



INNOVEST SME
Accelerating Small Business

A woman with curly brown hair, wearing a light blue blazer over a white top, is smiling broadly while wearing a headset. She is holding a blue pen in her right hand and is seated at a desk with a laptop. The background is a bright, modern office setting with a potted plant.

Customer Support Essentials

Rick Chisholm and Tala Chisholm

COPYRIGHT NOTICE

Copyright © 2018 by Innovest SME

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law. Permission requests should be submitted to the publisher in writing at one of the addresses below:

30/192A Kingsgrove Rd
Kingsgrove, NSW 2208
Australia

Phone: +61 2 8007 2907

E-mail: admin@innovestsme.com.au

Website: www.innovestsme.com.au

CONTENTS

	Preface	5
1	What Is Customer Service?	8
2	Challenges	14
3	Email	20
4	SMS	26
5	Webchat	32
6	Multi-Channel Apps	38
7	Support Ticket Apps	44
8	Documentation	50
9	Feedback	56
10	Be Proactive	62

*Customer satisfaction
is worthless. Customer
loyalty is priceless.*

JEFFREY GITOMER

PREFACE

Technology is always changing – and always improving. Once customer support was only offered by calling a 1-800 number and talking to someone over a line. But these days, customer support can be done over a variety of methods, including text messages and webchats. Your customers are always changing and so is the technology they use, so make sure you're keeping up with both!

*Go beyond merely
communicating to
'connecting' with people.*

JERRY BRUCKNER



WHAT IS CUSTOMER SERVICE?

Customer service is a general field that involves assisting customers in a range of issues, such as purchasing, troubleshooting, installation and even disposal of products or services. Customer service is designed to focus on the customer and how they can benefit from your product or service, so it's important to do your part in the delivery.

SUPPORT VS. SERVICE

In many companies, customer support and customer service are often mistaken for the same thing. While they are very similar, support and service do have some variations. Customer service generally refers to a type of service the customer received before, during or after a sale. This can include choosing a product/service, being the cashier and even packaging your items. It's the service of the industry. But customer support goes beyond just the sale of the item, but focuses more on the customer's selection, use and satisfaction of their product. Support aspects often include help with product selection, installation and handling any problems that may come up later. The term service is used more for employees that do something for you, such as taking a returned item. But customer support is designed to ask why you want to return the

item, ask if they can do something to fix the problem, and then accept the return if nothing else can be done.

WHO PARTICIPATES?

When it comes to customer support, everyone in the company participates. After all, customer satisfaction is up to everyone. Within every company, there is typically some form of employee process or chain of command to follow. Customer support often begins with a 'front line', or a set of agents a customer can reach out to for support at any time before, during, or after a sale. A common example would be agents in a call center or agents that speak with the customer over webchats and emails. If the agents are unavailable or unable to help, a team lead or customer lead can take over. If leads are not available, manager or directors can step in. No one is above providing customer support to customers that need it.

METRICS

Customer support metrics can cover a broad range of categories. The goal is to identify areas that work great and utilize them, while also finding areas that are lagging so they can be fixed. Many companies will break down and divide customer support metrics into different categories and areas of interest, but some of the basic levels to start with include team level metrics, individual agent metrics and then the case or assignment level metrics. Team level metrics monitor and evaluate how the company team performs as a whole, including overall response time and customer satisfaction. Individual level metrics focus on the individual agent, and

focus on aspects such as the case load completion rate and their interactions with the customer. Case level metrics focus on the actual problem itself and how agents input them, resolve them or the amount of time spent on a case.

Three main areas of metrics:

- Team level metrics
- Individual level metrics
- Case/Ticket level metrics

TRENDS

With the use of technology on the rise and even becoming a household necessity, the trends in customer support are shifting toward how companies can help their customers in the electronic world. Common trends that are already taking hold include using mobile applications for agent interaction and companies creating self-service or Frequently Asked Questions (FAQs) forums for customers. While it can be difficult to predict trends, many companies choose to start trends of their own and find new ways to support customers that are sure to catch on. Trends can cover any area of customer support, such as future agent training, tools available to the customer, the effects of social media, or even the potential for competition in a set amount of time. Since customers are always changing, the support they need changes too – and so do the trends.

