Customer service messaging handbook.

Best practices and strategies for messaging in the modern age.

NUANCE

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Meeting customer expectations with messaging

The way we engage with customers is evolving.
In recent years there's been a convergence of business and personal communications as consumers look for new ways to interact with brands. Tired of lengthy periods spent on hold and slow responses from customer service, they're looking for simple, conversational experiences that prioritize convenience and speed—and messaging meets those needs.

Messaging is a more dynamic way of connecting with your customers, blending notifications and two-way interactions with real-time and asynchronous engagements, to deliver flexible communication and service on their terms.

If you want to take advantage of this shift in consumer expectation, you need to be prepared to meet your customers wherever and whenever they want to communicate with you. That means utilizing messaging as an integral pillar in your wider customer engagement strategy.

In this guide, we'll explore the top messaging channels, outline key design considerations for each and look to the future of messaging to see what it might hold.

With practical checklists included, you'll be armed with the tools to ensure you're using the right messaging channels and delivering a consistent experience across all of them.

90%

90% of consumers waste a full day on hold every year[1]

26%

26% look for other ways to contact businesses, to avoid being kept on hold[2]

⚠ Messaging in the modern age

US mobile messaging app users will reach **149.8 million in 2018**, with that figure growing to 171.3 million by 2022[3]

18 million text messages sent are sent every minute[4]

Over **35% of phone users** in the world are best reached by SMS text messaging[5]

90% vs. 20% – Open rate of SMS compared to email open rates[6]

More than **50%** of customers prefer contacting support through text messaging compared to other channels[7]

65 billion WhatsApp messages are sent every day[8]

1.3 billion monthly users of Facebook Messenger, as of September 2017[9]

1, 2. 2018 Nuance Customer Service Trends Report
3. Chadha, Rahul. Messaging Apps and Marketing 2018. eMarketer. September 19, 2018.
4. Media usage in an internet minute as of March 2019. Statista.com.
5. Ericsson Mobility Report. June 2019.
6. SMS vs Email and Apps: Customer engagement infographic. VoiceSage. June 2018.
7. Whittenly, Hannah. 4 Stats to Prove Your Small Business Needs SMS in Your Marketing Game Plan. SmallBizDaily. June 20, 2018.
8. Al-Heeti, Abrar. WhatsApp: 65B messages sent each day, and more than 2B minutes of calls. CNET. May 1, 2018.
9. Shinal, John. Facebook Messenger is now about as popular as WhatsApp. CNBC. September 17, 2017.

Messaging 101

Consumer messaging is spiraling—and when you're coming at it from a business perspective, it can be difficult to identify exactly which channels suit messaging. Another challenge enterprises are facing is the fact that, except for branded apps, none of these channels allow enterprises to direct incoming traffic. Consumers can send a message whenever they want, and brands must ensure that the inquiry is taken care of in a timely manner.

We've outlined four of the most common and effective channel categories, with some of their key features highlighted.

50%+

50%+ of customers prefer contacting support through text messaging compared to other channels[10]

SMS

The first SMS text message was sent well over 25 years ago, and since then it's become ubiquitous. It's now native on almost every phone—and certainly every smartphone—which means it has one of the widest reaches among the messaging channels.

Because it's text-based, SMS is ideal for a communications strategy that blends live and virtual support, so you can use your contact center agents or a virtual assistant to interact with your customers. It sees a far higher response rate than many other channels.

OS messaging

Messaging through a device's native operating system (OS) is the next generation of text messaging.

The main example of this currently is Apple Business Chat. It offers seamless integration for customer service messaging into iOS devices through iMessage.

Later in the kit, we'll explore the future of SMS: rich communication services. It's set to massively expand the kinds of media and messages you can share.

Both enable richer communications, including pictures, suggested answers, automatic calendar appointments, personalized maps and list pickers.

Branded apps

With limited real estate on their devices, we see a trend in which consumers now prioritize their most important apps and delete any extra apps that aren't offering them enough value. If you want to communicate using an app, be sure it's not just another version of your website in downloadable form—it needs to have extra features that only this platform can provide.

Messaging apps

In the past, dedicated third-party apps have been the domain of family and friends, but increasingly we're seeing customers reach out to the companies they are doing business with using these platforms.

If they're popular among your customer base or target demographics, you may want to consider channels such as Facebook Messenger, WhatsApp, Twitter Direct Messages and others.

