

KUSTOMER GUIDE

# Leveraging Proactive Support to Build Brand Loyalty & Business Value

7 Steps to Implementing Proactive Support Within Your Organization

 Kustomer



Hi Jakel I can see that your sneakers are on their way, but there might be a delay due to the storm.

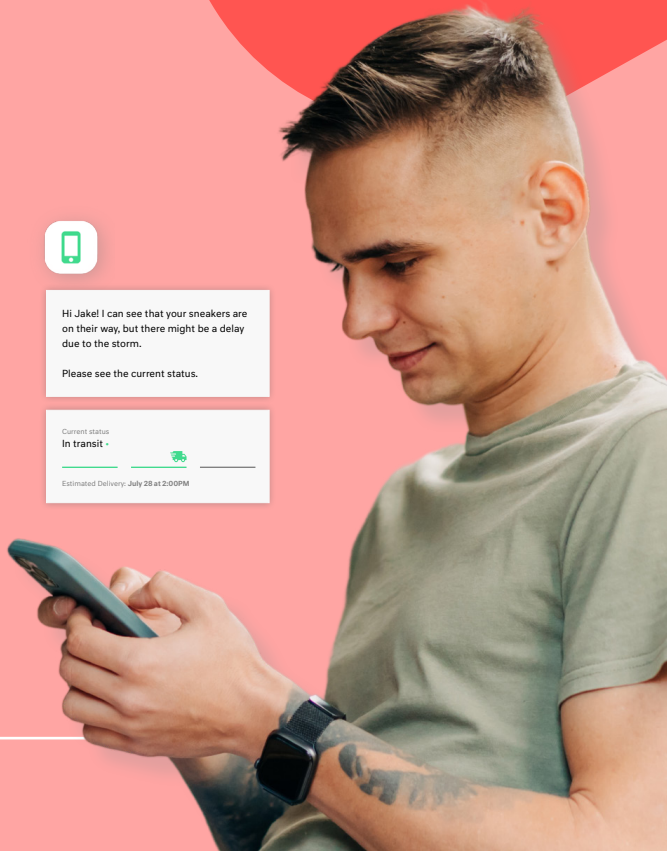
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Estimated Delivery: July 28 at 2:00PM



**Over the course of history, the typical support interaction has involved a customer reaching out to a business, typically by phone, and waiting in a support queue in the event of something going wrong.**

The reasons for reaching out could be a variety of things, including defective products, shipping delays, or needing more information to complete assembly. The not-so-distant advent of smartphones, social media, and all things information has disrupted nearly every industry. And customer support is no different – the preferred channels and methods in which modern consumers now engage customer support are similarly shifting to focus around

mobile technology and more instantaneous messaging-based channels.

Being able to manage support inquiries is no longer the baseline expectation from consumers. In a post-pandemic world, plagued by inflation and delays, reactive support is no longer the only form of support that consumers expect. In [recent research](#), CX organizations identified proactively resolving customer issues (70%) as a top priority after reducing wait times (81%) and consistency across channels and touchpoints (70%). Brands must also be able to anticipate customer needs in advance and harness proactivity in order to turn their support functions into a differentiator among the competition. When done correctly, brands that can master the right mix of technology and agent skill set, will be able to blur the lines between marketing, sales and support to leverage proactive support as another revenue driver for their business.

**In a post-pandemic world, plagued by inflation and delays, reactive support is no longer the only form of support that consumers expect.**

**In this guide, we'll:**

**1**

**Define proactive support and differentiate it from reactive support.**

**2**

**Provide seven steps for your organization to implement proactive support.**

**3**

**List the potential benefits of proactive support for your business.**

# What Is Proactive Support?

Proactive support is a company's strategy used to anticipate the likely concerns of their customers. It is an attempt to meet customers' needs prior to them reaching out themselves. With the right tools in place, your organization might be even able to do so before they realize they have an issue.

