![Gladly]

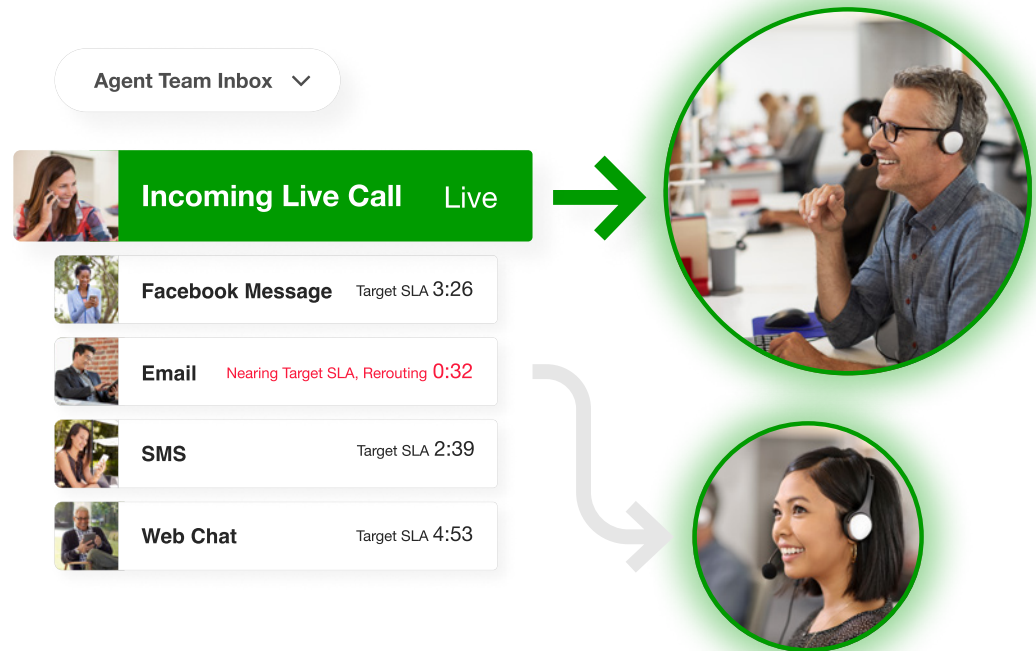# Customer Service Software Migration Checklist

Use this before you make a move

Customer service is central to your brand's customer experience and business success. But when you face the dual challenges of meeting rising consumer expectations and managing existing operations, the right customer service platform is critical to your success.

Aging ticket-based systems, disconnected channels, systems, and customer information all introduce boundaries that impact operations and customer experiences. They make your customer feel like a transaction instead of a human.
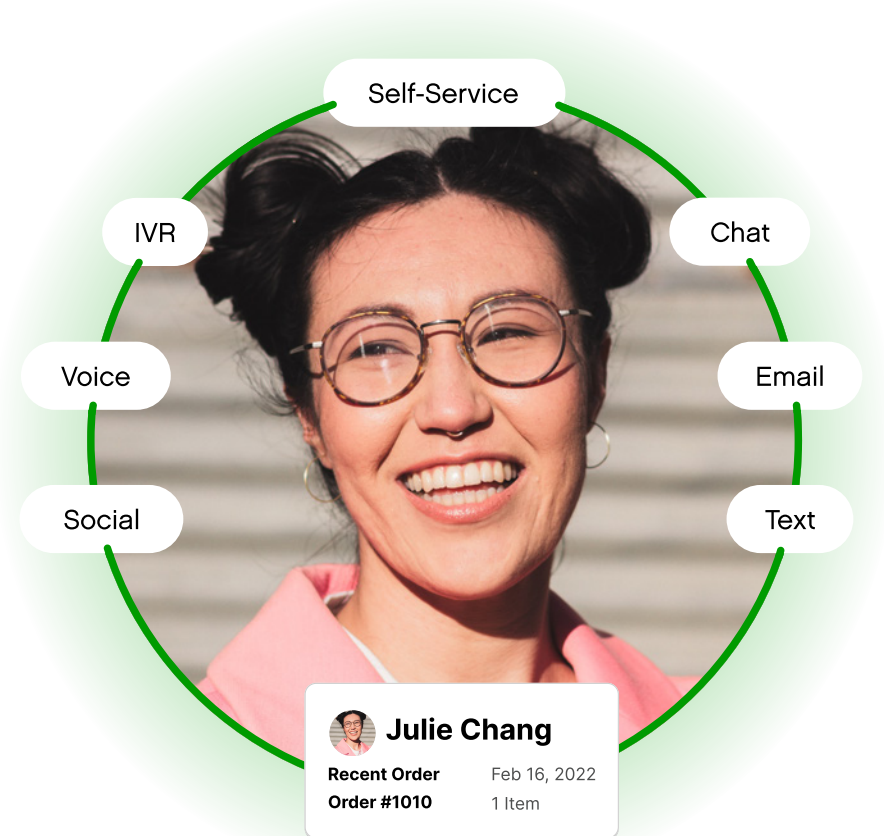
With the right platform and provider all those different systems, channels, and customer events are drawn together so your teams can focus on helping people, not just closing tickets. You can deliver the kind of service your customers expect on any channel and even drive revenue from service and support conversations.