10. Whittenly, Hannah. 4 Stats to Prove Your Small Business Needs SMS in Your Marketing Game Plan. SmallBizDaily. June 20, 2018.

Synchronous vs. asynchronous

Historically, customer service has been handled as a real-time interaction due to necessity. Your customer calls, your agent answers and they have a conversation. Or, your customer logs into a chat session, then your agent or chatbot responds and they have a conversation. Once the customer hangs up or closes the chat window, the engagement is over.

However, as the industry adopts more channels that are asynchronous in nature—allowing the user to come back at any later time—there's a new opportunity to make customer experiences far easier and more convenient—for both parties. Texts don't have to be responded to instantly (though the agents should respond in real-time whenever possible), messaging apps keep conversation histories stored and, crucially, your customers can leave and come back to an interaction whenever they need to, later and without losing historic context.

That doesn't mean you should abandon synchronous messaging, though. In some circumstances, effective real-time support will be exactly what your customer is looking for. Therefore, messaging works best when synchronous and asynchronous engagements are handled interchangeably, whichever makes the most sense in the specific moment.

Understanding the language of customer service messaging

Synchronous vs. asynchronous
In synchronous interactions, the back-and-forth is instant and happens in real time (such as over the phone). Asynchronous interactions can have gaps between responses without the engagement ending.

Proactive vs. reactive
Proactive messaging is a brand reaching out to its customer, for example to send an important notification or alert; reactive messaging is responding directly to a request from a customer. It's what's traditionally known as outbound and inbound communications.

Virtual vs. live engagement
Depending on the urgency and complexity of the request, consumers can interact with a virtual assistant (also known as chatbot) as well as a live agent using messaging channels.

Predicting the future of messaging

Consumer demands and expectations are always changing—and that means your messaging strategy will need to evolve over time to keep up.

Embracing the future of messaging can give you a real competitive edge when it comes to superior customer experiences. So, what might the future of customer engagement in messaging channels look like?

SMS
SMS messaging has already come a long way since the first text was sent, but it's still improving. Today, AI-driven text can use natural language understanding (NLU) to communicate with customers using more conversational messages.

Customers can text your virtual assistant using their own natural-language patterns, and your assistant can respond in kind—they can type freely and still be understood. That means they won't have to wait for your agents to be available, but if human input is needed, the virtual assistant can transfer the conversation to a colleague in a seamless manner.

With machine learning and AI capabilities, your assistant will become more accurate and confident over time, and it will be able to understand urgency and changes in context, much in the same way a human agent can.

Rich Communication Services
Rich Communication Services (RCS) is one of the newest technologies in messaging. It's designed to expand the capabilities of text, creating a middle ground between SMS and mobile messaging apps. It enables device-agnostic communication by adopting features such as read receipts, group chats, video calls and high-res audio and video sharing.

It can also handle more complex tasks, such as transactions, which can save consumers from downloading a separate app—vital when they're often aiming to consolidate the apps they use.

Crucially, it's open and decentralized, building a new standard that connects mobile carriers and delivers more universal coverage. Google is even offering carriers free access to its RCS gateway to promote adoption for business use cases such as customer support.

Apple Business Chat beta
Apple's new beta Business Chat service allows businesses to connect to customers through Apple devices — which is widely adopted among consumers.

With Apple Business Chat (ABC), the customer is in control of how and when the brand can contact them—the company can't initiate conversations through the channel. Because the interactions come directly from the user's device, they don't need to share personally identifiable information.

ABC is automatically integrated with their Apple device, so consumers can start conversations from Maps, the Safari browser, Search or even from a branded app or website. Transactions are handled by Apple Pay, and features like the calendar APIs mean appointments can be scheduled easily, too.

The best-practice approach to Customer Service Messaging (CSM)

Go asynchronous…
Following the shift towards mobile as one of the primary modes of communication, consumer expectations are now all about immediacy, simplicity and context.[11]

That means your customers are increasingly turning to the asynchronous messaging channels they use in their daily lives to reach you—and you need to be able to respond.

With asynchronous channels, engagements can be spread out over several individual interactions—or even different channels—rather than one continuous conversation. That allows agents to pick up where they left off, and for customers to fit service interactions around their own schedules.
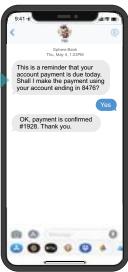
…but don't abandon synchronous
It's all too easy to become too asynchronous—especially when you're dealing with peaks in demand. Ideally, the choice to communicate asynchronously should be made by your customer, so you're dealing with them on their own terms. For as long as the customer is responsive, you should be too.
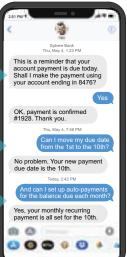
If your customer is expecting an immediate response from you, it's vital you don't leave them waiting. The sooner you can respond, the better—and your CSAT scores will thank you.