PRACTICAL ILLUSTRATION

Zach and Pearl were in training at the customer support center of Ragsdale Fashions. From the beginning, Zach and Pearl learn that the customer support department is much more involved with their customers and go beyond mere customer service. Pearl took notes of some of the upcoming trends the company was looking into for the next year, such as self-service tools and how employees can assist customers with easy returns. Zach liked the philosophy that all employees participated in customer support and that everyone played a part. Before the meeting ended, they were told about the variety of metrics used to calculate the company's customer support efficiency as well as their success and fail rates. Zach and Pearl knew they would need to learn a lot more before their first day on the floor.

*The greater the obstacle,
the more glory in
overcoming it.*

M O L I E R E



CHALLENGES

Customer support can present a wide variety of challenges, to both the company and the customers. There is always pressure to deliver better customer support, and with that come more challenges all the time. It's important to anticipate the challenge your company can face in this new age and be ready to face any problems that may come up.

CUSTOMER CHALLENGES

Customers should always be a top priority in any company. But they can also be some of the biggest challenges that employees can face. On a daily basis, employees can face customers that are rude, angry, demanding and just plain argumentative. On top of that, customers can be especially challenging when faced with new prospects and have to do things a little differently. With new forms of customer support, such as webchats, mobile apps and email tickets, customers can become more frustrated if they aren't sure how to use them. Employees should be skilled in all media of customer support so that they can assist customers through different agents of support. Employees should be prepared for any number of questions and inquiries from customers and anticipate ways they can help and offer support.

CRISIS

Every company can have their own set of crises. When technology is involved, it can add to the list. The thought of a crisis occurring on your watch can make any employee anxious, but they can – and do – happen. Crises can include a power outage, servers crash, security breaches, or even simple dead batteries. These crises can cause disconnect from customers, slowed or altered progress, and information leaks, which can cause massive problems between your company and your customers.

It's important for every company to have some sort of crisis communication plan that outlines what employees should do in different situations and how they can alleviate customer panic. The plan should also include alternate means of communication if certain methods crash, ensuring that the flow of communication doesn't stop.

TICKET BACKLOGS

When orders and requests start pouring in, they can seem overwhelming at times. Sometimes a company can find that they have more tickets for service than the manpower that can handle them. Whether it's by email, chat request or even app message, this can create a backlog, which can make customers frustrated or feel as though they are being ignored. Typically, customers expect a response back within 24 hours, so it is important that they at least feel acknowledged and heard. Every company should have a response team ready and prepared to relay information back to the customer. Even if the ticket can't be resolved right away, the team member can let the customer know their request was received and

that it is being handled by someone. This assures the customer the ticket is being handled, while also buying time for someone in the company to work on it and resolve the problem.

END RELATIONSHIP WITH CUSTOMER

Some customers are not a good fit for your company. Whether you're unable to help them with their needs or that they simply do not work well with your staff (i.e. angry or belligerent customers), some customer relationships have to be cut off. But the challenge is accomplishing this without insulting or belittling the customer, while also making sure your company doesn't leave a bad impression for future clients. If this can't be done over the phone, send a well-constructed email or app message so that everything is laid out and clear. Apologize for your company being unable to help them and thank them for the time they invested in you. Offer them an alternative, such as a refund or give them a name of another company they can try. Even though you've ended the relationship with this customer, you want to be sure to keep the door open for future customers with your great customer support.

Remember when ending customer relations:

- Apologize
- Re-focus the situation
- Offer other alternatives
- Do not pass blame

PRACTICAL ILLUSTRATION

Mary was training to work in the support center for XYZ Publishing. Her manager, Bryan, was training her on the email and webchat systems they use to communicate with customers. During one segment of training, Bryan told Mary of some of the challenges and difficulties they can face with the new forms of contact. He first told Mary how customers can be very challenging, since many of them can become angry or will be very confused when they contact the support center. But Bryan reviewed with Mary their response protocol, which helps customers feel acknowledged and keeps the tickets from backing up. He also showed Mary where they keep the emergency communication plans, in case something serious happens, like a power outage or if a server crashes. Mary felt overwhelmed by all the information, but felt it was better to address the challenges now than to wait until they occur later.

*When someone sends
you an email, they are
knocking on your door.*

JAMES COMEY



EMAIL

When email was first introduced, it was viewed as an informal and casual way to contact family and friends. It was not seen as a business tool or a professional way to contact clients. But email has come a long way and is now a mainstream method for any forms of contact – both business and personal. But email has now formed its own set of etiquette, so businesses must learn to follow these guidelines in order to keep their emails professional, yet functional, with customers.