It all starts with a people-centered approach to customer service. Use this migration checklist as a handy guide when you're ready to explore different options for a customer service platform.
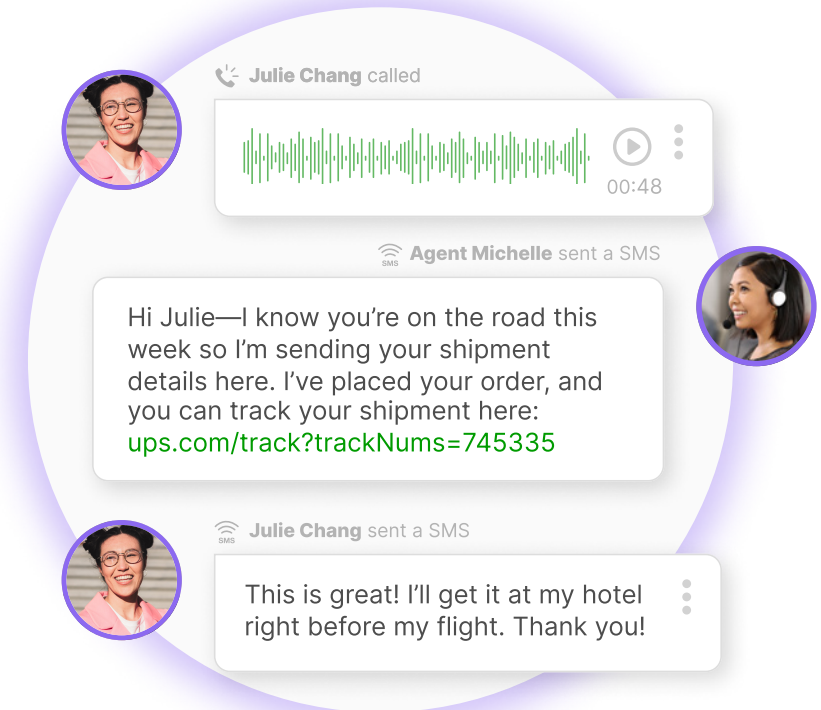

Agent Team Inbox

Incoming Live Call   Live

Facebook Message   Target SLA 3:26

Email   Nearing Target SLA, Rerouting 0:32

SMS   Target SLA 2:39

Web Chat   Target SLA 4:53

Radically personal customer service

![Gladly]

Identify your goals

Which of these business outcomes are most important for your organization?	YES	NO
Increase customer loyalty/lifetime value	☐	☐
Improve Net Promoter Score (NPS)	☐	☐
Reduce customer churn/increase retention	☐	☐
Simplify infrastructure/solution management	☐	☐
Increase new sales or up sell revenue	☐	☐
Increase efficiency for every customer conversation	☐	☐
Improve agent/employee satisfaction (eNPS)	☐	☐
Reduce agent/employee turnover	☐	☐
Solve integration issues that affect business operations	☐	☐
Reduce IT support and development challenges	☐	☐
Accelerate new solution time to value	☐	☐
Increase new solution return on investment (ROI)	☐	☐
Reduce total cost of ownership (TCO)	☐	☐

Self-Service

IVR   Chat

Voice   Email

Social   Text

Julie Chang

Recent Order   Feb 16, 2022
Order #1010   1 Item

If cross-channel integration is important, ensure the customer service platform you choose handles all channels - digital AND voice - from the same platform, and gives you a single view of everything. It also should be able to transition your customers between channels smoothly, with context, to deliver effortless customer experiences.

