



Mastering methods to **minimize backlog** and boost efficiency



Welcome!

During peak seasons or unexpected spikes, customer service teams find themselves navigating a maze of challenges — from soaring call volumes and extended wait times to heightened customer expectations and third-party complications, such as delayed shipping.

The repercussions of customer support backlog loom large, eroding customer satisfaction and loyalty.

In this eBook, we offer practical solutions to streamline your support processes and manage the ticket backlog so you can focus on what matters most — delivering exceptional and timely customer service.

95% of consumers say customer service impacts their brand loyalty.

Source

What's inside?

- How to triage tickets for faster resolution
- 3 tools to manage the backlog
- Forecasting calculator to predict headcount
- Working with a support provider: case studies on backlog resolution

Ticket triage

Two customer support tickets come into your helpdesk at the same time. How do you choose which ticket to respond to first?

All support tickets need to be answered promptly and accurately, as most of your customers' experience is based on the type of customer service they receive, but some tickets are more urgent than others.

The solution? Ticket triage.

Why triage tickets?

Customers like fast responses. Ticket triage categorizes, prioritizes, and manages incoming support tickets based on their urgency and complexity.

As a way to manage and reduce backlog, ticket triage helps streamline the overall support workflow by routing tickets to the right agents, reducing the need for handoffs and unnecessary delays in issue resolution.



“Efficient ticket triage is crucial for customer support. It helps categorize and route customer inquiries correctly, which in turn results in faster, more reliable support and happier customers.”

- Zsa Zsa, Customer Service Agent, 3+ years at Influx

3 steps to triage tickets

1. Understand which tickets are a priority

Clear ticket organization demonstrates that a support team values and respects their customers' time and concerns. It also prevents support teams from spreading themselves too thin. Below is a common ticket classification system that many teams use to prioritize tickets.

Common ticket classification system:

P1 (Critical / urgent priority):

P1 tickets are the highest priority and represent critical, urgent issues that require immediate attention.

Response time: Teams typically aim for an immediate response and work towards resolving the issue without delay.

P3 (Medium priority):

P3 tickets are of medium priority and represent issues that need attention but are not critical or urgent.

Response time: Teams typically respond within standard SLA (Service Level Agreement) timelines.

P2 (High priority):

P2 tickets are high-priority issues that need prompt attention but may not be as severe or urgent as P1.

Response time: Teams aim for a timely response and resolution, usually within a shorter timeframe than lower priority tickets.

P4 (Low priority):

P4 tickets are the lowest priority and typically represent minor issues or non-urgent inquiries.

Response time: Teams may respond within standard SLA timelines, but resolution times may be longer than higher priority tickets.



3 STEPS TO TRIAGE TICKETS CONT.

2. Use tools to categorize and tag tickets for better organization

Through tagging, agents can identify the severity of issues and organize tickets by category and age, addressing critical issues first to ensure that customers with pressing problems receive prompt assistance.

Helpdesk software like Zendesk and Gorgias come with various features that streamline the ticket management process.

“Some issues require immediate attention, as they cause significant disruptions to the customer. Although all tickets are important and need to be resolved promptly, urgent issues should be given priority over low-priority ones.”

- Zsa Zsa, Influx Customer Service Agent

Pro tip:

Bulk edit responses.

After organizing tickets, you may notice that some customers have the same issue. In this case, it can save time to bulk edit responses.



3 STEPS TO TRIAGE TICKETS CONT.

3. Establish a prioritization framework based on urgency, age of ticket, and complexity

Prioritizing support requests based on their age and complexity enables support teams to manage their workload more effectively and provide prompt and efficient customer service.

Creating a ticket prioritization framework:

Step 1: Define your priority levels
(See P1 - P4 on page 4).

Step 2: Determine ticket urgency criteria

What problems are included in each priority level?

Step 3: Consider the ticket age

Define specific time brackets for each priority level and prioritize older tickets for timely resolution.

Step 4: Assess ticket complexity

Ensure that complex issues are assigned to appropriately skilled team members.

Step 5: Establish a scoring system

Give each factor—urgency, age, and complexity—a numerical weight.

Step 6: Sum the weights to determine the overall priority score for each ticket.

Utilize a ticketing system that can automatically calculate and assign priority scores based on defined criteria.

Gather feedback from the support team to identify any areas for improvement. Regularly review and adjust to align with changing business needs.



Managing the backlog

1. Employ macros for repetitive queries

Creating strong macros:

- Analyze your ticket data to identify the most frequent and repetitive customer queries or issues.
- Group similar queries into categories. This categorization will serve as the basis for creating macros that address specific types of issues.
- Write clear and concise responses. Avoid unnecessary jargon and use straightforward language to ensure that customers can easily understand the information provided.
- Include elements of personalization in your macros.
- Before deploying macros, test them to confirm they work as intended. Solicit feedback from your support team and make adjustments based on their input. Then, ensure that support agents can easily access and apply macros.

*Periodically review and update your macros to align them with evolving customer needs and changing business processes.

Macros provide standardized and accurate responses to frequently asked questions, freeing up agents' time to respond to a larger volume of tickets.

