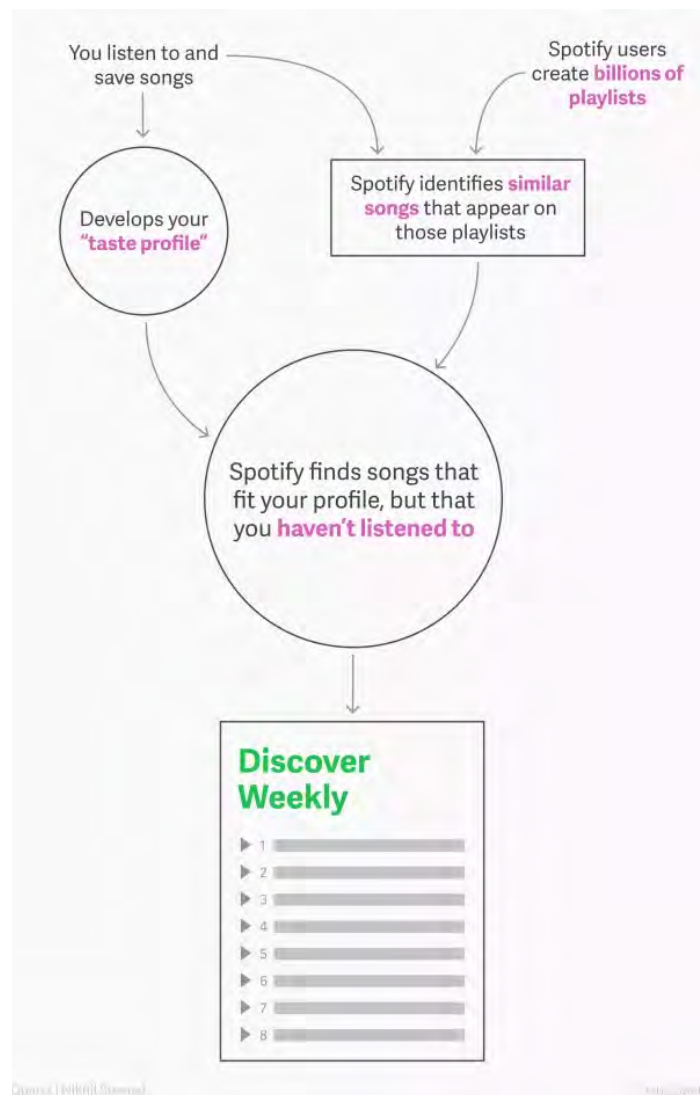
Spotify users rave about the fact that the music added to their playlist each week fits their taste perfectly. Just look at what this Spotify customer had to say about the Discover Weekly playlist on Twitter:

Even the **New York Times** proactively recommends content to users by listing related articles in the sidebar of their site's pages.

Recommended For You

Brexit Is Coming Down to a
Game of Brinkmanship

Cryptocurrency Ransom
Demanded for Wife of
Norwegian Tycoon

Foxboro(ugh!): Where Visiting
N.F.L. Teams Hate to Play

Matt Kuchar Extends His Lead in
Hawaii

By harnessing the power of artificial intelligence (AI) to track customer data and proactively recommend what custoers might want to read, watch, listen to, or buy next, you not only make things easier for them, you also show them that you are prioritising their needs. It will feel like a recommendation from a friend, and that's the feeling you want to spread.
Use this opportunity to proactively upsell and cross-sell without being too obvious about it.

Now that you have a few ideas about how you can create a proactive approach to customer support, you'll need a tool to help bring all your plans together.

Luckily, you can charge at your entire proactive support strategy head-on with the help of Freshdesk.

How can I create a proactive support strategy with Freshdesk?

How can I create a proactive support strategy with Freshdesk?

With Freshdesk's helpdesk, you can uncover common problems that customers experience or connect external apps like Shopify or Stripe to catch payment failures or abandoned carts. Within our platform, you can reach out to customers, on any support channel, before things get out of hand.

That way, you can understand and fix issues proactively to boost the overall experience that customers have when interacting with your brand. In Freshdesk, you can add self-service to your list of support options so that customers can find solutions on their own terms.

Use self-service

Your agents can only handle a few customers at once when it comes to email, chat, ticketing, or social media. And when it comes to phone support, your agents can (usually) only deal with one customer at a time.

But what if you could free up your agents' time so that they could focus on more urgent problems instead or devote more of their energy to every ticket that ends up coming through? Thankfully, you can. With the help of self-service material, you can take some of the load off of your agents.

In the United States, **90% of consumers** expect for a brand or organization to have an online self-service portal. That figure is even higher in Brazil at 98%.

So if you don't have an online self-service resource of some kind, you're not giving the majority of people what they truly want. When it comes to comparing self-service to human contact, **40% of customers** would rather use self-service than having to speak to a human agent.

Once you create a guide, article, or video explaining how to solve a certain problem or complete a task, you can send the link to every customer who asks about it. There are different forms of self-service out there, such as FAQ sections, knowledge bases, product demos, ebook guides, how-to videos, and more.

These resources can help your agents provide comprehensive service without having to explain common problems again and again. Of these resources, knowledge bases are the most frequently used.

And if your customers can find information themselves in a searchable knowledge base, your team won't have to spend any time explaining things to them.

[Creating a knowledge base in Freshdesk](#) that can help proactively solve customer issues is easy. Our free knowledge base software is packed with sophisticated features like rich text editors and attachment support, so you can create a database of customized answers to commonly asked questions.

Serve customers from across the world by adding translations and language-specific tags so that customers from every location can find what they're looking for. You can even include meta information to optimize every article so that your knowledge base posts show up on the search engine results pages.
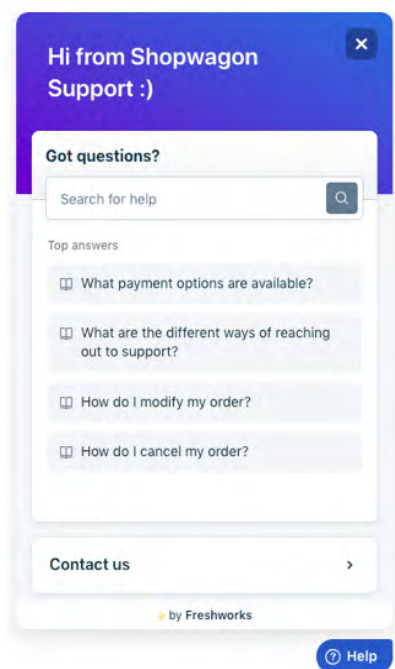
Modern help experience
Provide support options right on your website
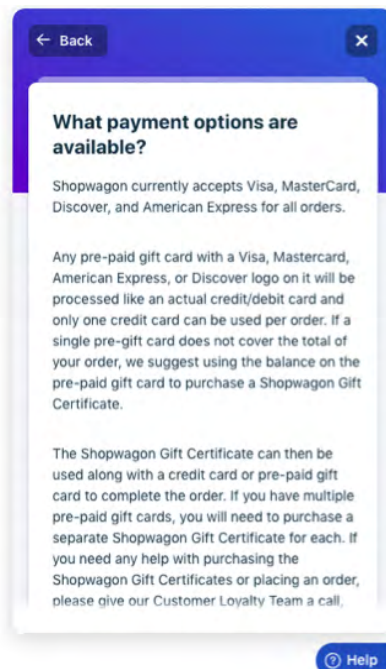
Self service anywhere
Show solutions without taking users to a portal

With our software, you can create separate articles for customers and agents by selecting the visibility of your posts.

That way, you can create internal resources to make the new agent onboarding process easier.

If your company sends out lengthy support explanations, you can reuse them by changing them a bit and turning them into a solution article. When creating knowledge base articles, search through old ticket responses or email answers. Then, convert the copy into a knowledge base solution.

Don't forget to customize each article by changing colors or adding in logos so that your knowledge base resources are a reflection of your branding. It's hard to be proactive if you aren't gathering feedback from customers.

Gather feedback

If you don't know what your customers are struggling with, you can't solve their problems ahead of time. That's why gathering feedback from customers is so important. According to Temkin Group research, 30% of customers tell the company after they have a bad experience, while 15% of customers give feedback ratings on company websites.