FORMAL YET CONVERSATIONAL STYLE

Although emails can be seen as a casual format of conversation, it is important for companies and businesses to keep their emails formal and professional, but also portray them in a conversational tone so that they are more relatable to the reader. Conversational style is written in first person, so when you type back to the customer, use phrases such as “I” and “we”. Use a greeting that has their name in it and sign off giving your name. It portrays to the customer that a live person is speaking directly to them and that the email they got back wasn’t some type of form letter or automatic response.

Tips for formal yet conversational style email:

- Use a greeting with their name
- Use “I” and “we”
- Repeat back to them what was said
- End with your name

SCRIPTED YET AUTHENTIC

Many emails or email responses will need to be sent to customers, and many of them will sound very similar, if not the same. Emails can be used as an automatic response as long they are scripted properly. No customer likes the typical “Thank you for your request – we’ll be right with you” response, which is equivalent to hearing your call is very important to the company and you’re the next caller in line. Instead, create a script that has some automatic key phrases that need to be sent, but are still customizable to the individual customer. Again, always use their name in the greeting and give yours when signing off. Many companies use an automatic email to respond to customer questions or inquiries, and a script is a good tool to use for these emails, but it is important to keep the emails personable and customer-friendly.

EXPLAIN INFORMATION CAREFULLY

The words we use in an email can either deliver the point, or completely confuse the reader. Not to mention that emails cannot convey any form of tones or inflection, so sometimes information can be received wrong

or information can be missed. When using email to communicate with customers, take time to explain the information carefully and thoroughly. You may even need to repeat some things you've talked about before. Remember, the customers are not your coworkers, so they may need to have things explained simply and clearly. You have to explain things to them as if they are learning it for the first time. Don't come across as insulting or insensitive, but instead explain information carefully so that the customer is informed yet still welcome to come back with any more questions or problems.

RESULTS

When choosing to use emails as a means for customer support, the bottom line is how the results look. Look at your means of customer support and determine how using email has made things better or worse. Are customers satisfied? Have they gained more from being able to email the support team? Or are some customers unhappy with it? Do they feel disconnected from the company? Are there other methods you can offer them? Look into if tickets are being resolved and if customer needs are being met by using email services. If they're not, that doesn't mean you have to do away with the service, but simply find new ways to improve on it. However, the results come out, use them as a tool to help improve your services and gain more customer support.

PRACTICAL ILLUSTRATION

Olivia is working with Jacob at the Pretty Paws Animal Grooming Center. Olivia's job is to answer any customer questions or requests that come through the email system. She ensures that when an email is received, she sends an email back confirming that their message was received and that someone would help them shortly. Jacob helps Olivia build scripting templates to use in email letters and responses. He also helps Olivia ensure that she's addressed each customer's needs and has explained all the information to them carefully. Periodically, Olivia and Jacob talk to their clients and ask how they like the mail service and if they can improve in some way. Any responses they get they pass on to management for review.

*Texting has added a
dimension to language use.*

DAVID CRYSTAL



SMS

SMS (short message service), also known commonly as texting, is not new technology, but it is a newer tool that businesses are starting to use for their customers. Customers can feel as though they are getting one-on-one service from an agent and can do so 24 hours a day. Allowing customers to text your business gives them the freedom to communicate with your agents, even if everyone is tied up to the moment!

CONVENIENCE OF TEXTING

Texting has become one of the most convenient ways for people to communicate. It allows the user to send messages and start conversations at any time of the day and feel as though they are getting real time responses and reactions. The customer doesn't need Wi-Fi and can use almost any device to send a message. When customers have a problem, less than 20% of them are likely to make a phone call and speak to a live person, for one reason or another. But texting allows the customer to write a quick note and send it off to an agent, and wait for them to come back to them. No waiting on hold. No boring elevator music.

APPS AND SOFTWARE AVAILABLE

While any cellular phone has built in texting abilities, but any mobile device can install texting apps or forms of software. There are hundreds of apps available on mobile marketplaces, such as iTunes or Google Playstore, so businesses have a wide variety to choose from. Every app has different features, including contact storage, automatic reply features, as well as photo messaging options. Additionally, every texting app charges different rate for different services and has plans that cost fines annually or per units of usage. Some apps can carry over to a desktop or laptop computer, which allows more versatility of texting between devices.

Common text message apps for businesses:

- WhatsApp
- TextSecure
- TextMe
- TextNow
- Viber

INFORMATION TO COMMUNICATE

As we all know, nothing on the internet can be erased or taken back. The same goes with text messages. While they can be erased from a device, they are always able to be obtained from an internet server or through data mining. With that in mind, there are certain kinds of information that should not be sent through text messages due to security

or personal risks. Information such as passwords, payment information, personal information such as date of birth or social security numbers, or even customer contact information should not be sent through text message and should be saved for more secure lines, such as telephone communication or encrypted emails. Conversational texts or texts asking for information are fine to transpire without problem, but if texts start to progress toward personal or even account information, the agent should seek more secure methods of communicating with the customer.