At its simplest form, proactive support might communicate shipping delays or product inventory issues in advance of the customer knowing. More nuanced examples could include sharing relevant product updates based on a customer's previous experiences with your brand.



How can you know what your customers need before they do to deliver high-quality, proactive support?



Brad Birnbaum, Kustomer founder [says the answer](#) is:

“A combination of predictive analytics and human insights. You need to be able to identify issues or opportunities by drawing conclusions from data, and by having an engaged team of agents that know everything about your customers and are always looking out for new ways to delight them. But no matter how good your agents are, if you don't have the data and single customer view that will enable them to understand everything about your customers, it's very difficult to be proactive.”

# Proactive vs Reactive Support

Proactive Support 	Reactive Support 
<b>Solves for a need, e.g. faster delivery to avoid a forecasted storm</b>	<b>Solves for a want, e.g. a refund for an unsatisfactory experience</b>
<b>Solutions to problems that haven't yet occurred</b>	<b>Reaction to problems that have already transpired</b>
<b>Brand initiates first contact</b>	<b>Customer initiates first contact</b>
<b>Allows agents to focus on relationship building and delivering value</b>	<b>Burdens agents with low-level, repetitive inquiries</b>

# 7 Steps to Implement Proactive Support

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- 1 **Collect Customer Feedback & Identify Common Issues**
- 2 **Have Robust Self-Service Tools in Place for Customers**
- 3 **Provide Agents with Technology That Enables Proactive Support**
- 4 **Leverage Appropriate Communication Channels**
- 5 **Rectify Issues Before They Happen**
- 6 **Nurture Customers With Value-Add Content**
- 7 **Illuminate Opportunities for Upselling**

## Support-Focused Steps: Step 1

### Collect Customer Feedback & Identify Common Issues

In order to anticipate your customer's likely issues and needs, and enact proactive support, you first need a way to capture how your customers are feeling. This requires several different things. You should be measuring sentiment within customer communications and on social media using surveys that capture metrics like customer satisfaction (CSAT), net promoter score (NPS) and customer effort score (CES). You should also be tracking behavior across every channel of interaction. This will allow you to identify recurring issues and gaps in your CX strategy by asking customers and monitoring interactions directly.

This should be an ongoing process that your organization iterates on, to continuously form the foundation for proactive support. For example, once you've identified common inquiries and problems, your brand can develop automated messages and knowledge base articles to preempt customer needs and help free up agents' support queues.



## Step 2

# Have Robust Self-Service Tools in Place for Customers

Once you have evaluated customer feedback and analyzed sentiment data, your next step in implementing proactive support should be creating a wealth of self-service tools that allow customers to solve issues on their own with no agent involvement. As a caveat, note that self-service tools are proactive in the sense that they are engineered to answer common questions without burdening an agent, but are not actually actively solving a customer's unique problem before it occurs.

Research indicates 67% of consumers prefer self-service over talking to a company representative and 91% of consumers would use an online knowledge base if it were available and tailored to their needs.

Self-service tools provide customers with the ability to help themselves without having to connect to a human team member. [Research](#) indicates 67% of consumers prefer self-service over talking to a company representative and 91% of consumers would use an online knowledge base if it were available and tailored to their needs.

Additional examples of self-service tools beyond knowledge base articles include: chatbots, website downloads, FAQ web pages, online forums/communities and AI search functions. When creating self-service options, keep in mind the repetitive questions that can be answered automatically from the insights derived in step one. The ability to resolve issues on their own yields a feeling of positive empowerment when it comes to customer sentiment and your brand. Furthermore, self-service tools also lower support costs, eliminate repetitive conversations and reduce resolution time.



