

# Managing Customer Emails

***10 Telltale Signs You Have Outgrown Microsoft® Outlook®***



It's hard not to offer an email customer service option if you have a website. It's like a brick-and-mortar business not providing a phone number for customer service! If you feature an email address on your website, customers will find and use it. Is your business set up to handle email inquiries promptly and effectively?

## Outlook is a great email client, but...

Many businesses start out with an email client like Outlook to manage customer emails. As a personal email client, Microsoft Outlook helps you manage your emails effectively and increase your productivity. However, when it comes to handling growing volumes of customer email inquiries, Outlook fails to scale. Outlook is designed for individual use, not for providing efficient, mission-critical customer service. It does not treat emails as part of a larger case that needs to be tracked and managed to closure, it has no understanding of service levels, and it does not treat emails as valuable conversations with customers. An **email response management system (ERMS)** is a logical next step in the evolution of customer email management in growing businesses.

The move from Outlook to ERMS mirrors the move in phone systems from private branch exchange (PBX) to automatic call distributor (ACD). The ACD industry emerged when the phone became a preferred interaction medium between businesses and their customers. As call volume surged, businesses outgrew PBX systems for handling customer calls. They switched to ACDs, which unlike PBX systems are built to enable businesses to handle large volumes of customer phone calls carefully and consistently. Just as the ACD is the main building block of a call center, an ERMS is a key component of successful web-enabled contact centers.

## Does your organization need an email response management system?

Organizations that use Outlook to handle customer emails face some typical challenges when their email volumes begin to grow. Below are 10 telltale signs that customer service managers can easily spot. If you have noticed any of these signs in your business, consider switching to an ERMS for managing customer emails. With the right ERMS, you will be able to reduce your service costs, increase the productivity of your contact center agents, improve service quality, and enhance sales.

### **1. You get more than 1000 emails per month from your customers.**

Volume is the leading indicator of the need for change from an Outlook-based email response solution to an ERMS. As volumes grow, service teams usually have to add more agents to the team. As a result, coordination and tracking become increasingly difficult without the right tools.

As a rule of thumb, if your business is getting about 50 customer emails per day, and the volume is growing, you should begin to explore ERMS options. Otherwise you may be unprepared when the volume becomes unmanageable in the Outlook environment. 100 emails per day or about 2000 emails per month is the tipping point where an investment in ERMS more than pays for itself in a year or less.

### **2. You cannot find a customer email from six months ago.**

Outlook is great for small working sets of emails, but storing and searching large numbers of emails is not an Outlook strength. As a user, you may be set up to delete older emails every couple of months unless they are filed in specific folders. But your customers have long memories, and they will likely follow up on communication that you deleted as part of your last Outlook inbox clean up.

As consumers, we know how valued we feel when we call or email a company and they remember our past interactions. When we do not offer the same quality of service to our customers, we risk losing them. Most ERMS systems will allow you to maintain complete interaction history for each customer, as well as associate related emails as a single case.

### **3. You spend an hour every day categorizing and routing emails to agents with different skills.**

One of the most common early signs of outgrowing Outlook is that service managers spend large amounts of time every day sorting through customer

emails, categorizing them, and allocating email work to their team of agents. This process tends to be slow, error prone, and expensive for the organization.

An ERMS will help you streamline and automate the process of categorizing and routing customer email. After moving from Outlook to an EMRS, a leading retail organization could reduce the number of people routing and allocating email work from eight employees to only one!

#### **4. One of your service agents calls in sick. There are customer emails stuck in her inbox.**

As a customer service manager, you dread the days when an agent calls in sick. You have no idea how to handle the customer emails that are locked in the agent's inbox. Even if you override the password and forward unanswered emails to another agent, you cannot identify related emails that should be forwarded as well to enable the agent to create proper responses.

#### **5. A livid customer is on the phone. You forwarded her support request to your engineering team, but no one ever followed up.**

Or, maybe, your best customer is on the phone, complaining. She sent you an email that you handed to one of your agents, who forgot to handle the inquiry because something more urgent came up.

Do customer queries fall through the cracks fairly often? Even if you have the best intentions for customer service, if you fail to respond to a customer's service request, you communicate that you do not care about them. Dropping the ball happens all too frequently when customer emails are being managed using Outlook. As customer email volume grows, more and more emails are passed around the business, and the lack of alerts and task management becomes debilitating.

Migrating from Outlook to an ERMS, a hospitality company reduced its average response time from 24 hours to one hour with the same number of agents, even as its email volume grew by 20%!

