

# Mastering Peak Season: The Ultimate 8-Step Customer Service Playbook





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# Thriving in peak demand



Every industry has its own peak season. Travel spots see an influx of tourists in summer. Retail buzzes around the holidays. But no matter the sector, one thing's for sure: customer service teams become the frontline warriors, facing increased inquiries and demands.

**Prepare your agents for the impending surge in questions by gearing up for these busy periods. Dive into our eight-step guide to ensure your team is equipped and ready to tackle the influx before it hits.**





# The Ultimate 8-Step Customer Service Playbook



## Review past performance data

Don't guess at what happens during your busiest season. Let the data guide you. [Analyze your historical data](#) from previous peak seasons to:

- ✓ Identify query volume patterns
- ✓ Track common issues during high-demand periods
- ✓ Analyze response times and customer satisfaction

Use your past [performance analytics](#) to accurately predict upcoming demands and strategically plan your team's resources. Utilize these insights to assess whether you need to hire additional staff temporarily or reallocate your current team members to meet expected needs. Consider also the potential of integrating automation to streamline tasks and improve workflows, ensuring your team is optimally prepared.





## Don't forget to ask your team

Your CS team is on the ground every day. Ask them about the most common queries, their struggles at busy times, and where the bottlenecks are. Discover when they feel most rushed, and identify when they most need additional support.





# 02

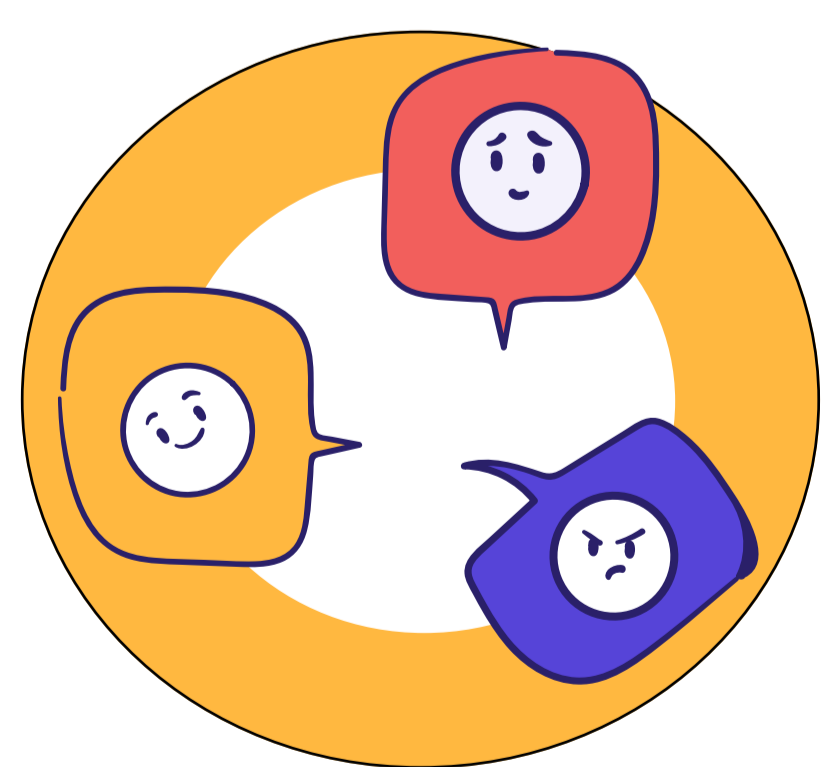
## Set clear goals and KPIs

We know during peak season just clearing the backlog of tickets feels like a big win. But you can plan much better if you set clear goals and decide on [the key performance indicators \(KPIs\) you'll need to measure your success.](#)