If you're looking for guidance on how to design the ways your customers contact you, take your cues from the most popular third-party apps. By emulating the channels consumers know and use frequently, you can take advantage of that familiarity to make communication far easier.

Deliver a consistent experience
Whether you're dealing with real-time or asynchronous conversations, keep the context between individual interactions. You want to ensure both your agents and customers have access to their messaging history, so they have the same information from the start, and no one has to waste time going over old ground.

11. Forrester Research, Apply Immediacy, Simplicity, And Context, March 28, 2016

Send reminders and alerts proactively to assist your customers when they need it
If you have permission to do so, use SMS and your branded app to alert your customers about delays, send them reminders and prevent fraud. And if they have questions about the notification, enable them to answer in the same channel vs. letting them call in.

Reaching out proactively and predicting what the customer might need enhances the customer experience. Alerting your customers in case of an issue or sending them a reminder for an important appointment reduces customer frustration because you are reaching out to them instead of letting them find the issue on their own.

Integrate CSM with your other channels
To keep continuity and consistency throughout your customer experience, your channels need to be integrated. By allowing your customers to move between them freely, you're giving them the opportunity to shape their own service experience and to interact with you in the ways that suit them best.

With the right platform, you can make this whole process far easier on your end, using a unified system to connect your messaging engagements with all your other engagement options, such as IVR or the website.

Optimize communications
Take note of the constraints of each channel you offer and adjust the way you communicate accordingly.

Many of the popular channels—particularly SMS—don't lend themselves to long, complex messages. You risk it getting truncated by the carrier, or simply ignored by your customers if it runs too long.

Your virtual assistant should be able to adjust their answer based on the channel the customer is using, and during agent-led interactions, for example, you can train your people to use short, high-value sentences to get the message across quickly and clearly.

Choose the right use cases
Though there's an ever-growing laundry list of use cases for customer service messaging, it isn't always the most effective way to manage an interaction. Think carefully about which engagements you pursue through your messaging channels, and which ones you transition to other communication methods.

If you're sharing large files, or the issue is especially complicated, you'll need to prioritize other engagement channels. None of your customers want to receive a lengthy PDF over Facebook Messenger and trying to solve a unique service problem over text will be slow and frustrating—for both you and your customer.

Verify your users with secure authentication
When you're not dealing with a customer face-to-face, how do you know you're talking to the right person?

To ensure every interaction you have is secure and verified, you need to use authentication tools to identify exactly who you're dealing with. Just like other engagement channels, you can add voice and behavioral biometrics to some messaging platforms alongside more traditional verification methods.

A quick-look guide to 8 considerations for CSM

1 **Make the shift to asynchronous**
Asynchronous messaging is vital in a consumer environment where everyone expects convenience and context in their customer service interactions.

2 **Synchronous is still your friend**
Often, your customer will still be looking for an immediate interaction, so don't keep them waiting.

3 **Keep it consistent**
Ensure your agents and customers have the full context from previous interactions, so neither is flying blind when they start a new conversation or come back to it at a later time.

4 **Be proactive. Send reminders and alerts proactively to assist your customers when they need it**
Reaching out proactively and predicting what the customer might need enhances the customer experience.

5 **Integrate your messaging**
Your customers will get the best experience—and the highest satisfaction—if they can move freely between your communication channels.

6 **Optimize your communications**
There's limited real estate on a mobile screen—so train your agents (virtual and live) to communicate in short, high-value messages.

7 **Ensure messaging is the optimal channel**
If you're sending large files, or it's a complex request, messaging might not be the most efficient way of communicating.

8 **Be sure who you're talking to**
Use voice and behavioral biometrics to confirm your customers are exactly who they say they are.

Building your strategy: key messaging design considerations

Messaging should be an integral component of your overall communication strategy—but it's also critical that your specific messaging strategy is carefully considered, otherwise you may find yourself investing in new channels that simply don't work for you.

