Customer service goals

How to achieve them in 2022 **+ SMART examples**

Customer service goals are targets that can inspire, engage, and motivate your customer service team.

Working together to achieve a common goal — it's a noble cause, but how exactly do you accomplish it? Your customer service goals can be a source of inspiration for your entire team — if you set them up for success.

But when it comes to setting objectives (and key results) for your customer service team, where do you start? How should your team go about achieving these goals? What sort of metrics should you use? Customer service goals are a great way to measure success and motivate your team, but only if they are smart, defined, and achievable.

Here, we'll look at the importance of setting measurable customer service goals, examples of SMART goals, metrics to processes, and everything in between.

Why setting customer service goals is important

Customer service teams are responsible for keeping customers happy and driving revenue. With these two high-stakes responsibilities come certain performance expectations — which is where setting customer service goals comes in.

It's an opportunity for leadership and managers to set expectations and priorities for their teams to follow. This keeps teams accountable and engaged with their work, motivating them to achieve both individual and team-based objectives.

Franklin Covey, a world leader in consulting and training, says, "Begin with the end in mind." In fact, it's an entire chapter in his popular book "7 Habits of Highly Effective People." **If you don't know where you're going, you're guaranteed to get nowhere.**

Setting customer service goals helps you:

- **Align with your team on expectations.** When a team is working together toward mutual goals, everyone can support each other. Knowing the end goal helps agents understand what's going to drive results.

- **Measure and manage agents' performance.** Knowing which goals agents need to work on helps guide their individual tasks. It also lets them know what's most important to the company and helps leaders keep track of what's working and what needs improvement.

- **Motivate your agents.** Humans as a whole thrive off of motivations. Whether it's money, fame, or praise, each of us is driven by our inherent needs. Give your team a 'star' to reach for to provide an innate feeling of accomplishment, thus providing motivation.

How to approach customer service goal setting

Getting your agents to identify and stick to their goals is a challenge in itself.

Here are a few ways to approach customer service goal setting with your team.

Define how customer service quality is measured

Choosing metrics and KPIs to measure your support team's performance and creating customer service quality assurance guidelines will give you and your team direction. Without knowing what goals you're working towards, you cannot determine if the quality is improving or not.

For example, if your company goal is to increase productivity by 10%, your team can contribute by increasing your First Contact Resolution (FCR) rate by 5%.

Be SMART

Use customer service SMART goals to create clear, achievable objectives. SMART stands for:

- **Specific** — Goals should be clear and well-defined. Vague or generalized goals are unhelpful because they don't provide sufficient direction.

- **Measurable** — Goals need concrete criteria for measurement and progress tracking. Without measurement, you run the risk of achieving a goal that you didn't really want in the first place.

- **Attainable** — For a goal to be motivating, it has to represent an objective towards which you're both willing and able to work. Achievable goals can be reached by your team with the right amount of planning, motivation and dedication.

- **Realistic** — Your goals should matter to your business objectives; they should also align with your other goals and with company values.

- **Time-bound** — Goals should have an end date; this is what makes them realistic instead of abstract. It also helps people stay on track, especially if a deadline is approaching quickly!

This goal-setting method helps motivate agents and track progress so you can celebrate your team's successes.

An effective SMART goal example is aiming to decrease the Average Resolution Time (ART) per ticket by 10% over a period of 30 days to ultimately increase overall Customer Satisfaction scores (CSAT) by 10% in the same period.

Specific

Measurable

Attainable

Realistic

Time-bound

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Collaborate with agents

Working together to agree on a reasonable set of customer service goals will encourage the entire team to get behind them. Allowing agents to set personal objectives will improve their happiness and boost productivity. This is especially true when gamification is incorporated into the plan.

This goal-setting strategy involves flexibility from both you and your agents, but everyone should agree on the goals. Create a healthy environment for people to discuss the pros and cons of each metric.