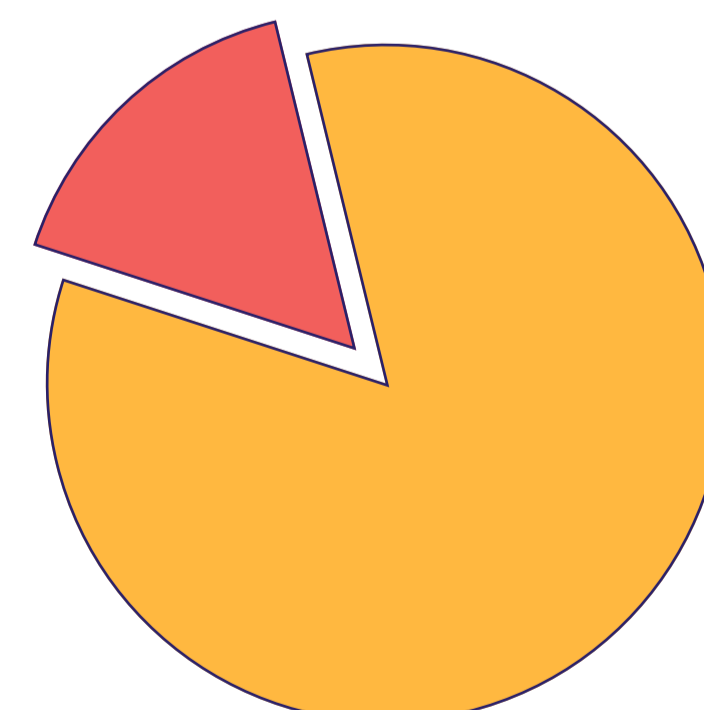
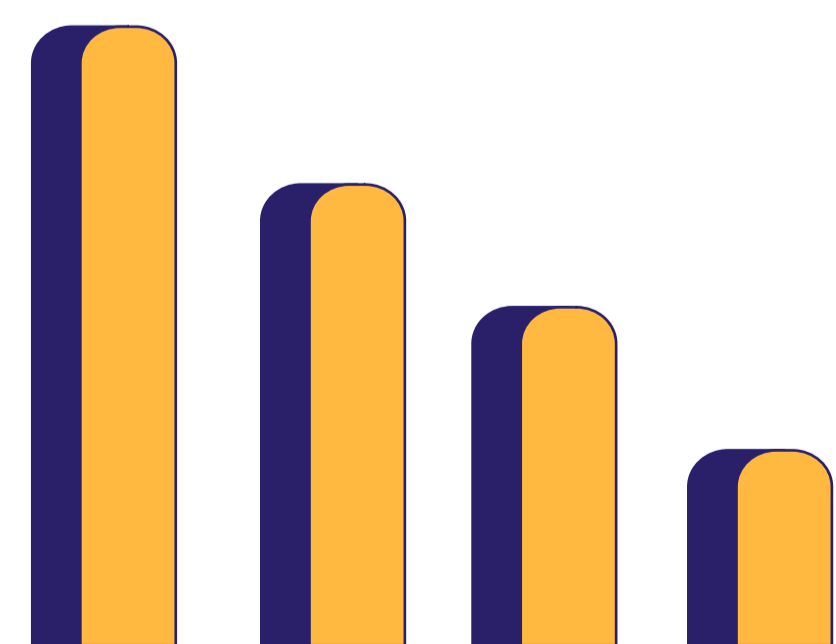
What does success look like for your team during rush hour?

- ✓ Improving resolution rates
- ✓ Focusing on first contact resolution
- ✓ Trimming resolution times
- ✓ Boosting customer satisfaction scores

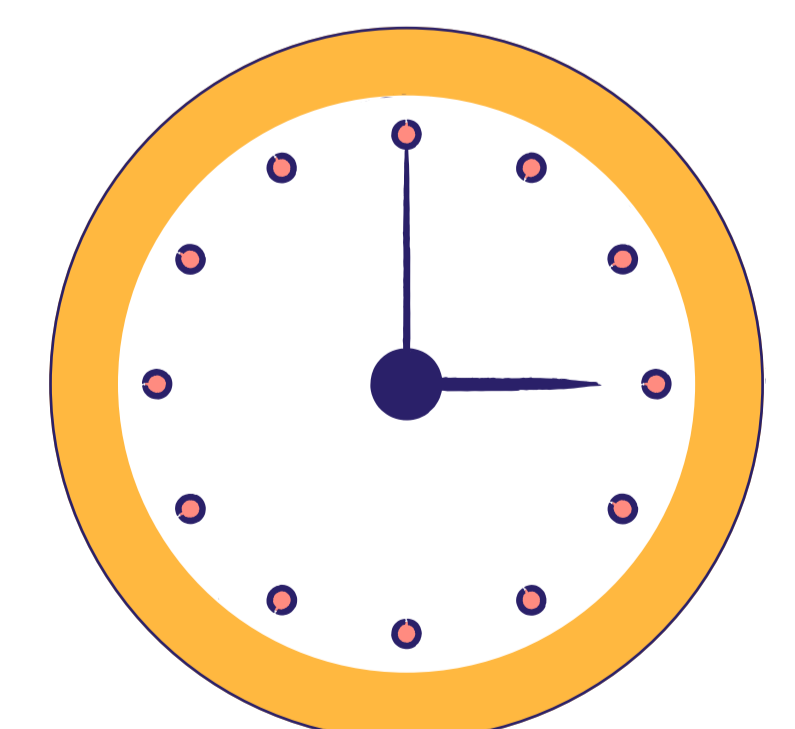
Clearly articulate your goals to the customer service team, ensuring everyone is in sync. It's key that both team objectives and individual roles are understood by all to foster a unified effort.