Macros are an invaluable way to lower average handling time and minimize human errors while still giving the same high-quality communication and care to each customer interaction.

MANAGING THE BACKLOG CONT.

2. Partner with a service provider

In certain scenarios, businesses find themselves lacking the necessary resources to stay ahead of a backlog, causing an influx of tickets that can quickly become overwhelming and impede any meaningful progress.

This situation often leads to burnout among support teams and growing frustration among customers. Service providers prove to be a valuable solution.

Outsourcing partners like Influx, with specialized expertise in customer service operations, bring a wealth of experience to optimize the support process, effectively alleviating the pressure off internal support teams and bringing them back to inbox zero.

70% of brands list cost reduction as their top reason for outsourcing.

Source

Why Influx?

- Launch in one week.
- All plans include training and management with no setup fees.
- Hire offshore or onshore with no lock-in contracts and a pay-as-you-go pricing model.
- Get flexible solutions designed to fit your specific needs.
- Clear the inbox with high quality customer service in a simple month-to-month format.


Get in touch for a custom quote!

MANAGING THE BACKLOG CONT.

3. Establish contingency plans


Businesses should establish contingency plans for unexpected spikes by having a pool of on-call or temporary staff, implementing automated responses for common queries, and leveraging cloud-based scalable infrastructure (if available) to handle increased loads.

Regularly reviewing and updating these plans based on past performance and evolving challenges ensures adaptability during peak times.



“Consistent support reinforces trust, fostering positive relationships even in peak periods.”

- Carlos M De Vasconcellos, Client
Team Leader at Influx



Forecasting headcount calculator

Headcount forecasting plays a pivotal role in helping support teams prepare for busy seasons. By analyzing historical data and identifying trends, teams can accurately predict when periods of increased demand are likely to occur and prepare accordingly.

In our [easy-to-use forecasting headcount calculator](#), we've made it simple to do just that.

All you have to do is add in these three key numbers:

1. Average sales volume
2. Average support ticket volume
3. Expected sales volume

Use the free and simple [support forecasting calculator](#)!

“Even when you manage to strike a balance between order volume and operational capacity, unforeseen issues still arise that create challenges for your customers.

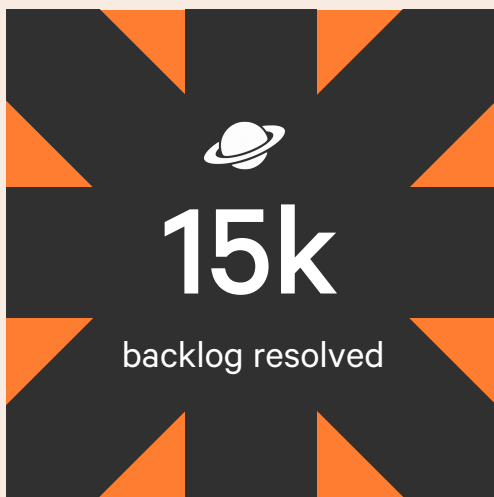
You want to ensure your team is staffed and not burned out enough to provide an amazing customer experience.”

- Lexi, Head of Client Experience



Working with a support provider: case studies on **backlog resolution**

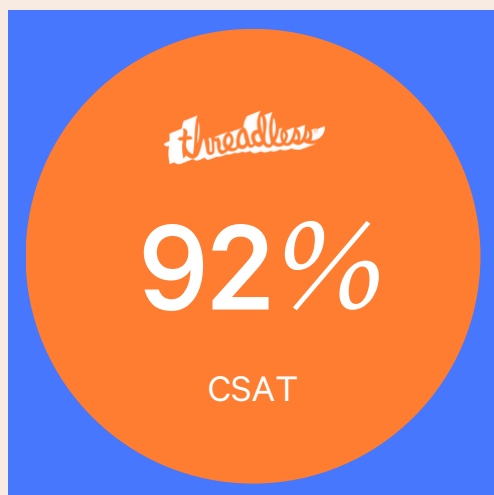
Brands of all sizes work with Influx to clear the backlog and stay flexible all year round, scaling up or down as needed.



See how Saturn [resolved a 15K+ backlog due to seasonal growth](#) by partnering with Influx – scaling from 5 to 22 agents.

- 4x seasonal ticket spikes flex
- 24/7 coverage for SMS and in-app messaging

[Learn more →](#)



Read how Threadless [resolved a 2,800+ ticket backlog, all while maintaining a 92% CSAT](#) by partnering with Influx and scaling up during busy periods.

- After hours support
- Seasonal scale up coverage

[Learn more →](#)



See how ClassPass [resolved 250,000+ tickets per month](#) and surpassed KPIs by partnering with Influx.

- 89% single touch resolutions
- 49% reduction in first response time

[Learn more →](#)

Ready to clear the backlog?



Maintain inbox zero and clear the backlog with fully managed support teams—pre-trained to respond precisely as your in-house team would, on brand and at scale.

Tackle the backlog and get a handle on ticket volume with dedicated teams trained to deliver fast, high-quality support to your customers.

[Get in touch for a quote](#) →