Approximately 63% of customer experience professionals say that they harness the power of customer feedback to plan ahead for investment in better customer experiences, services, and products. And you can take the same proactive approach. Luckily, Freshdesk makes it easy to collect suggestions and feedback from your customers.

Our help widget helps people get in touch with your brand and submit feedback right from your website with just one click.
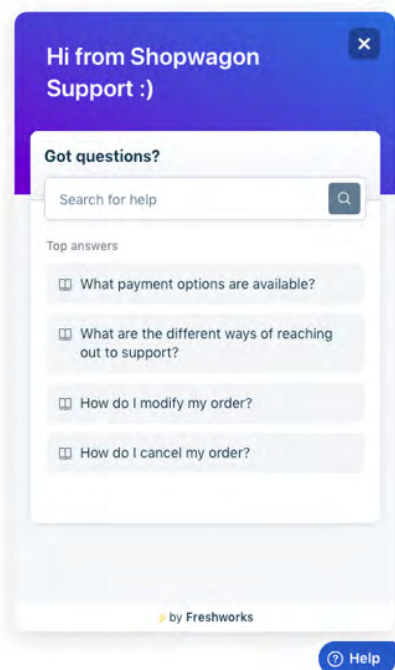
Optimize for deflection
Hide contact options in homepage
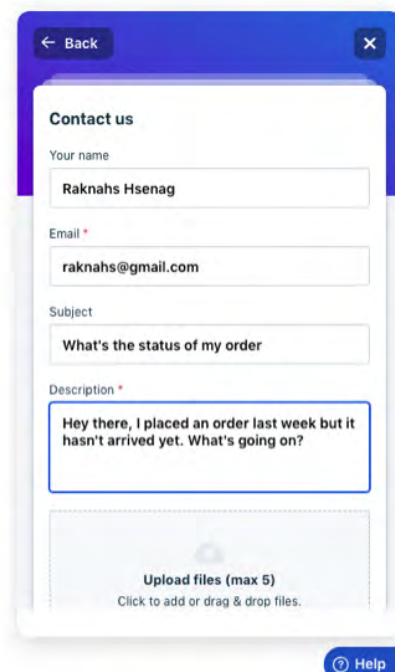
Contact form
Show all ticket fields, or just a simple form

Another way to collect and monitor feedback is to gather **customer satisfaction ratings**, also known as CSAT ratings. A CSAT survey should be sent out to customers asking them to rate their level of satisfaction with your company or support team.

These surveys are typically designed on a ranking scale. For example, "one" might be "not satisfied at all," while five is "very satisfied."

How satisfied are you with our services?

Extremely Unsatisfied	Unsatisfied	Neutral	Satisfied	Extremely Satisfied
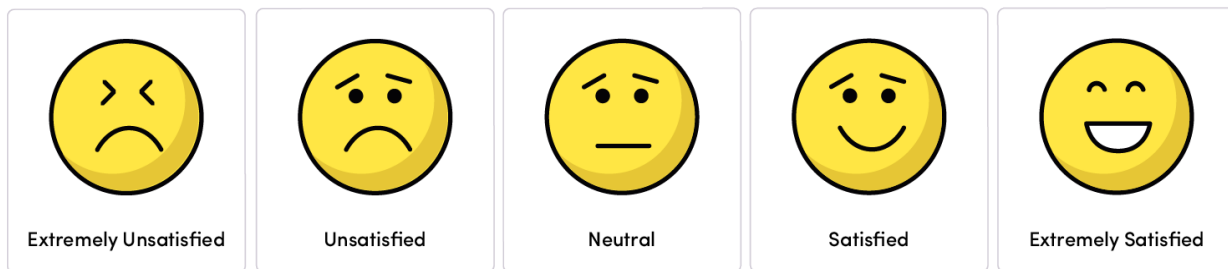
This can help you measure the quality of your brand's customer support and evaluate your current strategy to create a more proactive approach in the future. Send these surveys immediately after you have interacted with each customer to receive the most reliable feedback.

In Freshdesk, you can **automate the survey process** by choosing to send a CSAT survey link as soon as a ticket is resolved. You can even create a seven-point scale to receive feedback with pinpoint accuracy or allow customers to provide open responses where they can further elaborate on their rating. Our software tracks trends in your CSAT scores and generates reports on your ratings so that you can always see a detailed outlook that lets you know what areas of support you need to be more proactive about.

It's hard to be proactive if you can't see what people are saying about your business online. That's why a social media monitoring tool is a must.

Monitor social media

Tons of people would rather reach out to brands on social media for their customer service needs instead of using traditional methods like email or phone. In fact, almost **70% of consumers** say that they have used social media to solve customer service problems at least once.

If you're in business, people will talk about you. Sometimes by word of mouth, but other times on social media. And if other people are saying negative things about you, it could cost you. Recent research shows that **94% of consumers** will avoid a business due to negative reviews.
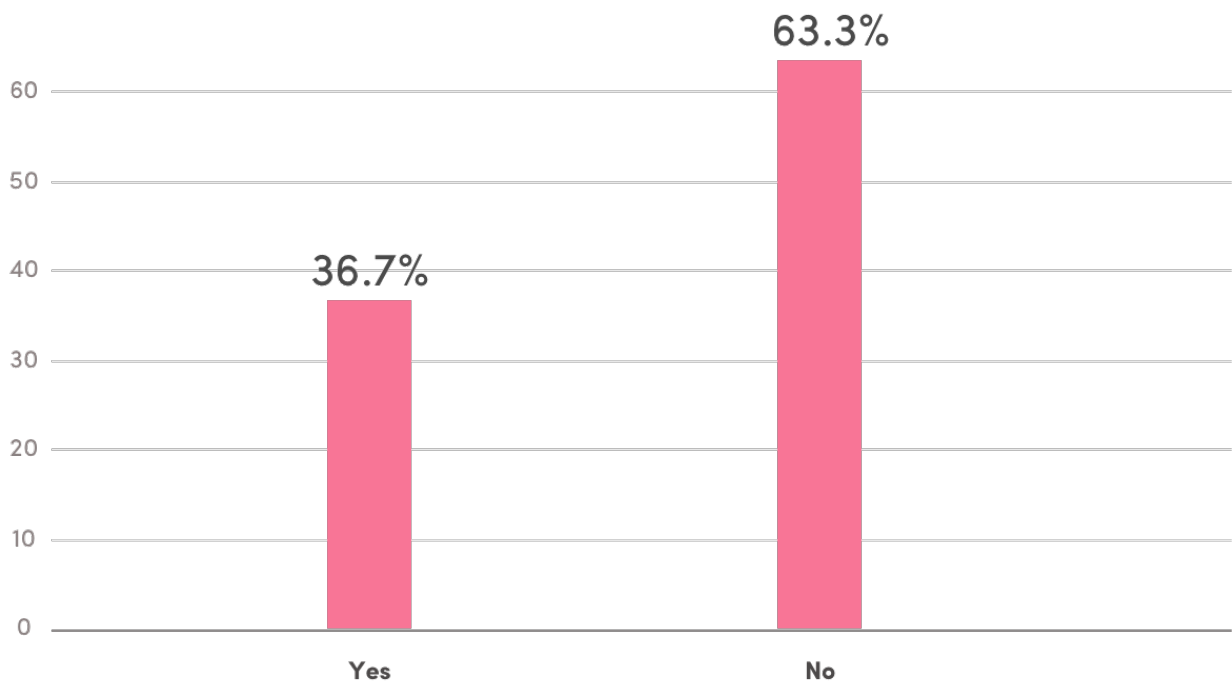
Has a negative review convinced you to avoid a business?