CSAT



FRT





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## Train and upskill your team

A knowledgeable and [well-trained](#) team not only provides better answers but also leads to happier customers. But getting that team in place can be tricky, with [43%](#) of customer service teams saying that [hiring](#) and training are their most significant challenges.

Make sure your team is well versed in every aspect of your product, including any recent update. Check how comfortable they are with your customer service software, too. Find out if they know all the tools and features, and address any confusion. If you've added anything new to your [technology stack](#) recently, get your team up to speed before the busy season hits.

Cross train your team on different aspects of your CS process. Your customers will benefit from you having a more agile team, with less need to escalate to different team members.

Prepare your team now so you're not scrambling to get them ready each time peak season hits.





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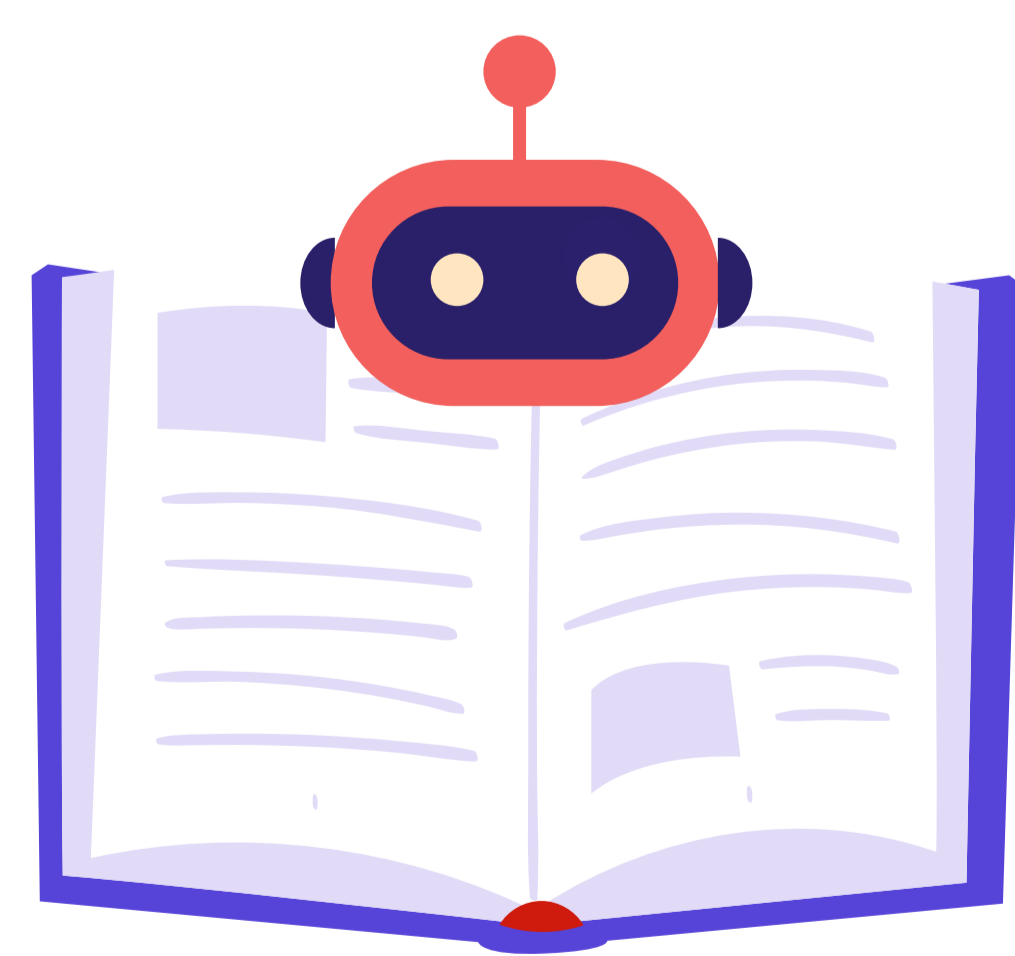
## Update your knowledge bases