Have both team and individual goals

A great way to motivate your agents is to have both individual and team goals. Setting individual weekly, monthly, and quarterly goals and annual targets for the whole team will establish a mutual understanding of what's expected from everyone. This way, as a team, you can align with the big picture and succeed.
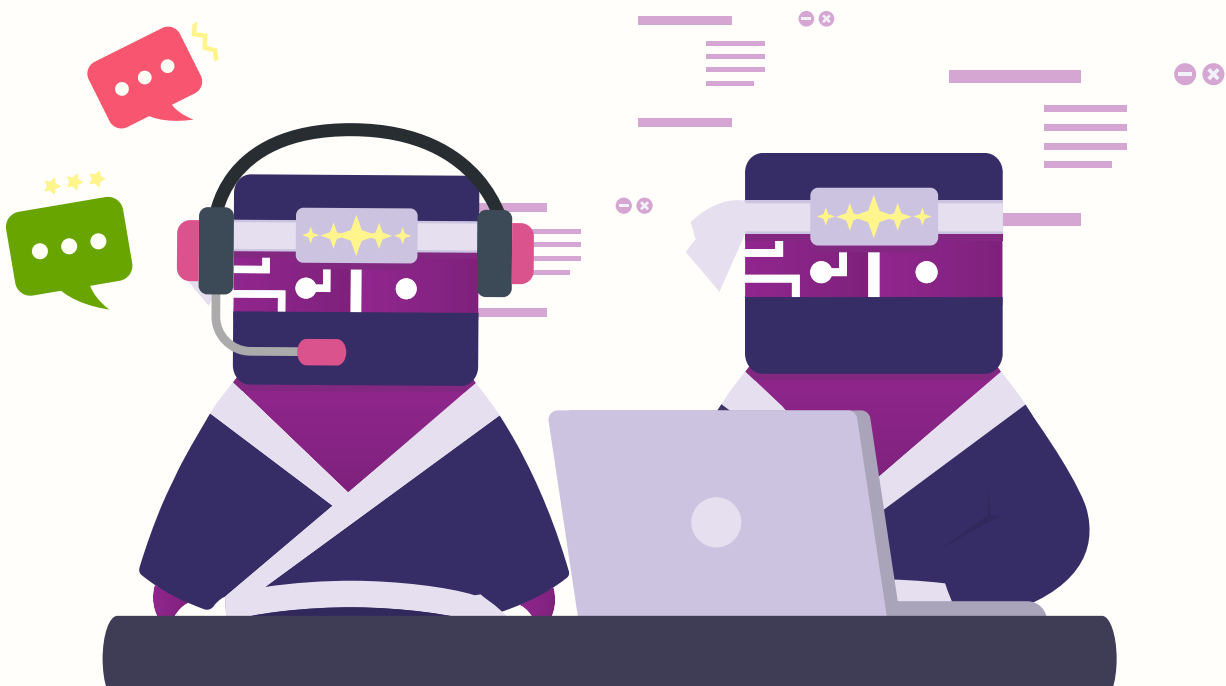
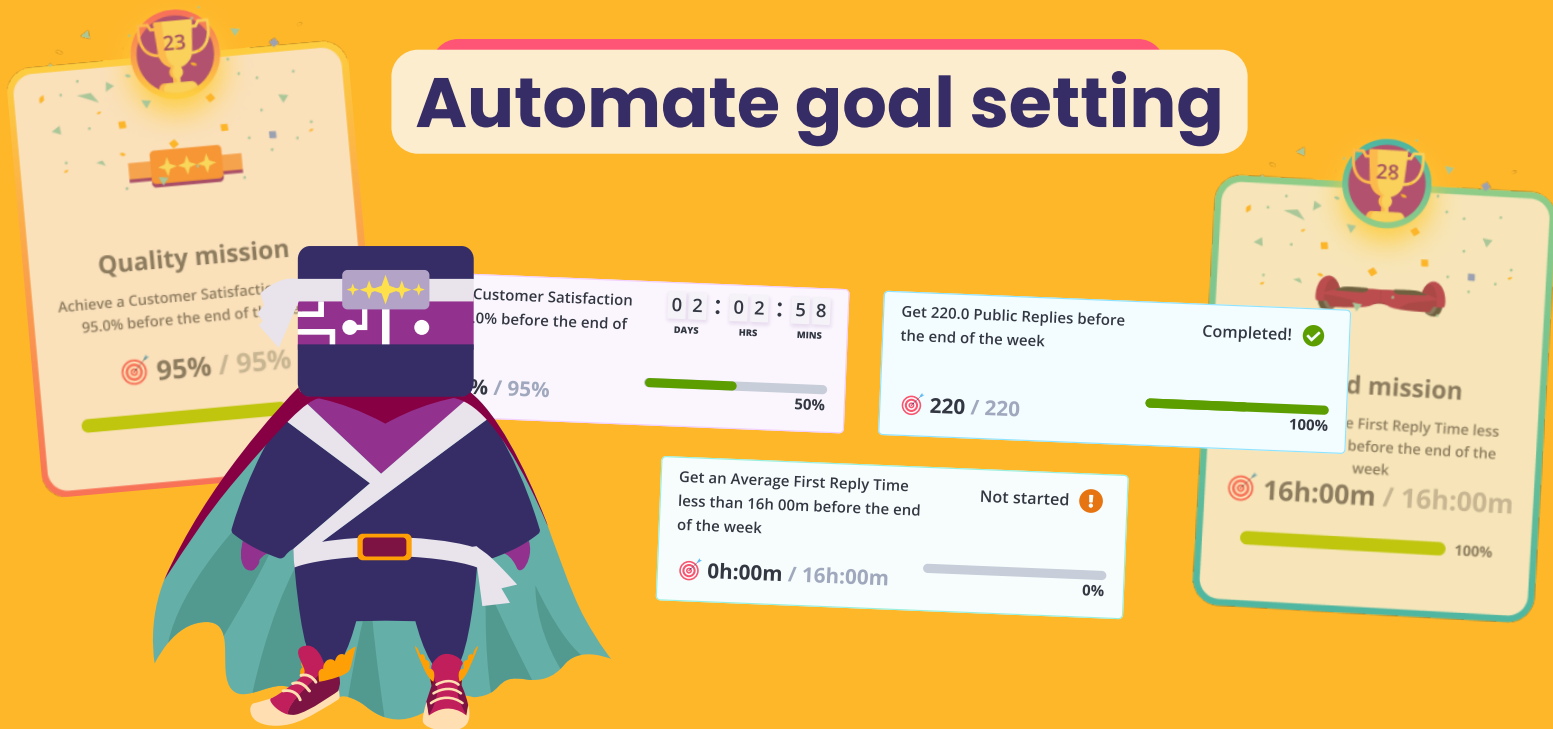# Use tools to set, track, and achieve your goals