94.3% — Yes

5.7% — No
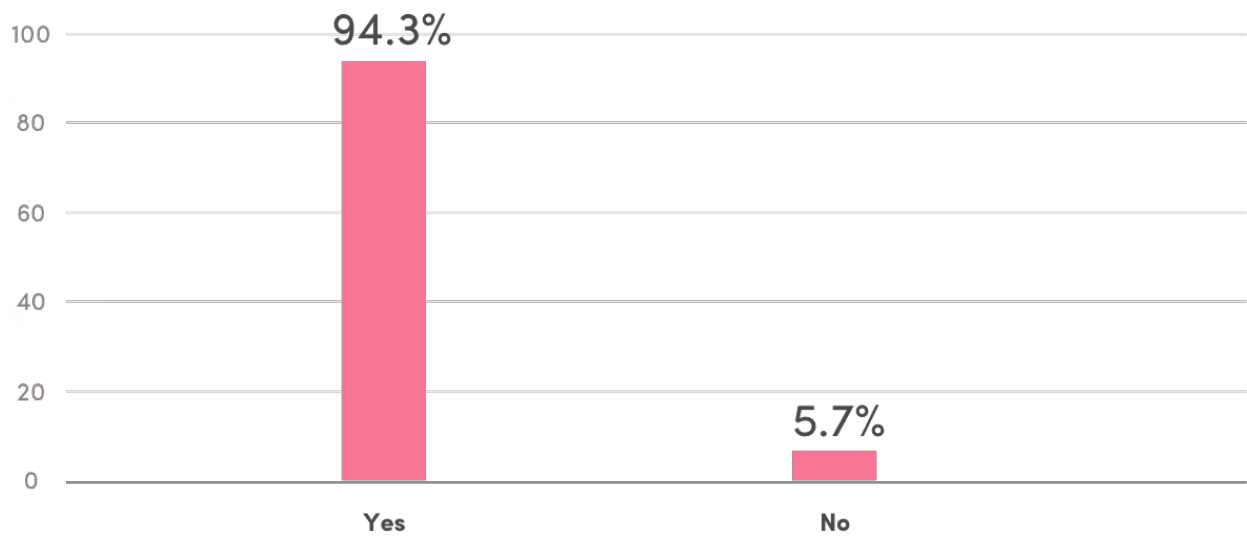
The same research shows that 63% of people have never received a response from a business that they've left a negative review about.

Has a business ever responded to a review you left online?

36.7% — Yes

63.3% — No

In addition to responding to negative reviews about your brand across the web, you should also respond to negative mentions of your brand on social media. While social media posts aren't necessarily regular reviews, people pay attention to what others say about companies across social channels.

For example, Dove was met with criticism online after a tweet about body-positivity didn't exactly sit right with customers, who began to poke fun at the post.

The same thing could happen to your business. And if you don't respond quickly or take action, the results could cause lasting damage to your brand's your reputation. That's why you should always respond to customers on social media as soon as possible before a small issue becomes a huge problem.

Be proactive and avoid going viral for all the wrong reasons by responding to people within four hours of their post, since that's when the majority of consumers expect a response.

People's Wait Time Expectation vs. Brand Response Time on Social
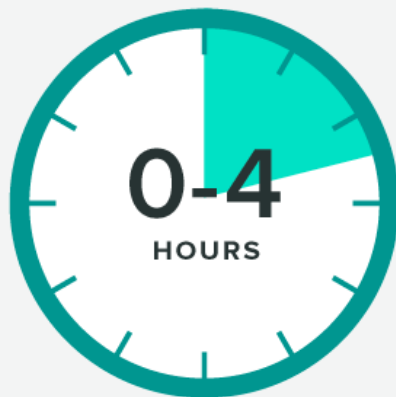
0-4 HOURS
CONSUMER EXPECTATION

10 HOURS
AVERAGE BRAND RESPONSE TIME

Be sure to catch any and all discussions by monitoring posts about your brand that may not include a direct @ mention.

This could even help you boost your company's satisfaction rate. Research shows that brands who use Twitter for customer service see a **19% increase in customer satisfaction**.

Freshdesk's social media monitoring tool can help you do just that. With it, you can track and respond to social posts to nip issues in the bud before tons of other people see them. Then, when they do, they'll notice that your brand responded promptly and engaged with the original post, which shows them that you truly care about engagement.

You can follow conversations, tags, and keywords that are relevant to your brand and your industry on Facebook and Twitter without ever having to exit the Freshdesk helpdesk.
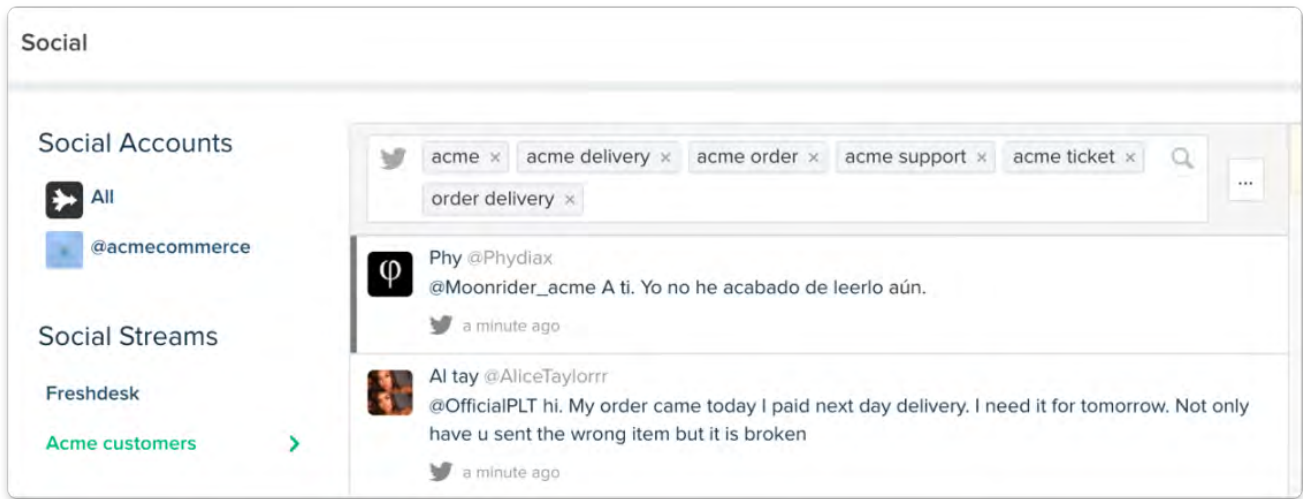
That way you'll never miss an indirect mention of your company again. Proactive live chat invitations can help you offer up assistance before customers even ask for it. If you don't already offer live chat on your site, you need to.

Offer live chat

Proactive chat can take your business's ROI to an entirely new level. A recent study found that businesses that have invested in proactive chat earned an [ROI of 105%](). Comparatively, the ROI for businesses with reactive chat was much lower at just 15%.

By presenting a **live chat** option to browsers when they first arrive on your page, you'll add a human touch to the interaction. People will appreciate that help is just a click away if they need assistance with ordering or finding what they need.

And you can even increase conversions with live chat. Research shows that site visitors who use live chat spend 55% more per purchase than visitors who don't. Nearly **80% of customers** prefer live chat because it can help them get answers to their questions immediately, while 51% say that prefer live chat because it helps them multi-task.

On top of that, nearly **40% of consumers** are more likely to purchase something from a company if they offer customer support via live chat. If you're not sure about whether to use a chatbot or a live agent, keep in mind that it might be ideal to have both so that agents can step in when bots can't handle the issue.

Be sure to use a bot that can determine when they have to send customers over to a human support agent. This will help you ensure that customers don't get frustrated while using the chat feature.

For example, a bot should be able to begin a conversation with a customer easily and identify keywords to suggest content, articles, and answers to their questions. But if the situation is too complex for the bot to handle, it should be able to connect the customer with an agent who can resolve the customer's queries.

[Freshworks' live chat support](#) is tightly integrated with Freshdesk and it is a simple way to start giving customers the chat options they deserve (and want).

With this feature, you can trigger proactive answers and messages that are based on customer behavior, send responses in real time, and collect important background information to gain a better understanding of each issue. Our live chat feature collects important contextual information like website path, ticket information, and user profile data.