Self-service resources like knowledge bases (KB) are crucial during Mother's day, ensuring timely access to the right information for both agents and customers. Make sure your internal and [external KB](#) have:

- Current information for agents and customers alike
- Troubleshooting steps for common (and uncommon) problems
- Answers to frequently asked questions

An [AI-powered knowledge base efficiently handles](#) simple queries, improving first contact and overall resolution times, and lightening the load on your agents to help them stay at their best.

Don't forget your knowledge base is also a great source of training materials. This is especially helpful if you're onboarding temporary seasonal hires.





## 05

## Implement and optimize AI tools

AI can be your agents' best ally. Increase your team's efficiency by [using AI-chatbots and AI-powered tools](#) to handle routine queries. This enables your agents to not only focus on more complex queries but also acts as a silver bullet against boredom, ensuring their tasks remain diverse and engaging.

Take one of our customers, [tink](#), a European open banking leader. They saw a 39% decrease in their average handling time after implementing [Dixa's AI agent assistant](#). The AI assistant helped agents get up to speed by summarizing each customer's history. The team spent less time catching up and customers loved not having to explain themselves twice.

To replicate this success, it's crucial to onboard AI tools well before your peak season. You want your team familiar with the tools and ready to hit the ground running before the customer queries start stacking up.





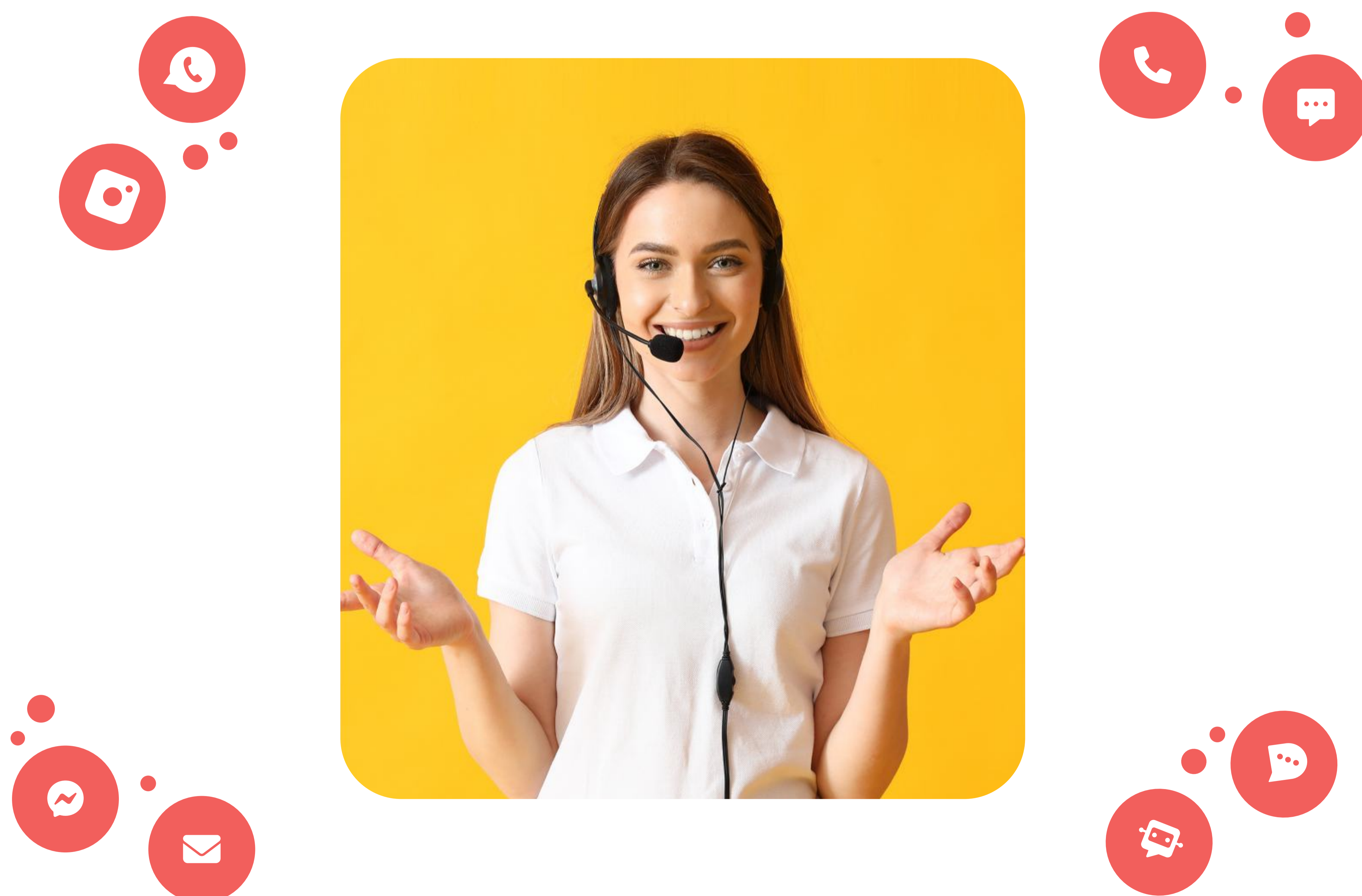
# 06

## Enhance your multi-channel support

Consistency and efficiency across all channels are critical to better support at busy times. Whether customers [reach out via email, social media, phone or chat](#), they should receive the same stellar service.