Your team's focus is important. That's why it's key to give them the tools they need to track customer service goals with ease. Manual input instead of automated entries, for example, will only deter them from either completing the task of helping customers.

Using gamified skill-building is a fun and effective way to engage your team while tracking progress toward goals at the same time. A unified point system can help proactively steer agents towards aligning and achieving their personal goals alongside the company's. Kaizo is the #1 gamification software on the Zendesk marketplace, helping teams achieve their goals more easily.

Automate goal setting

Quality mission

Achieve a Customer Satisfaction 95.0% before the end of t'

95% / 95%

Customer Satisfaction 0% before the end of

0 2 : 0 2 : 5 8
DAYS   HRS   MINS

% / 95%

50%

Get 220.0 Public Replies before the end of the week

Completed! ✓

220 / 220

100%

Get an Average First Reply Time less than 16h 00m before the end of the week

Not started ❗

0h:00m / 16h:00m

0%

d mission

e First Reply Time less before the end of the week

16h:00m / 16h:00m

100%

Automating your goal setting process is one of the best ways to streamline the process. This can be a time-consuming task, especially if you need to do it from scratch. **And a lot of tools and software solutions can help you automate this process, Kaizo being one of them.**

For example, you can use it to create an automated goal setting and tracking system that will make things easier for you. You get to define and track your goals as well as identify problems along the way. It also helps you with performance management by tracking progress and giving you an insight into your current situation. By putting your agents on a Mission, you can give them clear Speed, Productivity, and Quality goals with specific time frames and rewards to reach.

Not only does this tool save you a lot of time and effort but it also helps you simplify the whole goal management process so that it's more effective and clearer for everyone involved.

8 customer service goals to focus on

Now that you're ready to set goals and motivate your team, it's time to decide what goals to focus on and measure. Run through each category below to create a holistic plan and be sure to include any other measurements important to your team or company.

1. Improving how you measure customer service performance

Earlier we mentioned that manual, tedious input can be time-consuming and hinder productivity. Equally time-consuming are tracking the wrong metrics. First, choose the best customer service metrics based on your company goals. Then you can use performance management software to measure customer service and uncover the pain points that need improvement.

SMART goal in action: Increase the average CSAT from 75 to 80% by the end of the next quarter by training the team twice per week on resolving cases faster.

2. Improving customer service quality

 he satisfaction and retention of your customers depend heavily on the quality of your customer service. Set up a quality assurance framework to streamline the process and improve customer service. You can include processes for evaluating the cause of low KPIs, reducing agent turnover, and increasing customer loyalty among others.

SMART goal in action: Increase the First Contact Resolution (FCR) rate by 2% next month by creating Zendesk macros that provide customers with a quick and detailed solution for commonly asked questions.