You can assign specific chats to the members or groups that are best suited to deal with them. The tool also supports emojis and images so you can explain the solution through visuals.
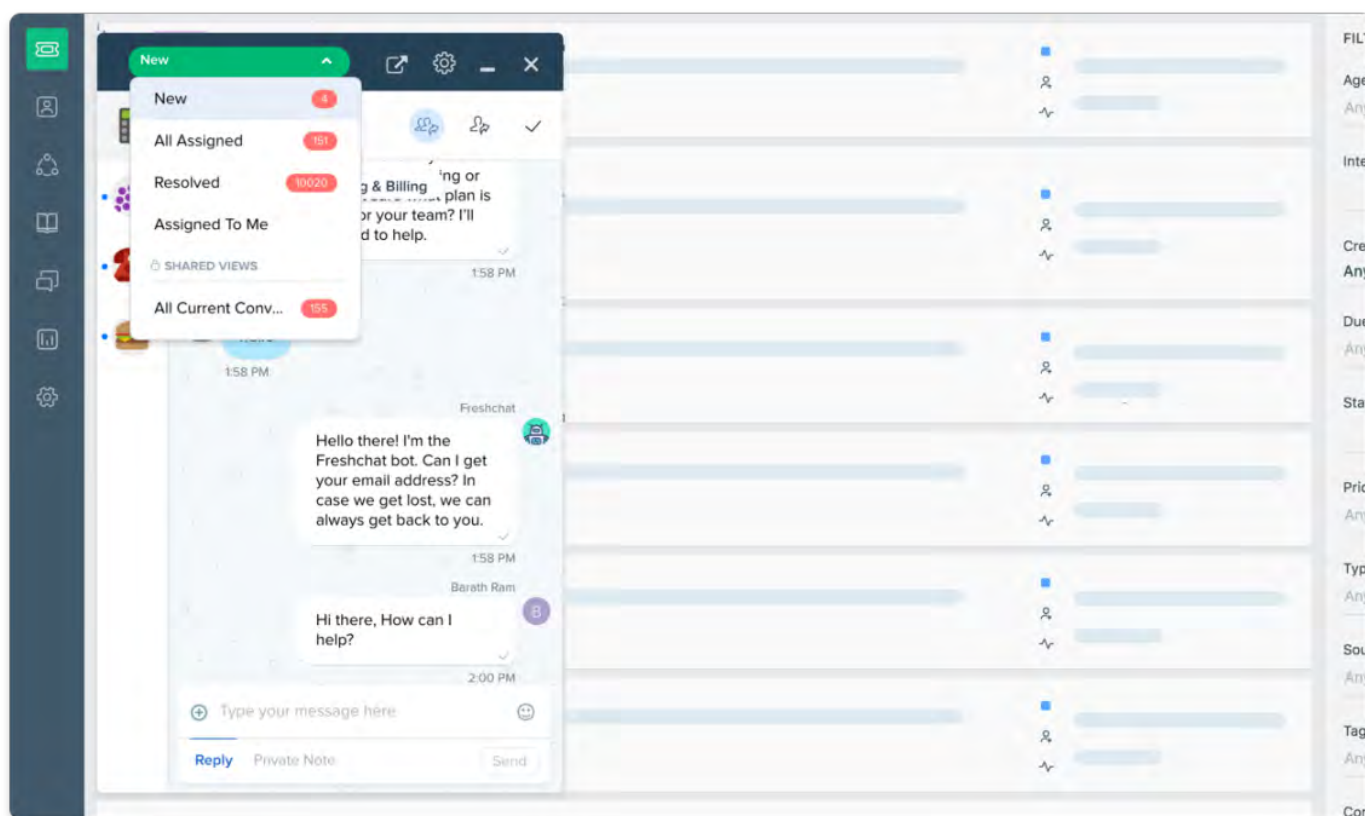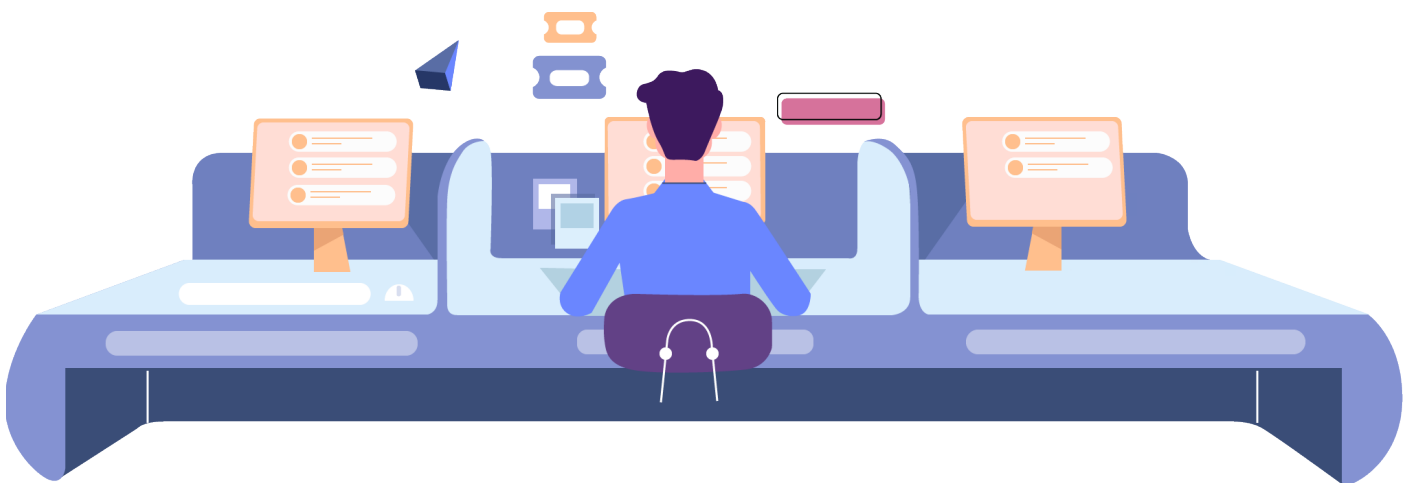
You can also easily convert chat conversations into helpdesk tickets on the dashboard.
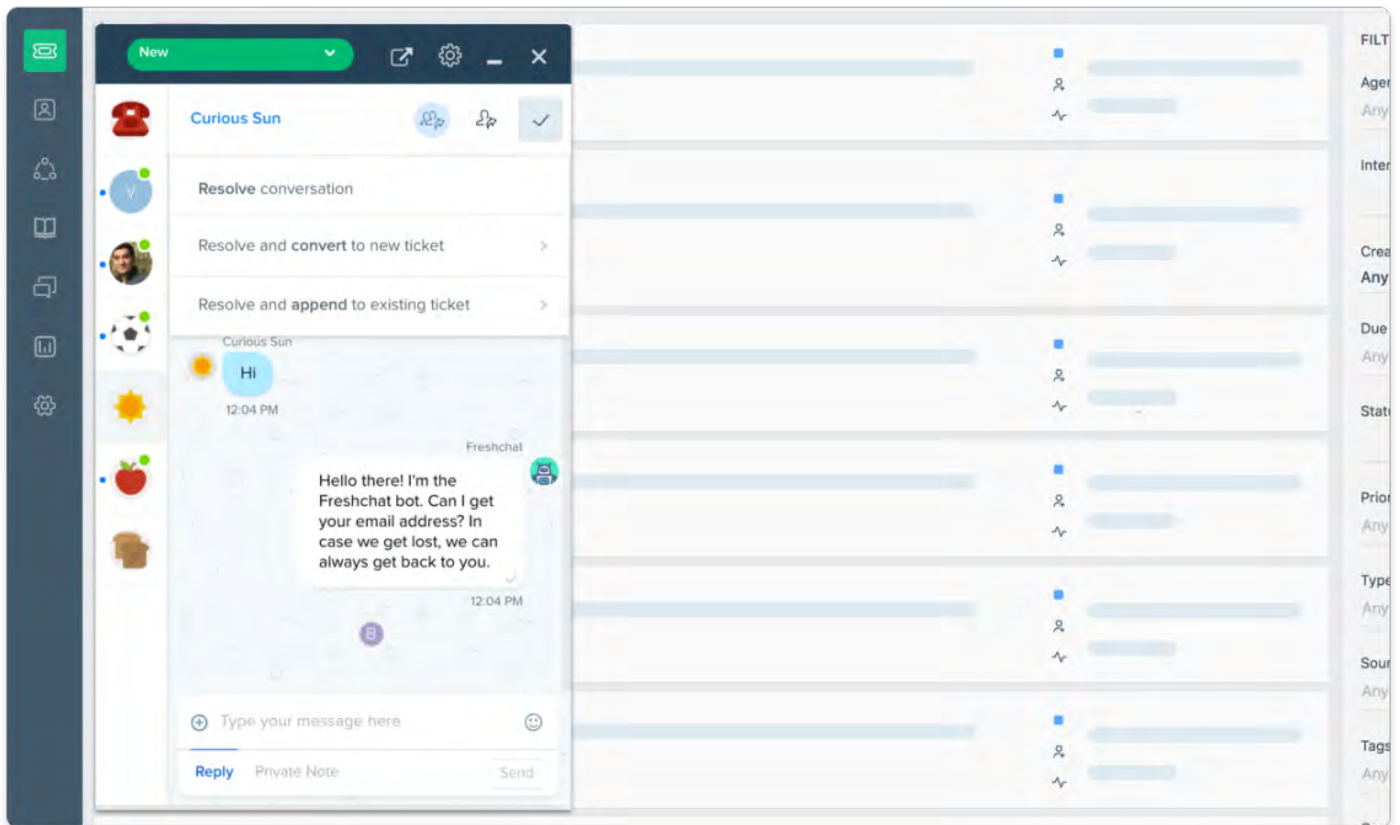
And once you create or receive a ticket, your entire team will be able to collaborate and organize every customer query.