PROFESSIONAL COMMUNICATION THROUGH TEXT

Text messaging is commonly seen as a casual form of communication. In order for texting to be used as a business tool, it is important to follow some guidelines to make this communication more professional. First of all, do not use abbreviations such as 'lol', 'brb' or 'u'. Remember that texting usually only allows a certain number of characters, so keep messages fairly short, but avoid answering in only one or two word answers. Only use text message to communicate with customers that have given you consent to do so and stick to business content only. Don't try to share the latest cat video or talk about your cousin's upcoming wedding. It's alright to be personable and friendly in your texts, but remember to remain professional as well.

Keep it professional:

- Do not use abbreviations
- Keep it short
- Watch your tone
- Always get permission

PRACTICAL ILLUSTRATION

Fiona was training with her new manager, Peter, at Sky Waves Cell Phone Services. Today, Peter was going to show Fiona how the company communicates with customers via SMS, or text messages. Peter explained to Fiona that it makes it convenient for customers to contact the support team because they can text anytime from anywhere. Next, Peter showed Fiona the apps the company uses on the mobile devices for customer texting, and showed how it carried over through software on their company computers, so texting can be done from any device. Lastly, Peter told Fiona about the company guidelines for what is said – and not said – in text messages. He stressed to her that while they must always be friendly with the customers, it is important to always be professional with them.

*The internet is
transforming society
and shaping the future
through chat.*

DAVE BARRY



WEBCCHAT

Webchats, sometimes simply called live chats, are a tool used to communicate in real time over an internet connection. Webchats can be done over text/typing conversations, often seen as a chat box, or can be done by video, which offers live video chats any time! Whichever method you prefer, both are becoming a popular business tool that can offer better customer support.

PERSONALIZE

Webchats are conducted through a one-on-one basis, so it allows for the agent to personalize the chat to the customer. Ensure your webchat widget or application has your company name or logo present so customer know they are chatting with a real agent from the company. Personalize your chat with your actual agent name, not a cutesy or funny screen name or user name. Make the webchats more personable by addressing the customer by name and greeting them. Many webchat apps or widgets can be personalized for both you and the customer, so have fun with it!

APPS AND SOFTWARE AVAILABLE

There are many different apps and software available to use for webchat. You can get them for the computer and smart phone and at many different costs and options. Shopping for the perfect webchat application; one that works for both you and a majority of your customers, is like shopping for a home. You must weigh the pros and cons for each, as each one is different.

Skype was the number one webchat application for a very long time. Low-cost, easy to use, it had the basics for video chatting. Apple Facetime is also a new up and coming webchat application. As video conferencing and webchats for customer support become more and more popular, there are many new providers. Microsoft Windows is now promoting their version, Web Chat 10. WeChat and LiveChat are also premium business webchat providers that are recommended that you consider.

REAL TIME SUPPORT

Real time support for your customers is a service now offered by many companies. Clients are looking for instant assistance. Customer's with the ability to reach out and contact someone immediately for assistance is often times a huge selling point. Not having to wait 48 hours to get a response from the company is worth a lot to many customers. The feeling that the company cares for its customers is important to building a long time client.

With real time support, you take care of the issues immediately for the customer, hopefully. This will cut down on the number of customer service tickets and emails streaming in, you also tap into a data source. Real time support can gather information on which customers are using the service, why they are visiting, and the results of the visit. Real time support can work for both the customer and the company.

ETIQUETTE

Anytime that you are providing customer support, the first rule is to put yourself in their shoes. By the time they contact you, they are out of options. They have a problem that they probably tried to fix already. They are more than likely frustrated. During your webchat with the customer, answer their questions simply and directly at first. Then if there is still a question, add more details at that time.

All of the rules of etiquette for a professional interaction are the same for webchats, plus a few more. Polite, positive, etc. Just like communication via memo, email, letter, etc. you must be careful not to offend the other party. It is hard to read the other person's emotions and inflections via these methods of communication. Sarcasm and jokes rarely translate properly in these situations. It is best to avoid them.

PRACTICAL ILLUSTRATION

Ginny is training Steve in the customer support department. She needs to introduce him to the webchat part of the job. Steve has had some previous experience with webchat, but Ginny needs to train him on the

company's software and their policies. She starts with explaining all of the different options that the webchat software can perform. She also explains how much it means to the customer to have him there to answer their questions, often times in their time of utter frustration.