#### **6. Agents are constantly responding to the same set of email inquiries.**

The 80/20 rule is very evident in customer email handling—80% of the queries will be about 20% of the issues. As a customer service manager, you do not need to worry too much about efficiency when customer email volume is low. But as the email volume grows, your agents complain about the pain of composing similar replies or constantly cutting and pasting from stored responses, while customers complain about getting varied responses to the same query from different agents.

An ERMS includes a common knowledge base for all your agents to store frequently used responses. Agents simply insert the right knowledge base article into their responses. An outsourced contact center company saw its email agents respond to 250% more emails per day when they switched from Outlook to an ERMS.

Not only does the knowledge base increase agent productivity and ensure consistency in responses, it is the key to a whole range of possible efficiencies. An ERMS, using its categorization capabilities, can create auto-replies and auto-suggestions from knowledge base articles. Advanced ERMS will even allow you to publish parts of your knowledge base on your website as frequently asked questions.

### **7. Agents spend a large amount of time looking for the information they need to answer queries.**

To effectively resolve a query, an agent usually needs access to the customer's account and interaction history, information about the company's products and policies, and related information such as shipping status. This information is typically found in a range of back-office systems, in the minds of subject matter experts, and external systems such as the UPS or FedEx website. Outlook is not designed to make access to this information easy for agents as they reply to emails, but an ERMS is. An ERMS includes specialized workspaces for agents with quick single-button access to key information. More information is more power, and the right tools can help agents get all the information they need and present it to maximum effect.

In fact, ERMS providers are increasingly moving towards thin, web-based applications that can be used from anywhere, anytime. Agents can log in to a browser-based email response application from home and take care of customer emails while sitting in their pajamas! The ability to work from home or while traveling is a powerful advantage. By giving agents increased flexibility while ensuring quality and productivity, businesses can tap into cost-effective talent pools that would not otherwise be available to them.

### **8. You want to handle spikes in email traffic by getting temporary help, but the administrative overhead kills you.**

Business have spikes; some have more spikes than others. If you have a retail business, you have to be prepared to deal with the holiday season and the resulting increase in inquiry and service requests. Marketing campaigns, too, cause a flurry of inquiries. Most small and medium-sized businesses have developed good models for handling phone-based customer inquiry spikes, but they are unprepared to handle customer email spikes.

The capabilities of a personal email program such as Outlook do not lend themselves to coordinating and distributing work across a team of

individuals. If the team needs to scale on short notice with temporary agents, the problem quickly becomes overwhelming for the supervisor. New agents must be trained, and their responses to be audited or reviewed. The trade-off between scale and quality becomes stark without the right ERMS capability.

**9. You spend hours sorting customer emails in order to create weekly trend reports.**

The simplest reports are a nightmare for service managers who use Outlook for managing customer emails. They have no choice but to physically count customer emails to create Excel reports. While this manual process works for a small number of customer emails, the overhead becomes unacceptable as the volume of customer emails grows. Moreover, as customers use the email channel for service, they also provide additional feedback through their interactions that can be mined using ERMS capabilities. Outlook fails to extract the valuable information that can be gleaned from incoming emails and fed back to the marketing and product teams.

**10. Your boss keeps pushing for better service level compliance, but you have no way to measure service levels.**

Problems with value-based service and meeting service level agreements (SLAs) become more acute with email. Often, your best customers don't have the time to hold on the phone, and prefer to use email and the Web to communicate with your business. As your company president wants to provide the best service level to these customers, your boss asks for SLA reports based on customer type.

When you are using Outlook, you cannot even measure SLA, much less enforce it. Outlook lacks the capabilities to report and track customer service. When SLA compliance becomes a significant key performance indicator for your job success, insist on moving from Outlook to an ERMS. Moving from an Outlook-based solution to an ERMS system led to one eService team receiving the president's "Outstanding Customer Advocacy" annual award at a retail business.

## About eGain

eGain (OTC: EGAN.OB) is a provider of customer service and contact center software and services, trusted by world-class companies to achieve and sustain customer service excellence for over a decade. **eGain Service™ 7**, the company's software suite, available licensed or on-demand, includes integrated applications for customer email management, knowledge management, web self-service, live web collaboration through chat and cobrowsing, automation of fax and paper-based service interactions, case management, and service fulfillment. These robust applications are built on the eGain Service Management Platform™ (eGain SMP™), designed to be a scalable next-generation framework that includes end-to-end service process management, multichannel, multisite contact center management, a flexible integration approach, and certified out-of-the-box integrations with leading call center, content, and business systems.

Headquartered in Mountain View, California, eGain has an operating presence in 18 countries and serves over 800 enterprise customers worldwide. To find out more about eGain, visit [eGain.com](http://eGain.com) or call our offices—United States: 800-821-4358; London: 1753-464646; Tokyo: 3-5778-7590.

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