# Allow your team to collaborate and organize tickets

By proactively making sure that all your support employees have the tools they need to offer exceptional support, you can enable them to work with confidence. People tend to perform better when they're not working on something all by themselves.

A recent study found that people who collaborate with others to complete a duty stayed on track **64% longer** than those who worked alone. They also claimed to have less fatigue and showed increased success in comparison to others who worked in silos. A separate **research from McKinsey** supports these claims. According to their data, a suite of knowledge sharing tools that allow for collaboration can improve productivity by nearly 30%.

In Freshdesk, team members can easily view and understand what the status of each ticket is at any given moment using **our collaboration feature**. Agents can send messages to one another to discuss tickets internally and teams can even split up several tasks involved in solving each ticket to get the issue taken care of quickly.
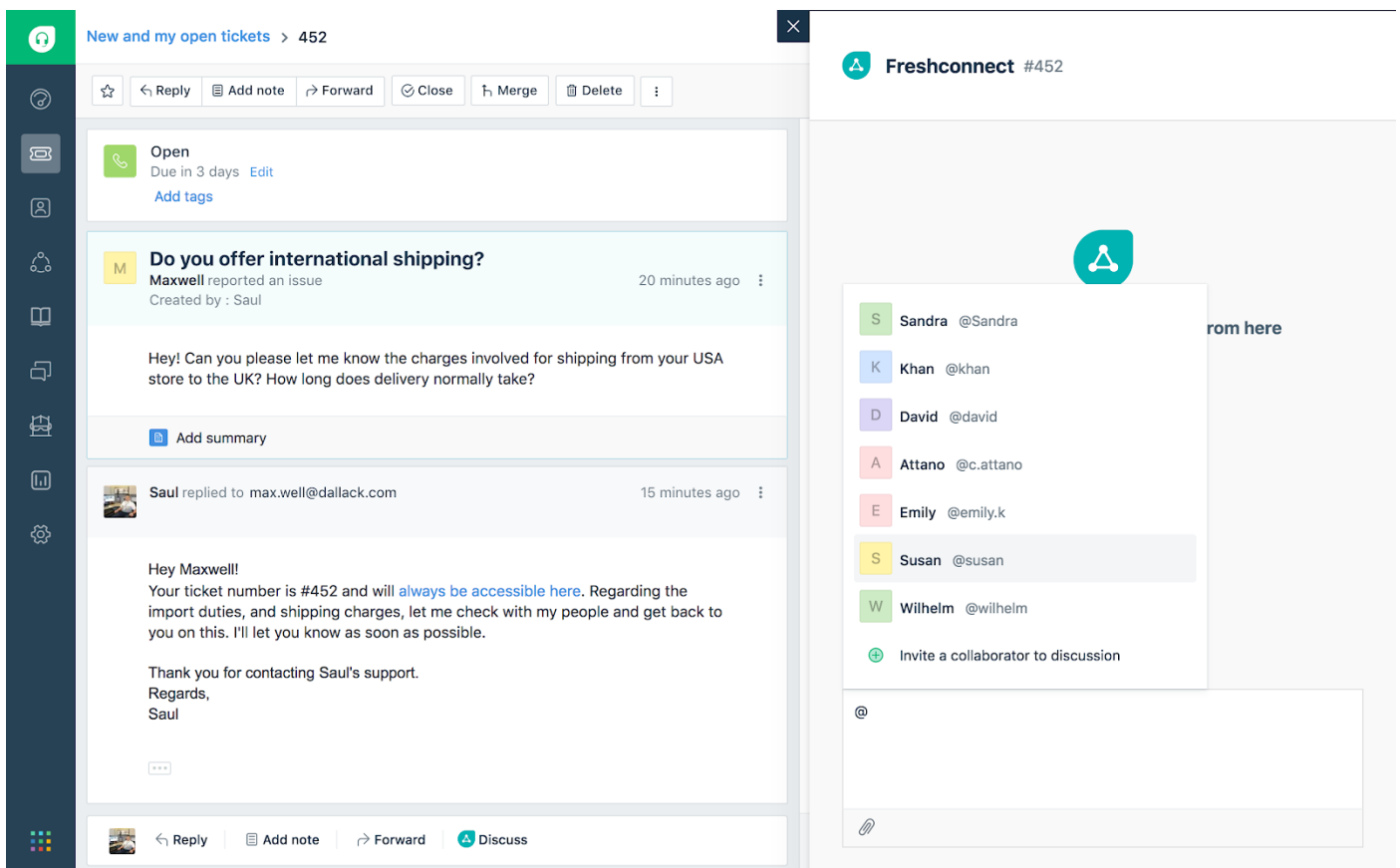