Radically personal customer service

Gladly

Identify your goals

How much flexibility do you need?	YES	NO
Easily adjust staffing levels up or down as needed	☐	☐
Onboard agents quickly and get them productive sooner	☐	☐
Understand and adjust agent and manager permissions quickly	☐	☐
Adjust team allocation and channel assignments as you need to	☐	☐
Use multiple drivers in rules to route and boost incoming requests	☐	☐
Set up different rules by business hours, region, language, holidays, and more	☐	☐
Connect with other applications or services, such as CRM systems, workforce management systems, unified communications, and APIs	☐	☐
Add data and actions from other systems into agent views	☐	☐
Enable event subscriptions to drive external automation	☐	☐
Quickly roll out new features, services, or capabilities as your business needs change	☐	☐
Easily consume innovation	☐	☐

Julie Chang called

00:48

Agent Michelle sent a SMS

Hi Julie—I know you're on the road this week so I'm sending your shipment details here. I've placed your order, and you can track your shipment here: ups.com/track?trackNums=745335

Julie Chang sent a SMS

This is great! I'll get it at my hotel right before my flight. Thank you!

Radically personal customer service

⊕ Gladly

What capabilities do you need?

Core capabilities	YES	NO
Customer history view with all points of interaction shown	☐	☐
Single routing engine for all channels	☐	☐
Native voice services	☐	☐
Basic IVR	☐	☐
Callback tools	☐	☐
Customer authentication	☐	☐
Voice recording	☐	☐
Reporting	☐	☐
Open APIs for data and custom features	☐	☐
Digital channels		
Website Chat	☐	☐
In-App Chat	☐	☐
Email	☐	☐
SMS / Text	☐	☐
Social Messaging	☐	☐
Secure Payments	☐	☐
Self-service and automation		
Advanced routing (match customers to agents) using multiple variables	☐	☐
Data analytics	☐	☐
Voice bots, chatbots, or blended bots and agents	☐	☐
Single knowledge repository with controls for all channels, audiences, languages	☐	☐
Callback tools	☐	☐
Web help center and FAQ with answers sourced from a single knowledge repository	☐	☐

Hi, how can we help? ✕

🔍 Search for answers

Cancellations and Rebookings ⬈

Baggage Policy ⬈

Lost and Found ›

Flight Status ›

💬 Chat with us!

Research vendor domain experience to ensure they have a deep understanding of the pains, desired outcomes, and end consumers of companies in your industry or and/or stageof growth.

Radically personal customer service

⊕ Gladly

What capabilities do you need?

Monitoring and insights	YES	NO
Access to all data and metrics in the system	☐	☐
Real-time dashboards	☐	☐
Historical reporting	☐	☐
Custom report and dashboard builder	☐	☐

Task management, Collaboration and insights	YES	NO
Real-time updates on activity	☐	☐
Daily view for related activities and events as home page	☐	☐
Drill-down in customer history for details and recordings for earlier conversations	☐	☐

Out-of-the-Box Integrations to easily add other business systems	YES	NO
eCommerce apps for platforms like Shopify, Big Commerce, Magento and many others	☐	☐
Customer satisfaction measurements apps for CSAT	☐	☐
WFM (Workforce Management) apps for scheduling your teams	☐	☐
AI/automation apps for many uses (for example, intelligent automation of responses in text channels like chat, email, and social networks)	☐	☐
QA and Quality Management to evaluate your teams and monitor performance	☐	☐
Apps for loyalty tools	☐	☐
Product Review tools with monitoring	☐	☐