## Step 3

# Provide Agents with Technology That Enables Proactive Support

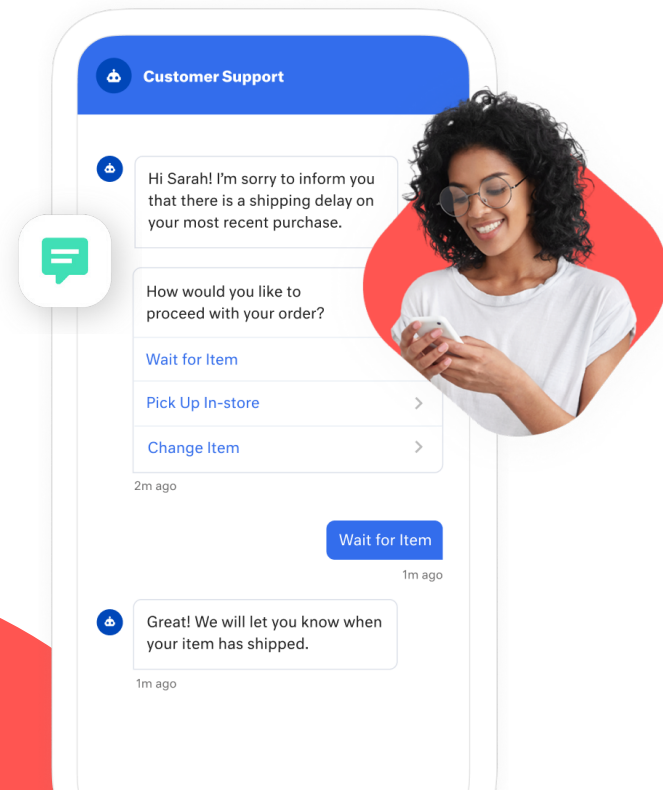
Similar to providing customers with self-service tools to solve their own issues, you need to provide your internal team with the right technology to help them be strategically proactive. The first essential piece is having a place to store the foundational data that gives you a complete understanding of your customer in one place, which will likely be a customer service **CRM**. The important things to look for in a CRM are security and usability, because the data has to be stored in a secure, central location that is still accessible. The right CRM will allow you to combine human insight with powerful analytics.

It will provide reporting and a record of every customer's history, from which you can then equip your CX team with everything they need to know about your customers.

To be truly proactive requires a lot of moving parts to come together – mainly the combination of trained employees and features within your software platform – to connect with customers over their preferred channel, with the right personalized message, at the right time. To do this, having AI and automation in place will be essential to free up your CX team's time. Leveraging automation

to reduce the time spent on low-level, repetitive queries will allow them to then spend more time strategically identifying customers by their last order, their location and more, which will enable them to proactively surprise and delight customers more effectively.

## Connect with customers over their preferred channel, with the right personalized message, at the right time.



## Step 4

# Leverage Appropriate Communication Channels



Earlier in the guide, we've discussed how self-service tools can function as a means of proactive support. Those tools, despite the fact that they should be routinely updated, are still static to a certain degree as they are engineered to answer repetitive questions. Messaging, however, is a channel that allows brands the chance to move beyond antiquated ways of doing business to get and stay close to consumers at every step in the journey.

Today's consumers expect a high level of customer support, including proactive support, and they expect it on multiple channels.

Kustomer [research](#) found that CX professionals believe live chat (79%), social messaging (72%) and SMS (56%) will become more popular channels in the next three years. It's clear that customers now expect efficient, personalized support, which is why support leaders are turning to conversational, chat-based channels to help them strike that balance and offer proactive support at scale.

Via messaging, companies can instantly update customers and customers can similarly follow up for clarification. In terms of proactive updates, this can be used for things like sharing shipment updates, back-in-stock alerts and

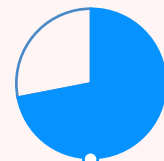
bespoke offers. Email inboxes are already inundated with offers and from unpersonalized blast campaigns. Messaging technology, however, continues to improve thanks to greater personalization, more human-sounding chatbots, and AI improving at unstructured conversations (i.e. those that go beyond the confines of a pre-programmed script).