Team members can share ownership of more than one ticket at a time without losing their ability to access or view information, so every agent can always see the information they need to solve a problem.
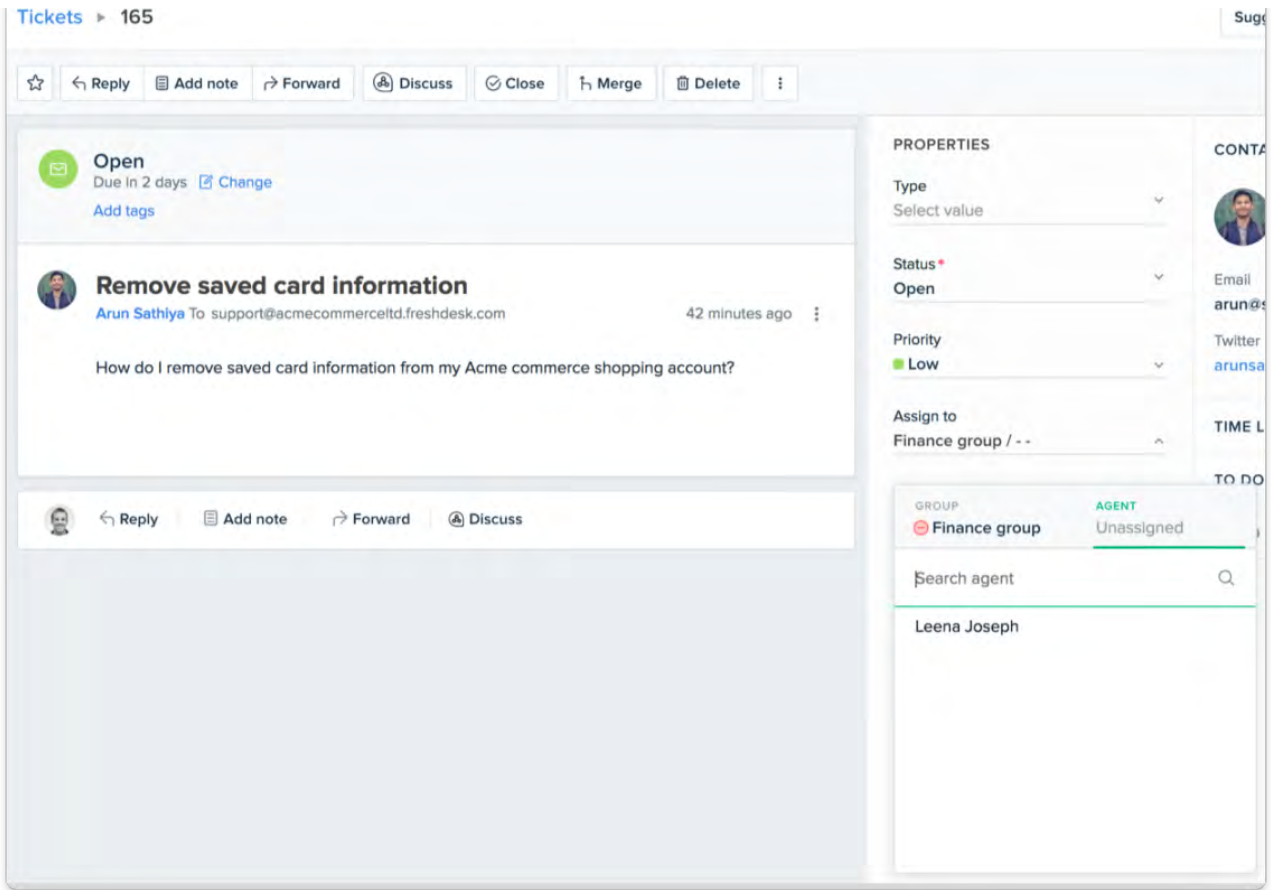
There's also a parent–child ticketing feature, so agents can divide and conquer large problems by splitting tickets into even smaller tasks. Every member has to complete their assigned tasks before the ticket is considered "resolved," so every one of your agents can be held accountable for their role.
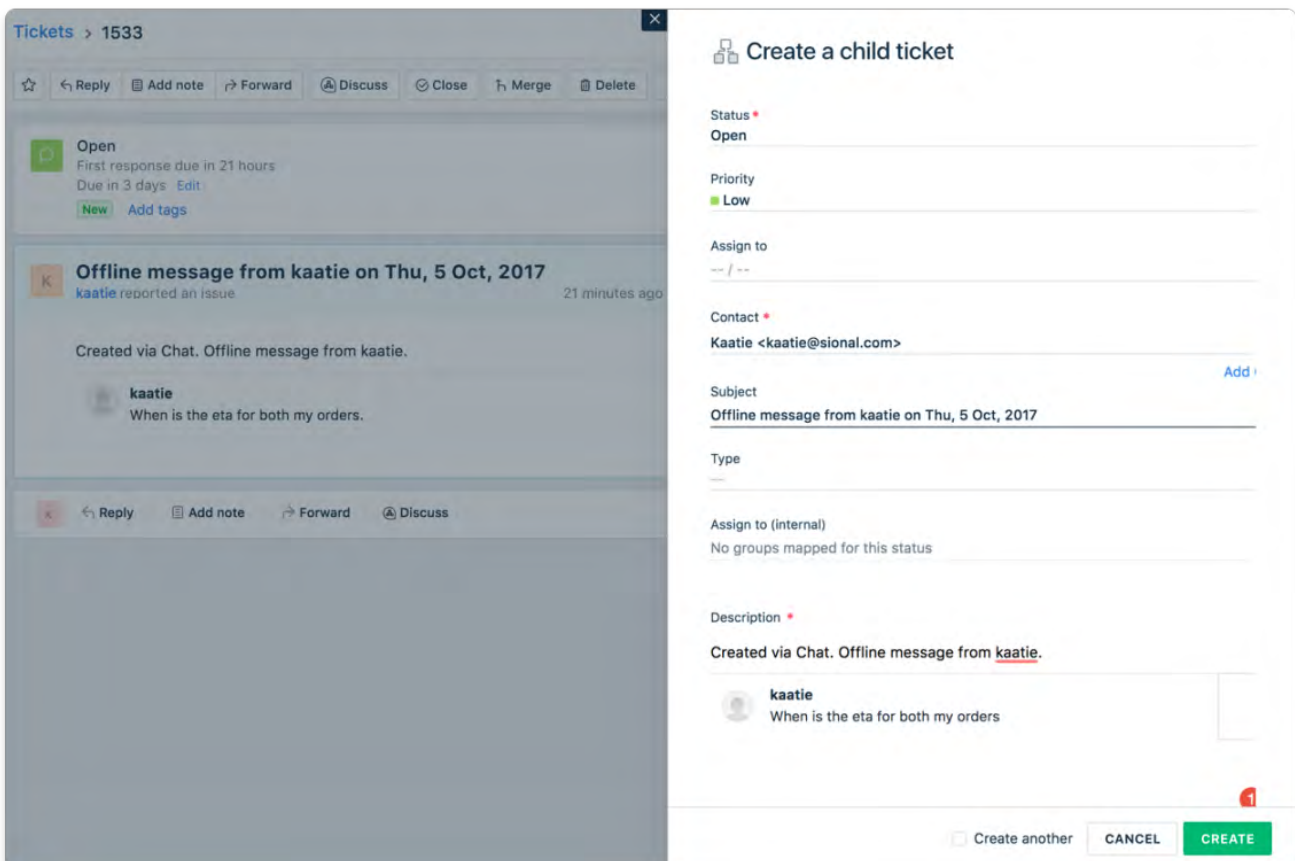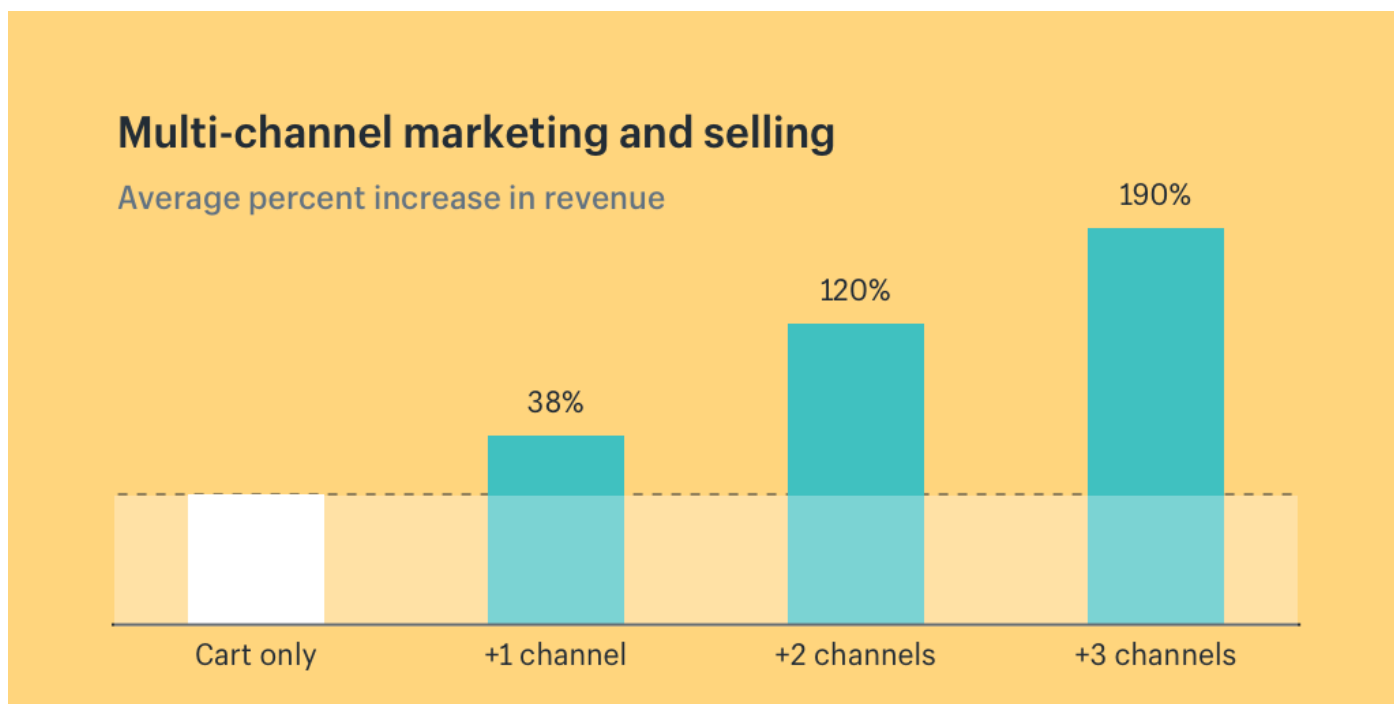
In our helpdesk, you can even link tickets together to make it easier to handle the load when experiencing an increase in requests. That way, no agent will lose track of previous tickets that relate to a current issue. Don't forget to implement multichannel support so that customers are covered no matter the touch-point they choose to get in touch with you.