Ginny advises that Steve sets up his webchat with his own name, not his World of Warcraft screen name. It will gain the confidence of the customer if he uses a professional screen name. She also advised him to not use overlays and templates that are not of the utmost professional appearance. No fairy dust. Finally, Ginny had Steve read the etiquette policy as required by the company. It just states how things get misinterpreted and to use professional conversation at all times. Steve signs the form and Ginny has him take his first chat.

*Here is a powerful yet
simple rule. Always give
people more than they
expect to get.*

NELSON BOSWELL



MULTI-CHANNEL APPS

What are multi-channel apps? It is defined as using many different methods to reach the customer. Whether it is a webchat in customer service, or a shipping confirmation in the form of a text message to the customer, there are many different customers, with many different methods of communication, for many different reasons. Technology has tuned into these new methods and combined these methods into applications that handle them all.

DIFFERENT MULTI-CHANNEL APPS

Multichannel applications and providers are changing every day, just like the internet they command. There are numerous different apps available. Companies are able to bundle together all of the necessary platforms to maximize your customer support. Microsoft, Oracle, Zendesk, Freshdesk plus all of the major internet providers like Comcast and TimeWarner offer top of the line customer support packages. Depending on the size of your company and its needs, the packages could include:

- Call Center
- Social Media
- Instant Messaging

- Text
- E-commerce
- Issue tracking

Pros

There are many “pros” associated with the use of a multichannel customer support system. First, it offers your customer options. They no longer have to wait in long call lines, listening to a track over and over, and waiting for someone to answer their question. With multichannel support, they can text, email, and webchat with the company, anytime of the day or night. This option helps to draw in customers that are looking for this kind of support and also begin to build a positive relationship with the customer.

Many of the apps that are available will save labor hours within the company. Being able to track issues, track usage and customer satisfaction is now included in the apps and invaluable to the company. Analytical apps and tracking apps are just as popular as the webchat and text messaging.

Cons

As great as they sound, multichannel support apps do have their downfalls. Anytime that you use the internet and computer systems, you are at risk for outages, security, and the occasional act of God. Power outages, service outages, weather outages, they will all adversely affect the service that the customer receives. Your company will need to invest in specific plans and policies of the plan of actions when this occurs.

The biggest “con” to the use of a multichannel customer support app is the cost. There is a considerable up front cost to implementing a system such as this. The cost to build or purchase the actual app. But then there is the installation, and the support staff necessary to maintain and update this system. Finally, there is a cost of the employees to perform these duties, and also their training.

Lastly, security. The use of these types of systems adds a layer of security necessary anytime there is internet access to your company.

MAKING A DECISION

Shopping for multi-channel software to deliver your customers the communications they need can be overwhelming. There are so many different options and bundles offered by many different providers both large and small. Once you decide to invest in this route of communications, you then have to choose which one.

The first and foremost thing you should do is to know your customer. What do your customers want? Have they asked for something in specific like webchat? Text messaging? Another thing you should consider is your target audience. Would your audience not use any particular channel? For example, if you are providing orthodontics, you probably want to install a webchat option for your younger target audience.

PRACTICAL ILLUSTRATION

Tom and Katy are both business owners in town. They are attending an IT trade show, in hopes to find some new ideas for attracting and keeping customers. Tom owns a dentistry business and Katy owns the local florist business. During the break after the multi-channel communication seminar, they compare notes over coffee. Tom's target audience is the older generation in town, so he doesn't believe that the cost for webchat and text messaging would be profitable. He also does not have many uses for customer support via the internet. However, Katy is really interested in being able to send promotions and sales to her customers and offer the webchat option to customers who want to see the product before delivery. She thinks this option could also attract new customers, especially out of town.

*In the world of internet
customer service, it is
important to remember
that your competitor is
only a mouse click away.*

DOUG WARNER



SUPPORT TICKET APPS

What are support ticket apps? Those are the apps that allow customer to submit their issues and concerns via internet. Support tickets apps are similar to multichannel apps in that it connects the customer to the company 24/7, but only in the email form. Due to their smaller size and less capability, it is much more economical, especially for a small company, just beginning to implement more IT systems.

DIFFERENT SUPPORT TICKET APPS

Support tickets usually include an app that creates and maintains a “team” inbox that all customer emails are funneled to for a much faster response time than the old fashioned phone call. These systems also can include a tracking system to track the tickets submitted and the response over a period of time. This also aids in searching past tickets.