3. Increasing customer satisfaction

Learn all about your customers by surveying them at every chance possible. If your customers are happy, it will build loyalty and increase retention rates. It's shown that high satisfaction rates reduce customer churn and increase referrals and revenue.

When measuring customer satisfaction, be sure to include both leading and lagging metrics like CSAT, First Reply Time (FRT), and total tickets solved. These will provide you with a perspective on what's working and where you can improve. Listen to your customers and you'll find out what's most important to them as well.

SMART goal in action: Improve FRT by 20 minutes or 5% per agent by the end of next quarter by hiring two new agents to spread the workload evenly.
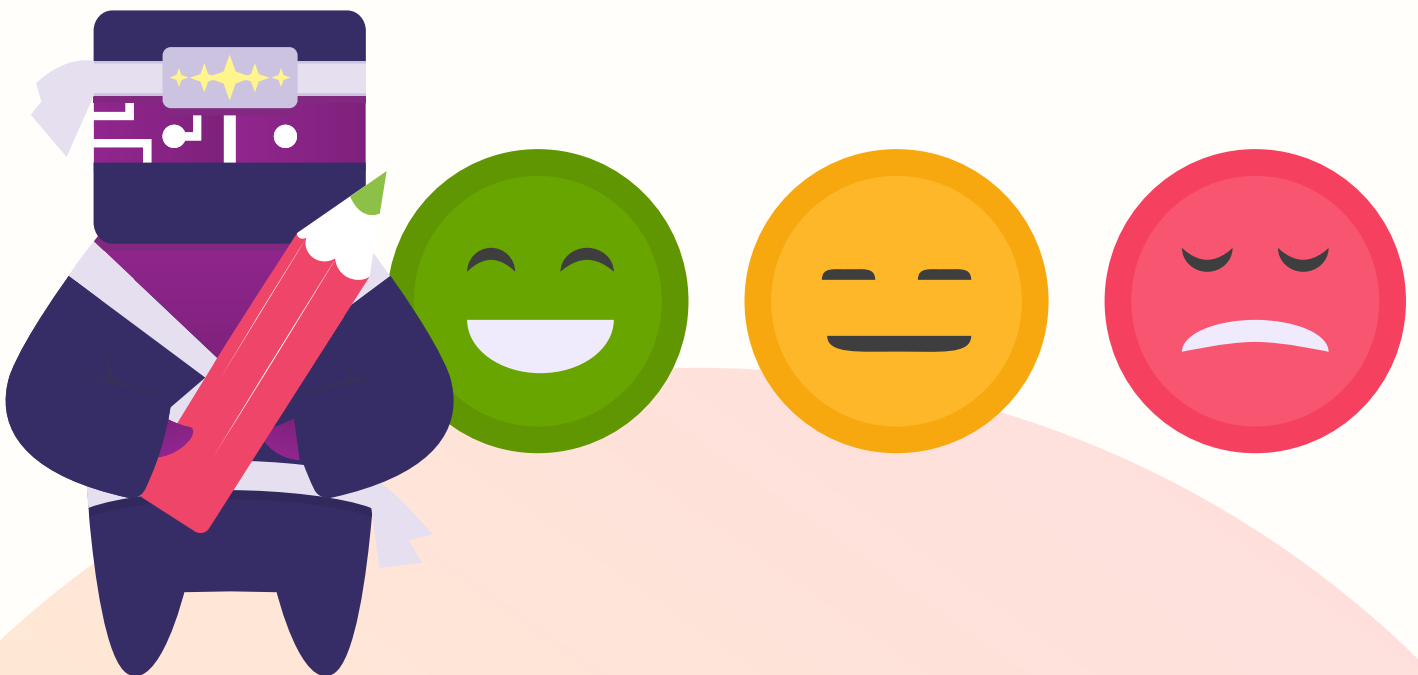
4. Increasing operational efficiency

Make sure the entire customer service process is functioning smoothly and efficiently. Evaluate if there are gaps in the customer experience to discover ways you can improve the process.

Whether it's a new tool or more agent training, there are often improvements that can be made. You can also work cross-team to assist with vendor relationships and supply chain processes.