Use omnichannel support to cover every customer touch-point

Taking a omnichannel approach toward your customers can have a huge impact on your bottom line. When it comes to using omnichannel tactics when marketing or selling, the positive effects on revenue are hard to ignore.

Companies who offer at least one extra channel see a **38% increase in revenue**. Those who use two extra channels see an increase of 120%. And those who offer three see a whopping 190% increase in revenue.

Multi-channel marketing and selling

Average percent increase in revenue

|	38%	120%	190%
Cart only	+1 channel	+2 channels	+3 channels

Offering more than one support channel can be just as beneficial. Most customers say that they prefer to contact brands across more than just one channel. In fact, today's consumers use an average of **up to six touch points** when buying an item. They need just as many options when it comes to getting the support they deserve.

By providing omnichannel support, you will avoid having tickets that might slip through the cracks or become "lost". They want options so that they can contact a brand on a channel that is the most convenient for them at any given moment. Therefore, it's important to proactively offer omnichannel support to make that process as seamless as possible for customers.

With **Freshdesk's omnichannel helpdesk**, you can reply to live chat questions, forms, emails, social mentions, and even answer phone calls with the help of Freshcaller, all from the same helpdesk.
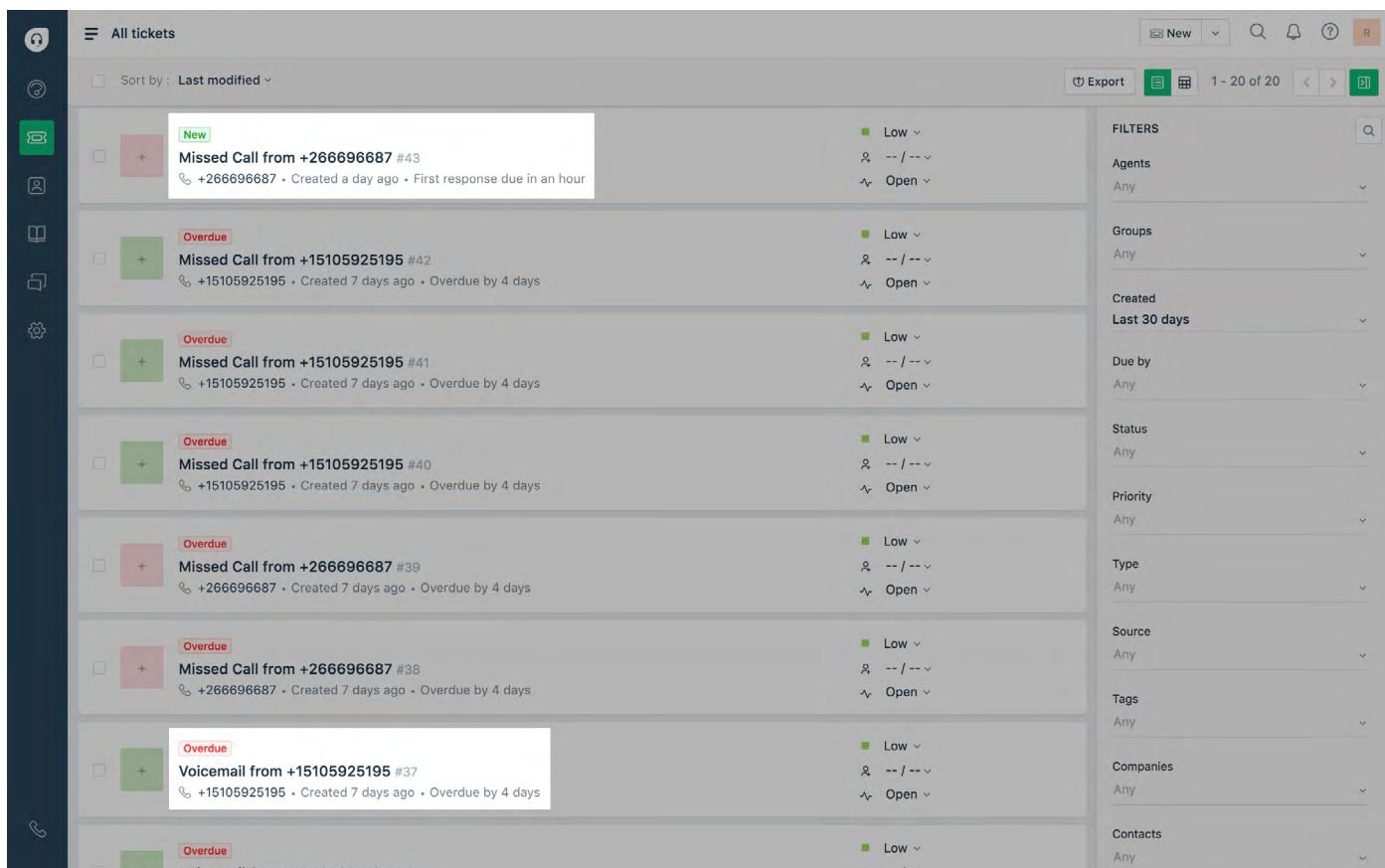

You can convert calls, chats, emails, and more into tickets as soon as you receive them, and you can categorize everything by priority or deadline. You can access email support, and manage, organize, and respond to multiple support emails at the same time, all while also keeping an eye on your call center (and every other support channel that people can contact you from).