Consider one of our retail customers, they were struggling to manage different channels in the run up to Black Friday. Juggling channels across three separate systems was time consuming and frustrating for their agents. Switching to Dixa let the team see and handle all channels from [one screen and centralized agent workspace](#).

Instead of twelve agents scrambling to handle the rush, they were able to manage easily with just four agents. Their customer service was more efficient, they saved on costs, and they kept their customers happy during the shopping frenzy.





# 07

## Communicate with your customers

If you're extending your service hours or offering alternative support options during the peak season, let your customer know ahead of time. Keep customers in the loop so you can manage expectations.

Even more important - let them know about potential problems. It's tempting to hide problems from customers, but being honest will build better customer relationships. If you've fallen behind on tickets, or you're experiencing delivery delays due to the holiday rush, tell your customers. Apologize for delays and let them know what you're doing to fix it. They'll appreciate the honesty.





08

## Schedule regular check-ins

Regular check-ins with your team are a smart idea all year round. Schedule daily or weekly team meetings where you can discuss challenges, share updates, and adjust strategies on the fly. [Agent happiness is key to customer retention](#), so invest time in coaching and caring for your team to enhance the agent experience.

Proactively establish a check-in routine in advance so it's already baked in before the busy season. You'll keep your team in alignment, and have the chance to solve issues before they grow out of control. By the time peak season hits, your team will be used to 1:1s and team meetings, and ready to swiftly respond to evolving needs during the seasonal rush.