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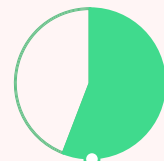
**Customer research found that CX professionals believe live chat, social messaging, and SMS will become more popular channels in the next three years.**



Live Chat  
79%



Social Messaging  
72%



SMS  
56%

## Step 5

# Rectify Issues Before They Happen

The previous steps leading up to this center around being able to connect with customers over their preferred channel, with the right personalized message, at the right time. While that is indeed the “holy grail” of proactive support, the final step in our support-focused steps revolves around mitigating issues before they happen.

We’ve saved it for last, as it’s not just important for your CX team, but a mindset that should be shared across all functions of your entire organization.

For example, marketing or IT might own crucial information about your website downtime while your operations team could have vital information impacting your supply chain. In order for CX to proactively

communicate issues and find solutions for your customers, there must be an adherence to a proactive mindset throughout your organization that places the customer first. This is essential in retaining their loyalty in the event that something goes wrong.

Delays in receiving presents on time during the holiday season could mean a lost customer for life, so having a pulse on all of the impacting factors when things go wrong is essential to address things proactively. A solution might involve sending important alerts that may affect deliveries, such as adverse weather conditions or local events that may lead to increased traffic or delays.

# Upsell-Focused Steps

Now that we’ve covered the support-focused steps, we can turn our attention to – what we’re calling for the purpose of this guide – our upsell-focused steps. These are the ones that blur the lines between marketing, sales and support due to their role in turning your CX department into a revenue generator for your business.





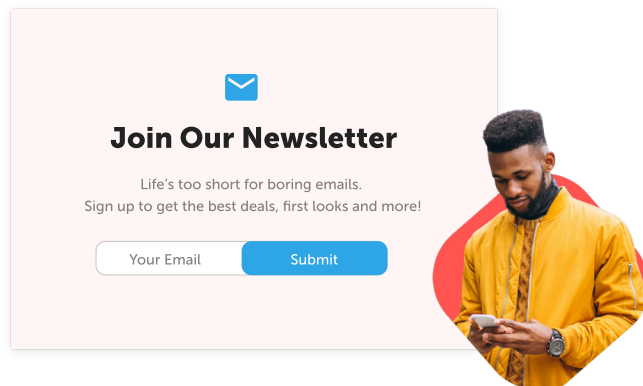
## Step 6

# Nurture Customers With Value-Add Content

This step centers around nurturing existing customers with value-add information, which could take various forms. It could be suggestions or recommendations based on their previous purchase history, or enriching information like newsletters, feature updates and lifestyle content. Your organization's CX function won't likely be the ones producing this content, but given their proximity to the customers – they should have a hand in helping steer where it lands.

Providing your customers with this information allows your brand to position itself as a helpful steward that can navigate your product offerings in a way that's personalized to each customer. Proactively serving your

customers with relevant nurture content in a strategic way based on the identifying information in your CRM, like their last order or their location, will allow you to share it effectively.

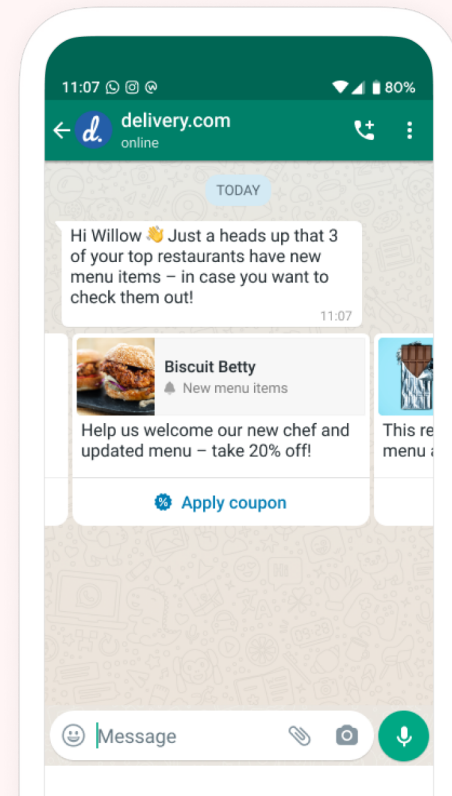


## Step 7

# Illuminate Opportunities for Upselling

Proactive outreach via chat-based channels can unlock business growth and upsell opportunities for your business. For example, an on-demand delivery service for local restaurants and stores, could send a proactive message to a customer about a few of their favorite restaurants, alerting her of new menu options to try. With the right tools, this kind of engagement can be both completely personalized and completely automated.