SMART goal in action: Use this information to increase your FCR by 5% by next quarter. Do this by incentivizing customer replies that have a high (4-5 out of 5 for example) internal QA ratings.
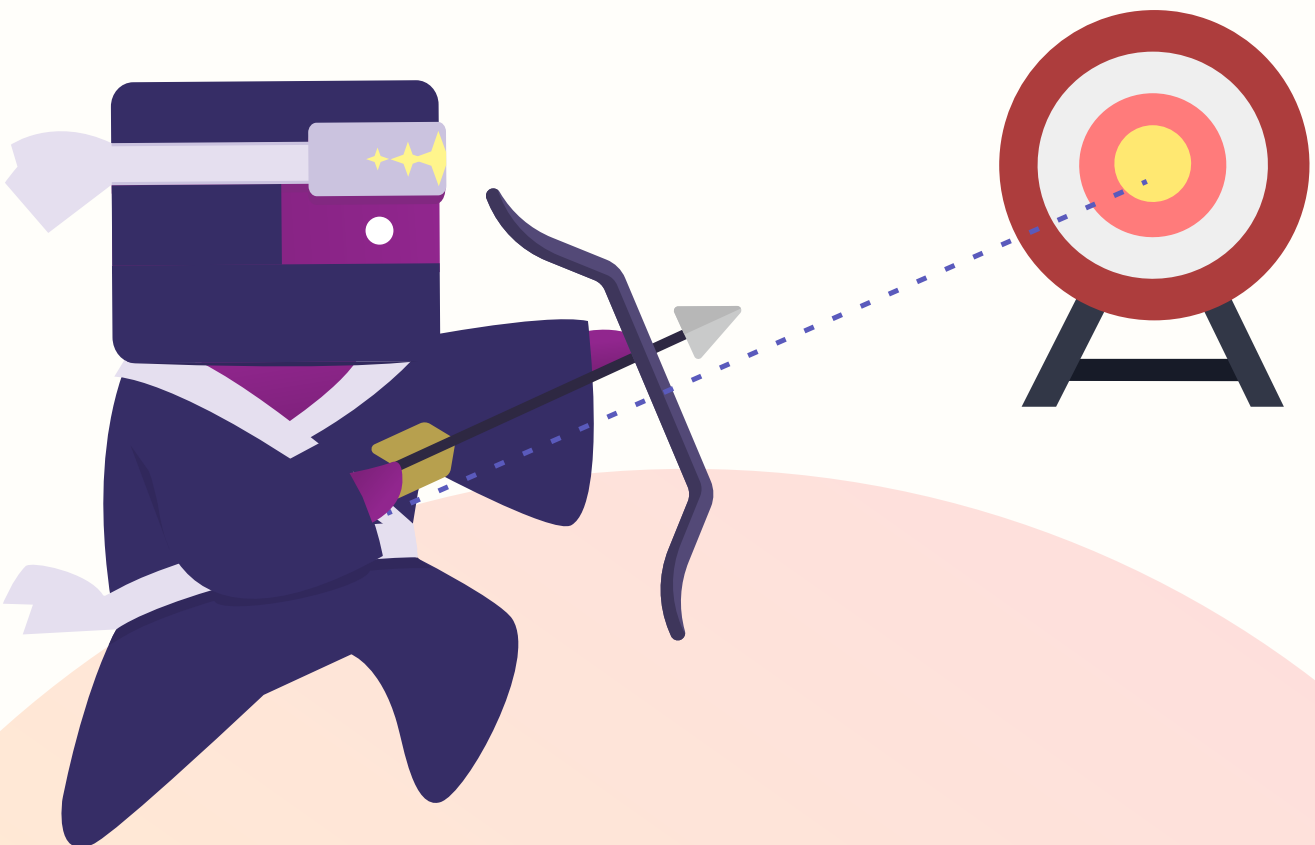
5. Developing better problem-solving skills

An important leveling-up skill for managers and agents alike is to solve problems effectively. Resolving issues quickly can help increase your CSAT, but scores are also impacted by how helpful an agent is, regardless of whether it's possible to solve the problem or not.

SMART goal in action: Reduce Average Resolution Time (ART) by 20% in Q3 over Q2 by helping agents improve their problem-solving skills through weekly one on one quality feedback meetings.

6. Leveling up leadership skills

Leadership skills should not be dedicated only to managers. Agents should also feel empowered to take the lead, and collaborating in goal setting will reinforce this. Encouraging your customer service teams to learn new skills can make them feel more confident in their overall performance.

SMART goal in action: Each agent will complete a new skill course in leadership by the end of the next quarter. Allow for one hour per week during the workday to accommodate this.

7. Boosting employee happiness and team spirit

In a tumultuous year, things are changing rapidly. More than 50% of workers are expected to look for new jobs in 2021. The pandemic has shifted mindsets and people are looking for opportunities where they will be happy, appreciated, and engaged.