Support ticket apps can also simplify the process by attaching everyone involved to the ticket. For example, the customer sends an email and then leaves a Facebook post. These apps can link the marketing team and the customer service team to cut down on redundancy. Another app that is offered will allow the customer to not only open their own support ticket, but also allow them to track the ticket as it travels through the system.

Pros

Using a support ticket system in your help center, will streamline operations, cut down on repetitive actions and better support your customers and their needs. Customers can open a ticket and with some options track that ticket through the process. This ticket can then have documentation connected, and also connect any social media or reviews given by the customer in regards to the open ticket. For example, if a customer opens a ticket, and then follows with a Twitter post, then two are connected without a repetitive action for the post being opened. Customer support team members can better attend to this customer when they have all of the information available to them.

These ticket systems can also track issues that are common to different customers. They can also track customers and all of the tickets that they open. This software even has options to report on tickets, ticket times, and the amount of time it takes each team member to close tickets assigned to them. This can better streamline the customer support operations for your company, saving time and money.

Cons

Obviously there are reasons that this system is not profitable for all companies. As always, cost is a component in decision making. Is the cost worth the benefit for your company? Do you have the need for such a detailed system?

Another glaring consideration is that many companies do not have a need for such a detailed support ticket system. This type of system is geared towards those companies that have the need for customer opened tickets and customer tracking of the ticket. Companies with large support departments that handle many different channels of communication are primed for this type of system. If most of your customer complaints are handled in-house with returns, then this is not the system for you.

MAKING A DECISION

Whether you are choosing a minimal amount of options, or you are looking at purchasing all the options, there are several questions you should ask yourself before making a support ticket app purchase. Depending on the amount of money you want to spend and the size of your support team, there are specific questions that you can address by knowing your customers. What are they looking for in customer support? What is your competition using?

Make sure that you ask the opinion of your support team. No one knows what would be useful, but the employees that are doing the actual job. What would they like to see from a new system, that would cut down on time, improve service, and keep up with technology's fast pace? Asking the customer and your employees in a quick survey would be a great idea, before making the purchase. Often time, providers will allow a trial period so that you can actually try the new app or software for a period of time to make sure that it fits your situation.

PRACTICAL ILLUSTRATION

Bob needs to add a customer support ticket app to his business. He asks Carl the customer support manager to weigh in on the consideration of which system to choose, along with Tina, the IT manager. Bob explains that he wants to streamline the process of support tickets. Tina suggests the system that links all of the activity that relates to a particular ticket. This will cut down on different reps working on the same ticket. Carl reports that customers have shown interest in being able to track their open tickets as the process progresses. He would also like some analytical tools to report on average times, open tickets, so that he can better train his crew. Bob and the team shop around and find a provider that provided all the options they wanted at a price the company could afford. Bob then signed up for the free trial so that the support team could try the system before the final purchase.

*I'm looking for the best
practices - constantly.*

MILLARD DREXLER



DOCUMENTATION

Documentation is so very important and so very boring often times. It needs to be accurate, but not overly complicated. It should be written in context, but also detailed enough to be useful. Documentation is essential to an efficient customer support department. This chapter will cover what to document to be effective, how to prepare the documentation and also how to keep that documentation for future use.

WHAT TO DOCUMENT

This can be a daunting task. What to document and where to start. Break this big task down into do-able smaller tasks. First, start with the obvious and document the product/service and how it works. Document everything about how it all works. Think of it as standard operating procedures. Don't forget to consider the customer support tickets that you have already received.

Second, you want to document the problems that customers have been encountering. What has been standing in the way of success for the customer? Document the restarting process for example. Make sure that all of your documentation is in logical order, clearly explained in the customer's language, and detailed in nature. The more you include in the

documentation, the less that the support rep will have to guess, and the faster the customer's problem is resolved.

USING TOOLS

There are many different tools and apps to aid in your production of a world class documentation library. One tool produces many different “editions” of your documentation, to be used in the cases where different customers have the same product but different terms. They would need access to the same documentation, with their contract specific details. There is also a documentation tool available that allows multiple ways to access your documentation. For example, customer support reps, production staff, customers doing self-service, etc.

Including diagrams and screenshots is always beneficial to explaining the information thoroughly. However, often times, screenshots have sensitive information displayed. There is a tool now that will blur out this sensitive information so that you can use an authentic screenshot. There are many different tools to choose from, and many will work for all sized companies.