Agents can record calls in Freshcaller, attach those recordings to tickets, and track conversations.
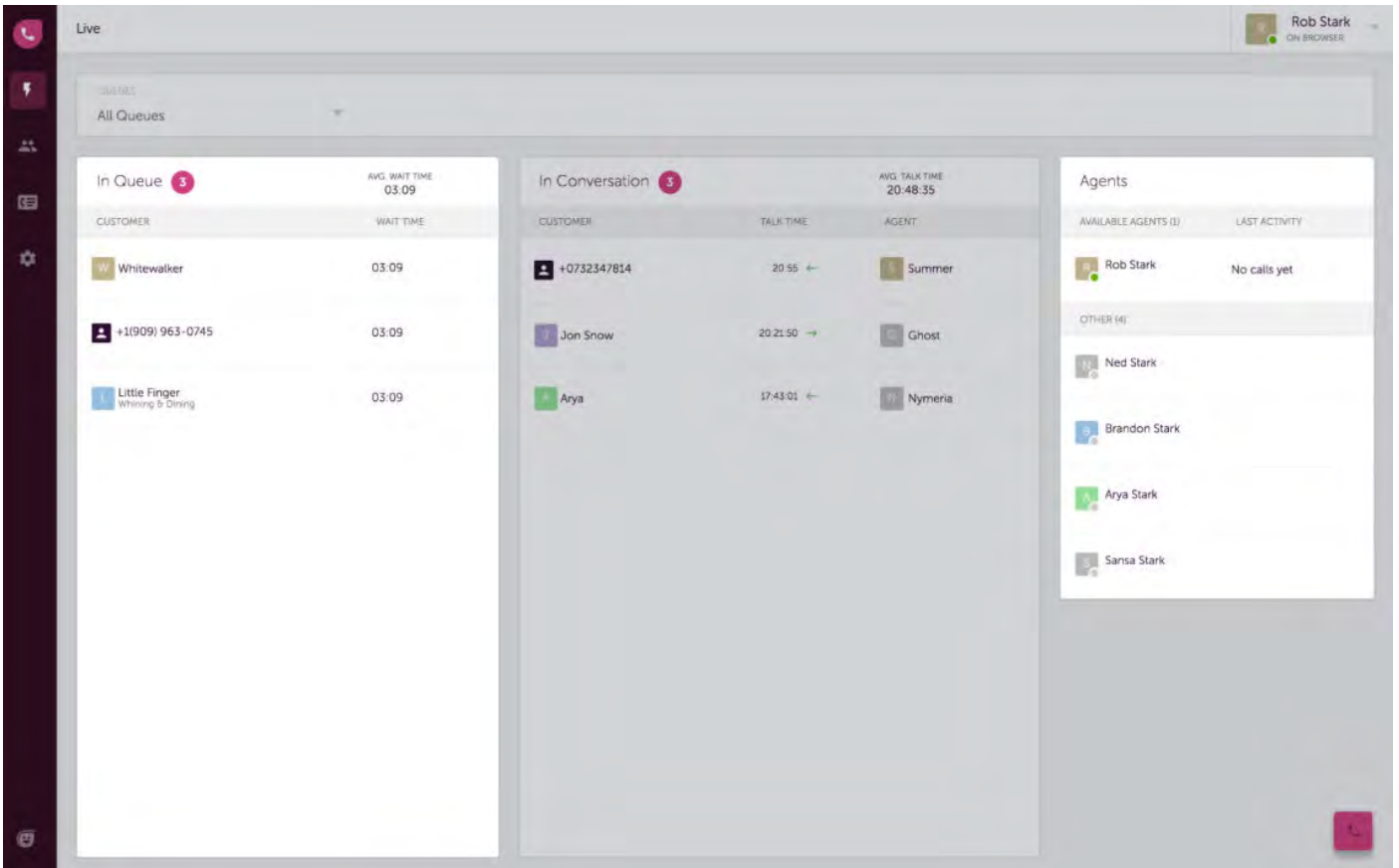
From the same dashboard, agents can view chat support to engage with users who are using your app or browsing your site.
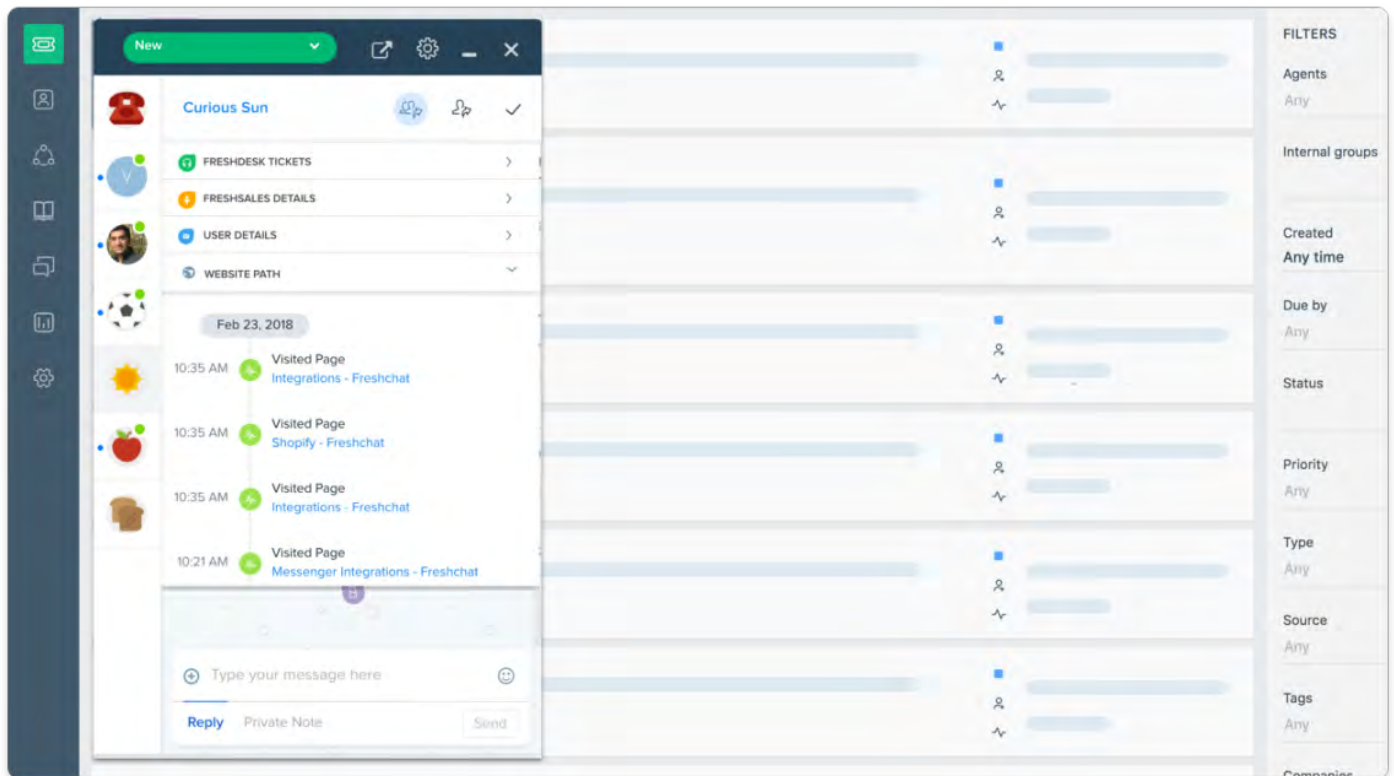
And website support is just a click away, where customers can contact you by filling out a ticket form and submitting it to your team. You can even connect forms to your knowledge base so that relevant content shows up on the right-hand side of the form, and help customers with answers to their problems.

Social media support is available from the same location as every other channel. You can integrate your brand's Facebook page with your Freshdesk helpdesk, making it easier for support agents to respond to posts on your page.

Integrating Twitter support is just as easy. Once you've done this, you can convert and address important tweets as soon as you receive them.

All of these omnichannel support features ensure that your customers can get the help they deserve, no matter which channel they decide to contact you on. They also ensure that your agents will never have to waste time switching between multiple windows or logging into multiple accounts to provide fast and helpful service.

Conclusion

Even if you think that your company offers top-notch support, most of your customers would probably disagree. Unless you're offering proactive support, that is. Unlike traditional reactive support that involves waiting for customers to reach out for help first, proactive support helps businesses predict and solve support problems before they arise.

Besides pleasing customers, proactive support can also help brands save money on inbound contacts, save money on operational costs, and increase overall customer retention. To get started creating a proactive approach to your brand's customer support strategy, begin by identifying recurring support issues and telling customers as soon as you make a mistake.

You should also start thinking proactively about customer loyalty or purchasing recommendations. Use a helpdesk that can meet all of your proactive support needs to implement this strategy, like Freshdesk does.

With our proactive helpdesk, you can offer self-service materials to customers to solve problems on their own time or gather valuable feedback that can help you make improvements. You can also monitor social media mentions, indirect tweets directed at your brand, and important keywords so that no social post that needs your attention will go unnoticed.

Add live chat to your site with our chat integration to start offering customers proactive chat when they interact with your company. That way, you'll be there for them before they decide to reach out.

Allow your team to organize tickets and collaborate on issues together by splitting up and assigning tasks with our software. This tactic can help you proactively curb high ticket volumes or issues that may be difficult for some agents to solve.

And our omnichannel support options ensure that you and your team will always be ready for support queries, no matter the channel.

The bottom line? If you want to go proactive, go with Freshdesk.
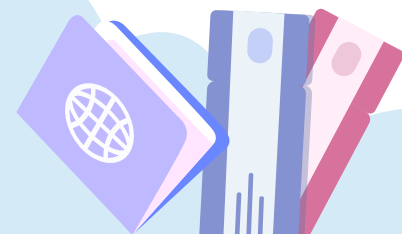
Contributors

Author

Michelle Barre wants to be many things. She's a serial nachos eater. She frequently writes for the **Freshdesk blog.**

Editor

Monica Maria is a product marketer and **content** strategist at Freshworks Inc. She enjoys doodling and is known to dabble in photography. She is often guilty of tsundoku.

Illustrator

Vinodhkumar Neelakandan is a senior visual designer at Freshworks Inc. He loves creating compelling designs with a keen eye on user experience. In his spare time, he enjoys playing video games and watching movies.

Looking for a helpdesk software that's a right fit for your business?

freshdesk

by freshworks