One way to accomplish this is to gamify measuring customer service performance. Have your employees create their own measurable goals and accomplish them within their own (reasonable) time frame.

SMART goal in action: Evaluate your team's happiness rate with an anonymous survey and compare it against employee turnover rates for the past year. Then based on the feedback from your team, you can set a goal to improve employee retention by 5% by the end of the next quarter.
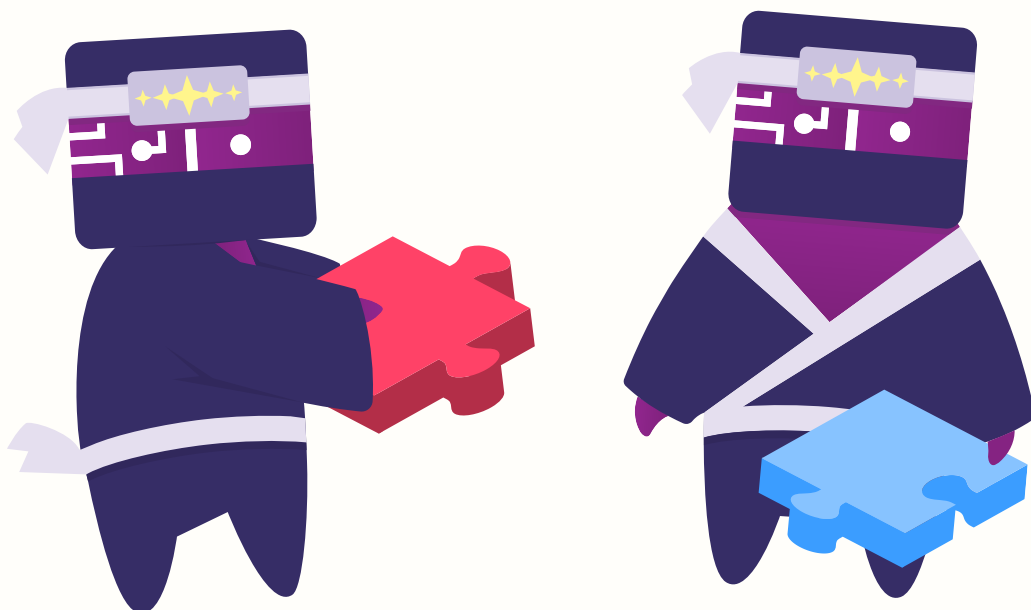
8. Creating an omnichannel customer service experience

Meeting your customers where they are (i.e. via their preferred communication channels) can help you accomplish your team goals exponentially. When people are saying it's difficult to reach you, ask them where they normally go to contact you. Should it be the website, have an easy 'contact us' button that lists all the ways they can get in touch. If customers prefer to contact you through Facebook Messenger, make sure you've assigned agents to manage this channel.

The key here is to make sure you're maintaining customer service quality and not overstretching resources. For some businesses, this may mean focusing your customers and agents on fewer channels.

SMART goal in action: Add two more customer service channels including social media and live chat by the end of Q3. Assign managing these two channels to two to three agents to make sure the average Agent Reply Time is 24 hours or less.

Email
Chat
Voice
Phone
Social

Using gamification to empower agents and reach customer service goals

Customer service goals don't have to be evasive. They can be engaging, motivating, and team-aligning if you follow these steps.

Kaizo's skill building with AI and gamification tools are built to help increase your agents' happiness and productivity.

Giving your team the power to improve their skills, achieve weekly KPIs, and get their progress recognized are incredible motivators. Kaizo helps empower your agents by using a customized point system to proactively steer their performance for certain improvement.

Common goals lead to a cohesive team

Customers want to be able to talk to you when they need support or advice. They want a fast response time and a helpful representative on the other end of the line.

Use tools like gamification, skill-building, and creating SMART goals to streamline and improve customer service quality. Supporting each other throughout the process will provide the confidence that each individual can contribute and accomplish your customer service goals.

"Kaizo is helping me better manage my customer support team. Period. With all my team's performance data at my fingertips in real-time, I can spend more time on providing feedback and less on data entry. Not only that, agents are now setting and tracking their own goals, giving me even more time to focus on what's important and giving them the clarity they need to achieve!"
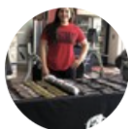
Stephanie Guillen | Consumer Engagement Manager at Universal Nutrition

★★★★★   9 months ago

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