

How can I help?

# CUSTOMER SERVICE CHANNEL CHECKLIST



Customers expect you to meet them on more channels, deliver more personalized service, and have answers to a wider range of issues. Identify any gaps in your service offering using this simple checklist.

## HELP CENTER

Help customers find answers fast.

- Includes knowledge articles or FAQs
- Easy for customers to access and use
- Integrated case management

### Enhance the Experience:

- Live chat or messaging options
- Direct support case creation
- Agent has complete view of customer activity

## CUSTOMER PORTAL

Put data at your customer's fingertips.

- Secure access to account info
- Easy for customers to access and use
- Integrated case management
- Access to business processes

### Enhance the Experience:

- Live chat or messaging options
- AI-powered chatbots
- Agent has complete view of customer activity

## SUPPORT FORUM

Harness the power of community.

- Includes knowledge articles or FAQs
- Links to helpful support blogs
- Easy for customer to access and use
- Integrated case management
- Discussion boards (Q&A, groups)

### Enhance the Experience:

- Live chat or messaging options
- Direct support case creation
- Agent has complete view of customer activity

## MOBILE APP

Embed support in any mobile app.

- Includes knowledge articles or FAQs
- Access to the support forum
- Integrated case management
- Live chat
- Messaging options

### Enhance the Experience:

- AI-powered chatbots
- Agent has complete view of customer activity

## LIVE CHAT

Help customers at their point of need.

- Website
- Customer portal
- In-app experience

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### Enhance the Experience:

- AI-powered chatbots to collect info and seamless handoff to agent
- Agent has complete view of customer activity

## MOBILE MESSAGING

Convenient for customers.

Cost-saving for you.

- Ability to text 1-800#
- Outbound notifications
- Messaging with third-party apps

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### Enhance the Experience:

- AI-powered chatbots
- Agent has complete view of customer activity

## CHATBOTS

Scale support. Provide instant help and collect important information.

- Pre-chat forms
- Answering simple FAQs
- Ability to understand and answer written text

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### Enhance the Experience:

- Use AI to route to the right agents
- Agent has complete view of customer activity

## SOCIAL

Be social! Engage with your customers on their terms.

- Coverage across where your customers are
- Respond to conversations outside of @ mentions
- Connected to CRM

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### Enhance the Experience:

- Use AI to automate case creations and routing
- Agent has complete view of customer activity

### HOW'D YOU DO?

Tally your results to see how customers can find help, when and where they need it.

**2 points** for every check in the blue section

**1 point** for every check in the grey section

31-40 Points = ★★★★★

You've Covered All the Right Channels

15-30 Points = ★★★

You've Got This

< 15 Points = ★

On Your Way

Enter your score here

Looking to up your game with customer service channels?

Check out this helpful guide to digitally optimize your customer support:

<https://digitalserviceplaybook.salesforce.com/>