# Get your team ready to go!



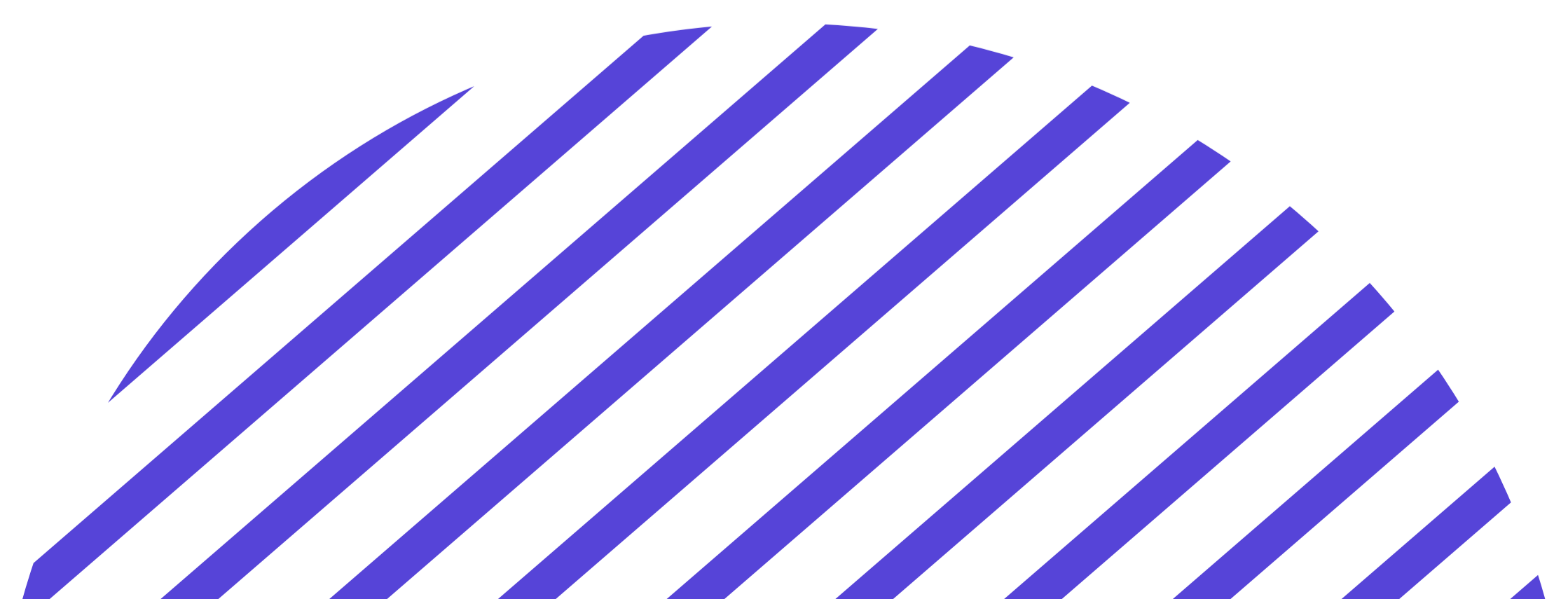
Rather than thinking about peak season as something you only tackle once a year, use preparations as a chance to build a more agile and resilient team year round. That way you can enter each high-demand period with a confident, efficient team that's ideally placed to keep your customers happy.





# Your customer service checklist for peak season rush

- 1** Review past performance data
- 2** Set clear goals and KPIs
- 3** Train and upskill your team
- 4** Update your knowledge bases
- 5** Implement and optimize AI tools
- 6** Enhance your multi-channel support
- 7** Communicate with your customers
- 8** Schedule regular check-ins



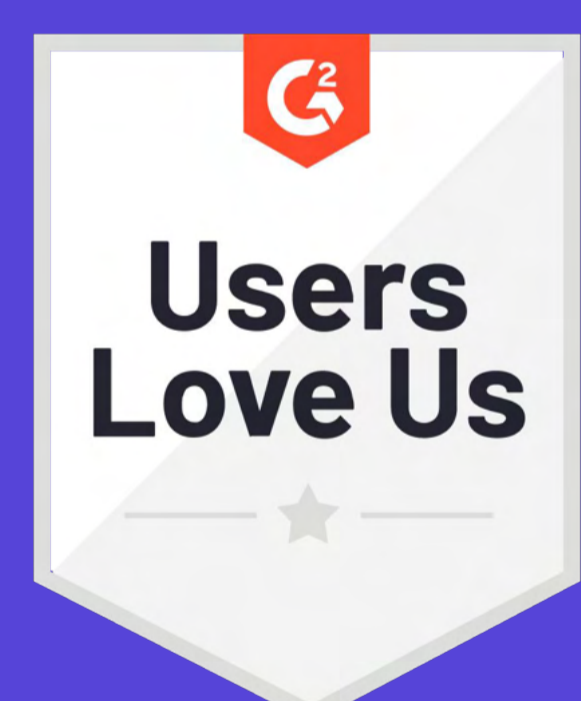




Dixa enables companies to deliver customer service as it is meant to be. We help customer service leaders to create effortless experiences for customers and teams that unlock loyalty. Dixa's Conversational Customer Service Platform combines powerful AI with a human touch to deliver a highly-personalized service experience that scales.

Our dedicated customer success team ensures you are up and running quickly. Dixa powers more than 30 million conversations a year and is trusted by leading brands such as Interflora, On, Wise, Deezer, Rapha, Too Good to Go, Hello Print, and Wistia.

Learn more by visiting [dixa.com](https://dixa.com).



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