PREPARE DOCUMENTATION

You have all of the documentation articles written. You have covered all of the necessary areas. You are now ready to send it out into the world. Stop! Do not just jot a few ideas down and then post it for all to see. You need to prepare your documentation into a presentable and usable form. Try to avoid the technical industry jargon and keep it simple.

The first thing you need to edit for in your documentation, are gaping holes. Make sure that you are smoothly moving from step to step, with all of the supporting information to successfully complete the task. Secondly, make sure that you haven't overloaded your documentation with information. Just like too little, too much information can overwhelm the customer.

RETAIN

Your documentation looks wonderful and it is ready for use. Your next step is to retain your documentation for your customers and support team to view. Publishing your work will be the perfect way to accomplish this. There are quite a few choices for software to accomplish this feat, according to the people that will be accessing the information.

What format will your documentation need to be? Many times, different formats are necessary so choose a publishing tool has that capability. Often, a company will print out hard copy of the documentation as well as an online version to be accessed from the rep's screen. But have you considered a website display? Converting your documentation into code can be completed with a publishing app.

PRACTICAL ILLUSTRATION

Jim is charge of documentation for the customer support department. He feels overwhelmed so he asks Tom to help him. Tom has experience doing this at his last job. Tom tells Jim not to get excited, just write one at a time, in sequence, in small tasks. Tom says to begin with the basic

procedures that describe how to successfully operate the product. He tells Jim to be detailed, but don't talk over the customer's head. He also recommends that he thoroughly edits and revises the information after writing. It must be understandable by the customer.

A couple of weeks later, Jim has a wonderful documentation library set up, and is ready to send it out to be used by the customer support department. He purchases publishing software that formats all of the work for all of the different places Jim wants the text to be seen. The general manager sees website form, and gives Jim a bonus.

*We all need people who will
give us feedback.
That's how we improve.*

BILL GATES



FEEDBACK

Feedback from the customer is extremely useful to many different departments of the company. Feedback on the product, on the sales rep, on the shipping, and even feedback on the customer support that the customer received after the purchase, are all valuable tools that can easily be collected for later analysis. There are many ways to collect this most valuable asset – data from the customer. There have been many advancements in this area, especially with apps and software.

SURVEYS

Surveys can be conducted in many different ways, and in regards to many different subjects. In this day of internet, there is of course, quite a few different survey apps. These apps can be added to the end of an order, or even to the end of a customer support action. Many times they ask the customer to rate the service or product on a scale of one to ten. They may also have a section for customer comments. These apps allow for customer information and their responses which makes more detailed data. These apps have options for conversation between the customer and the company, and options for analytics that will help manage the customer data.

BOXES

Feedback boxes are apps that are responsible for the small text boxes that you find at the end of an online interaction. For example, after you push the purchase button, there is often times a feedback box asking if the process was easy, if there were any problems during the interaction, and if you have any suggestions. These feedback boxes can be easily added to any interaction, from any department. By adding feedback boxes to the bottom of customer support pages, such as opening a ticket, or requesting assistance is helpful to maintaining a more user friendly environment.

ANALYTICS

What is the purpose of collecting all of the valuable feedback, if you aren't going to use it? There are many analytical software aimed at analyzing the data collected from feedback, surveys, customer comments, etc. There are also options for reporting these analysis. Charts, graphs, and dashboards are available to display the trends that are occurring in real time. These systems can collect all of the customer data, analyze it and keep you up to date on what your customer are saying. Analytics can show the changes that need to be made, hopefully before it's too late.

USABILITY

Usability is not focused on one single issue. Usability focuses on the overall user experience, while they are interacting with your company via your apps, your website, etc. Usability asks questions like *"Is the page*

visually appealing?” and “Is the website confusing to the user?” There are several ways to evaluate the usability of your systems. Surveys, focus groups, and early testing can show you where your customers have problems with their online experience.

Evaluation points:

- Effortless navigation/well designed
- Ease of learning for first time users
- Efficiency of the site for the user
- Memorability after leaving the site
- Error frequency while using the site
- General user satisfaction

PRACTICAL ILLUSTRATION

Bob and Tom are in need of updating their customer support. It has been a few years since the website was launched and their other customer support apps are starting to look a little tired in comparison to the competition. Tom suggests that they ask their customers what they would like to see change in the interactions that they have online. He begins to formulate the questions that they have for the customers, while Bob researches some of the ways that they could reach out to the users.