Your brand is more likely to increase its chances of securing an upsell opportunity when it provides these personalized recommendations on a channel that consumers prefer. Similarly, the organizations that are taking actions like the ones mentioned above to meet customers along every step of the customer journey are the ones that will be able to drive business wins from proactive outreach.



# Benefits of Proactive Support

If your organization hasn't yet implemented proactive support, we've compiled some of the benefits below that will hopefully provide ample motivation to do so. Here are some of the ways your business can benefit from proactive support:

## Increases CSAT

Customer research indicates 81% of consumers appreciate proactive support and 77% of consumers like when businesses communicate with them in a proactive and personalized manner. Since naturally customers don't always expect companies to be upfront about issues, when companies do surprise them by admitting to issues early and informing them that they are doing their best

to resolve them, it surely leads to increased customer satisfaction and happier customers.



**81% of consumers appreciate proactive support**



**77% of consumers like when businesses communicate with them in a proactive and personalized manner**

## Reduces Inbound Support Inquiries

With the right proactive support approach, you can significantly reduce the number of queries that reach your support team's queue. When most of your customers' queries are resolved proactively, whether via self-service options or proactive outreach, it frees up your support team to focus on your most significant queries. Agents will have more time for your most important customers and be able to deliver a truly personalized experience.

## Instills Brand Loyalty

Businesses that adopt a proactive approach are more likely to create happy customers that advocate your brand. Even further, they might refer their friends, family and colleagues to your business as well based on their experience. Anticipating customer needs will allow your brand to build with exponential loyalty.

## More Scalable

Most companies exist with the aim to grow their customer base. Based on current labor and market conditions, your team might be strapped for resources, so the ability to offer customer support while scaling is crucial. Bolstered by self-service and automation, proactive support will help your support team's workload. from one to five.

## Drives Revenue

Proactive support helps you transform the support function within your organization, so you can reduce the time spent on repetitive inbound queries and instead strategically create more opportunities for upselling and revenue generation.

# How Kustomer Can Help You Prioritize Proactive Support

When you have all of your customer information in one system, like the Kustomer CRM, across all of your platforms, you can create the kind of granular searches for customers that account for specific behaviors or qualities. You can identify customers by when they made their last order, their location, their sentiment, and more — making it far easier to surprise and delight them with proactive support.

Kustomer is designed to help your customer service team meet the wants and needs of consumers, all while getting ahead of their common queries and concerns.

**Instead of waiting for a customer to ping you, agents can send instant messages to target audiences based on various factors, such as:**

- ✓ **Time spent on the page.**
- ✓ **Last page visited.**
- ✓ **Geographical locations.**
- ✓ **Attributes based on log-in information.**

Are you looking to make the transition to proactive customer service? Learn more about what Kustomer has to offer by [requesting a demo today](#).

## About Kustomer

Kustomer – now a part of Meta – helps businesses grow by delivering exceptional customer service via phone, email, chat, text, social, messaging and more. Kustomer enables fast, personalized, and efficient customer and agent experiences using complete customer visibility, seamless omnichannel conversations, intelligent automation and easy, no-code customization to adapt to change. See why growing brands like Hopper, Ring, Glossier, Stella&Dot, Rappi, Sweetgreen, and others use Kustomer to build the enduring customer relationships that drive better business results. To learn how Kustomer can help you deliver an efficient and effective service strategy, visit [Kustomer.com/Demo](https://kustomer.com/Demo).