So, here are key questions to ask yourself about your strategy, to help you form your own messaging offering:

Will your channels be available 24/7?
With messaging channels, you can potentially offer 24/7 coverage even if your agents aren't on shift. However, if you don't have a virtual assistant or chatbot to manage responses during that time, your customers will find themselves waiting with no reply.

In these cases, it's often worth sending your customers a friendly and informative hold message, to let them know how long their waiting times are likely to be.

Tip: Use a simple virtual assistant that collects all the important data, like name and reason for the inquiry, upfront. This way, the agent can directly jump into helping the customer.

Are your agents trained to deliver asynchronous experiences?
In traditional real-time communications, agents will begin a conversation with a greeting and end with a sign-off. But in asynchronous interactions, a pause in between individual messages don't necessarily mean the engagement has ended.

So, if your customer picks up an ongoing asynchronous interaction, and your agent greets them as though it's a completely new conversation, it pulls them out of the seamless experience you're trying to deliver.

Tip: Train your agents—and code your chatbots—to be aware of the context in which they're communicating and interact accordingly.

Do you tell customers if they're being switched between agents—or to a virtual assistant?
The same agent won't always be available to pick up an asynchronous interaction when the customer decides to respond. A major consideration for your strategy is how transparent you're going to be when you're transitioning customers between different agents. For some customers, moving from one agent to another may break the experience, even when you've given the new agent all the contextual information they need.

Tip: Similarly, some customers will be happier to deal with virtual assistants than others—so consider giving them an option that makes it easy for them to switch to an agent and be upfront about potential wait times.

Metrics that matter

Your strategy shouldn't be set in stone. Early on, create a set of metrics to monitor the performance of your CSM strategy, and tweak your offering based on the results.

Tip: In addition to your typical metrics that you're tracking for phone and web engagements, implement new ones that reflect the nature of asynchronous engagements. For example, Average Handle Time needs to reflect not only individual engagements, but also conversations happening over time.

Welcome to Customer Service Messaging with Nuance

We help organizations have personalized, seamless and secure interactions with customers, blending live and automated conversations for efficient, effective customer experiences.

Our customer service messaging offering is part of our intelligent engagement platform, so you can deliver an integrated messaging and service offering between all channels, including the phone through our IVR-to-Digital capabilities.

Let your customers connect with you on their terms – without making it hugely more complex for your agents (virtual and live), by helping them handle multiple engagements at once.

30+

30+ top brands are customers

37M+

37+ million interactions handled annually through messaging

The big benefits

- Broaden your customer reach

- Make it simple and satisfying to communicate with your business

- Deliver a strong, consistent brand experience

- Eliminate silos between your channels

- Make interactions faster and frustration-free with easy authentication

- Reduce contact center costs

- Boost CSAT scores

Rich communication with Nuance

We're helping pioneer the future of messaging with our rich capabilities:

A wide range of channels
We support SMS, third-party messengers, branded apps, OS-based messaging and more

Real-time and asynchronous messaging
Our offering is aligned with industry best practices and evolving consumer expectations

Virtual and human assistance
We offer seamless transitions between fully integrated, conversational virtual assistants and contextualized, hands-on human support

Natural language routing
By understanding the intent and urgency within your customer's messages, we can help you prioritize your inbound communications

Targeting
Ensure you're delivering the right experiences to the right customers—at exactly the right time

Built-in biometrics
Using voice and behavioral biometrics, you can authenticate your customers easily and prevent fraud throughout every interaction

IVR-to-messaging
Connect your traditional and digital channels for seamless transitions to assist your customers faster and increase the adoption of digital channels

Proactive and reactive messaging
Reach out to your customers when they need it and empower simple two-way communication through any digital channel

What's next

Learn more about our customer service messaging solutions.

Dig deeper into our offering.

Explore Nuance customer service messaging solutions

What could customer service messaging do for you?

See how customer service messaging can work for you and your customers.

Watch the video

Give your customers their time back.

Learn how consumers want to connect with you.

View the infographic

About Nuance Communications, Inc.
Nuance Enterprise is reinventing the relationship between enterprises and consumers through customer engagement solutions powered by artificial intelligence. We aim to be the market leading provider of intelligent self- and assisted-service solutions delivered to large enterprises around the world. These solutions are differentiated by speech, voice biometrics, virtual assistant, web chat and cognitive technologies; enabling cross-channel customer service for IVR, mobile and web, Inbound and Outbound; and magnified by the design and development skill of a global professional services team. We serve Fortune 2500 companies across the globe with a mix of direct and channel partner selling models.

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