Bob decides they could add a short survey at the end of the interactions that customer have like orders, and support tickets. He also asks Tom if

he thinks that feedback boxes may work also. Tom agrees and has the questions they will ask. Tom also adds that they will be able to take the data and not only analyze the data returned, but also use it to refine the sites usability. Tom further researches and also finds analytical software to aid in this also. They start collecting customer data immediately form the order page and find out their site is hard to use. They make the changes and have received much more positive feedback.

*Recast your
current problems into
proactive goals.*

SUZE ORMAN



BE PROACTIVE

Be proactive. In customer support that sounds difficult. “Know the customer’s problems before they tell us they have a problem?” Essentially yes. Working to stop problems before they start can cut down on support tickets, customer questions, and frustration on both the company and the customer’s parts. Using research to discover potential problems and correct them is an example of being proactive, as is providing the support to the customer before they are asking for it, gives the customer security in the company that they are putting their money.

RESEARCH ANALYTICS

You have all of the customer data, collected from surveys, feedback boxes, etc. Now what? All of that data needs to be analyzed. You need a software that will take all of the information and put it into a readable report. But first you must understand your customers and their circumstances. Was there a power outage that night in the area? Are there many customers that are all having the same problems? Knowing the circumstances for the data can be helpful in the analysis.

Research analytics are specifically designed to monitor the customers. They aren’t simply business intelligence software products. They monitor the number of tickets, the specifics of the tickets, the satisfaction levels of

the customers, and other details about the customers. Dashboards, pie charts and reports are a product of these analytical software tools. From these results, decisions can be made about making necessary changes.

DISCOVER OPPORTUNITIES

Now that you have the channels of communication open between you and your customers, you can easily find opportunities to reach out to them, before they reach out to you. Once you have the customer online for their issues and concerns, you have an opportunity to also speak to them with your concerns also. For example, after taking care of the customer's issue ask for a referral, positive review or even answer a few questions about the service. While you have the door of communication open, take advantage of it and ask if there are any suggestions that the customer may have. Ask if they would be interested in email or text communications. These are all communication methods for coupons, sales, and promotions in the future that the customer may be interested.

PREVENT PROBLEMS

Problem prevention, that takes some work. To do this, one must pay attention to what the customer is saying, both on your site, and in social media. Being in tune with your customers and their experiences can be the difference between a couple of product fixes and a full blown recall. Analyze the customer support tickets. Are there trends and similarities that could be avoided? Could a simple fix now stop hundreds of unhappy customers later? Could you have seen this coming?

Often times, a customer will vent and air their grievances in the social media forum before they tell your customer support team. Monitoring sites like Yelp can clue you in to what your customers are really thinking about your company and its service. What is the Twitter world saying about your company? Fix small issues before they become full blown problems.

PROVIDE SUPPORT BEFORE PEOPLE KNOW THEY NEED IT

You don't want to be reactive to the problems of your customers; you want to have their solution ready for them, before the problem even exists. Providing many different channels for your customers to communicate with you, gives the customer a feeling of support. It builds a relationship with the customer that can continue into the future.

Often times, knowing that the company has a great customer support system, and are easy to communicate with, can make the difference in purchasing a product from you, or from your competitor. Your company does not want to be the one, last in the world of communication and technology. Stay up to date on the trends in communication and listen to your customers and their suggestions.

PRACTICAL ILLUSTRATION

Diane is the new customer support manager. She and Kelly, the supervisor, are discussing the direction that Diane would like to see the department move forward. She has always led by being proactive, not reactive. Kelly advises that they can use their customer support software to monitor

trends in customer issue and in turn they can report these issues to production. Diane likes this approach and adds that they can also use the internet to listen to what customers are saying about their product and their support services.

Diane discusses different routes of reaching the customer. Using the support communication to further conversation with the customer to include other communication possibilities like sales promotions, coupons, etc. A customer support ticket can be more than just fixing the issue at hand, it can be an upsell too. Diane assigns Kelly the task of surveying the employees as to their opinions and suggestions to also be analyzed along with the customer's feedback.

*Customer success
is more than just delivering
service or support.*

LINCOLN MURPHY

CLOSING THOUGHTS

- **Alan Weiss:** Ask your customers to be part of the solution, and don't view them as part of the problem.
- **Richard White:** Focus more on building in easy ways for customers to contact you.
- **John Russell:** The more you engage with customers the clearer things become and the easier it is to determine what you should be doing.



Rick Chisholm made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of \$300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.



Tala Chisholm is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.

.....

Phone: +61 2 8007 2907
E-mail: admin@innovestsmc.com.au
Website: www.innovestsmc.com.au