Radically personal customer service

➕ **Gladly**
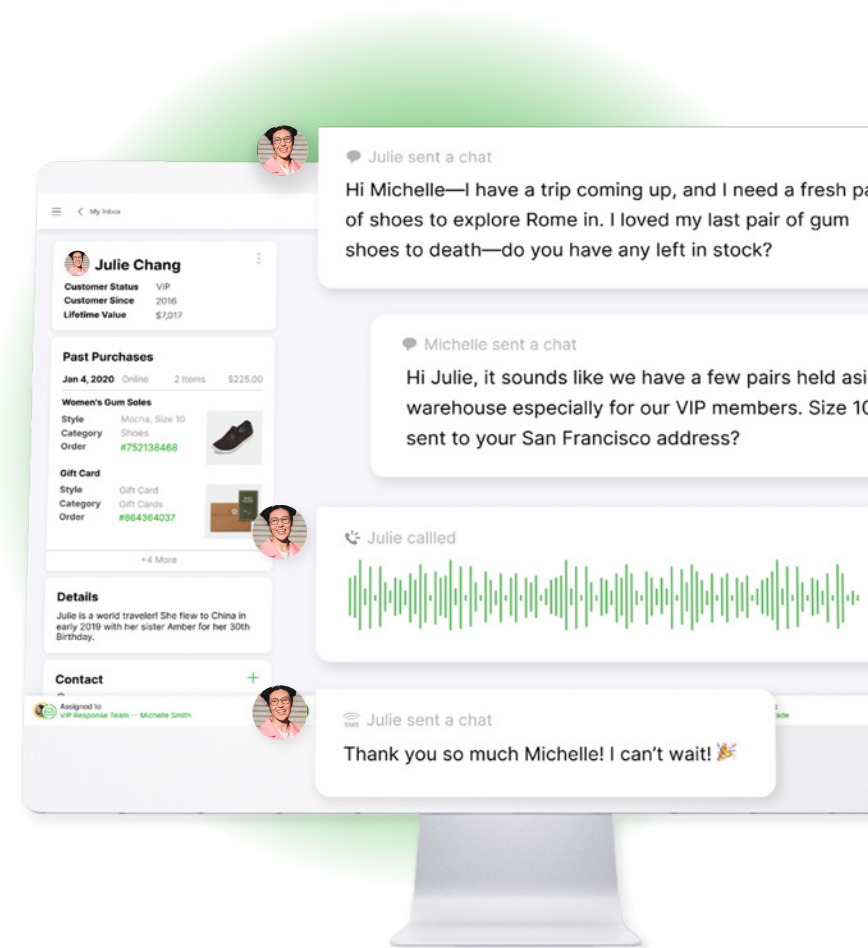
Evaluate Vendors

What is the vendor's customer experience (CX) technology expertise and track record?	YES	NO
Proven domain expertise	☐	☐
Published customer success stories with business outcomes	☐	☐
Referenceable customers in your industry	☐	☐
Independent user reviews and ratings	☐	☐
Strong product roadmap and track record of investment in innovation	☐	☐
A platform that is not modeled on a decades-old approach to service	☐	☐
Voice recording	☐	☐
Reporting	☐	☐
Open APIs for data and custom features	☐	☐

How is the vendor perceived in the industry?		
Website Chat	☐	☐
In-App Chat	☐	☐
Email	☐	☐
SMS / Text	☐	☐
Social Messaging	☐	☐
Secure payments	☐	☐

Look for third-party information and ask vendor references about the vendor's post-sale experience: does it appear project-oriented or outcomes / value oriented? (Do you sense they see your engagement as a project-based transaction, or as a long-term relationship?)

Radically personal customer service

Gladly

Evaluate Vendors

What is the vendor's customer migration experience?	YES	NO
Determine whether it has a well-defined migration process or methodology	☐	☐
Learn what it offers, post-deployment, to ensure continued customer success and value realization	☐	☐
Find out about any trends relative to your incumbent vendor	☐	☐
Speak directly with at least three (3) other customers the vendor has migrated from your incumbent vendor	☐	☐
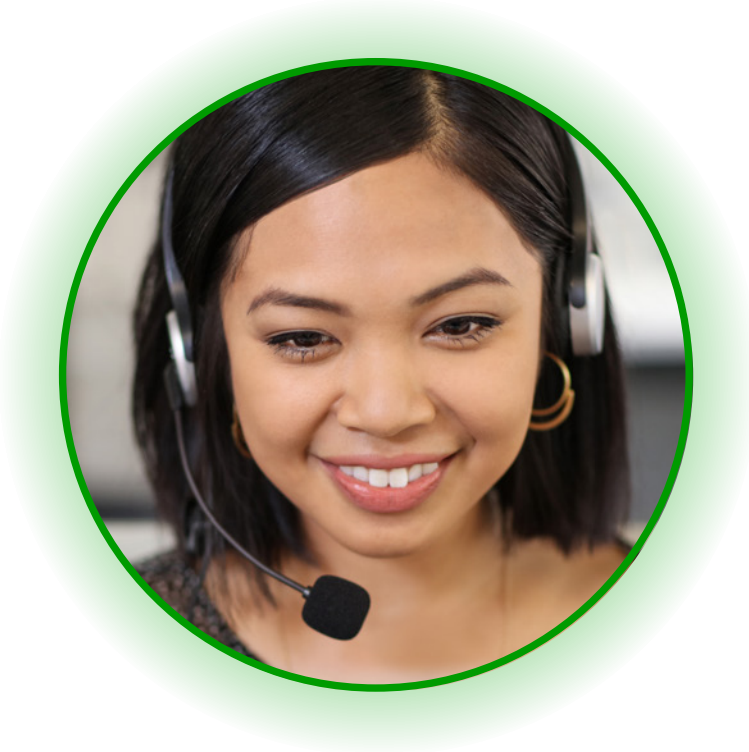
Next Steps

If your current customer service platform is making it increasingly difficult to meet today's customer expectations and business demands, Gladly is here to help. We'll work with you to identify what might be blocking you from reaching your CX vision, define a realistic plan to get there, and apply proven strategies to reduce risk and smooth your move to Radically Personal customer service.

Radically personal customer service

⊕Gladly