12 tips to help you deliver great customer support and keep your customers happy
The Problem

Customer support is an essential yet tiring and time consuming aspect of running any business. Today more than ever it's essential to provide great customer support. Your customers are talking about your company and they'll often not hesitate to comment about you if they experience poor customer support.

The Answer

Today you need to think about customer support in a whole new way. You need to manage your customer support to turn each customer into ambassadors for your products or services. You want them generating word of mouth referrals and posting positive comments about your company because they've had a great customer support experience.

The only way to achieve this of course is to provide the best possible support you can to each and every customer. This can be especially difficult for small to medium size businesses. You may not have the staff to facilitate this so you’ll need to get smart about how you manage your incoming customer support requests.

The goal of this paper is to provide you with some practical tips & ideas you can apply to help your business provide a more responsive, well managed customer support experience. Applying a few practical tips can help turn your customer support into relatively easy, painless process and can quickly result in happy customers.

Why listen to us?

We've managed our own busy help desk and have strived to keep our own customers happy for over 10 years. We are continuously refining our own software and procedures through the lessons we learn from our customers everyday.

We've helped thousands of companies accelerate there existing support resolution process through our own integrated knowledgebase & help desk solution Our solution — InstantKB.NET— includes many of the best practices we’ve learnt allowing you to immediately take advantage of these lessons and offer your customers great support from right away.

The self-service support tools included with InstantKB.NET have already helped thousands of companies reduce in-bound customer support enquires. In some cases as much as 50% saving them thousands of man hours every month.

We hope you would consider our own InstantKB.NET solution to manage your customer support however even if you don’t you will hopefully find some of the tips in this paper helpful and we hope they improve your support.
Your on your way to support nirvana

1 Manage Customer Expectations

Clearly state within all support channels the typical response time your customers can expect a response. If you say you'll respond within 12 hours make sure you follow up on this commitment. Even if you're not able to resolve the issue for the customer with the first response you should acknowledge receipt of the enquiry and let the customer know your working to promptly provide a resolution or answer.

Set realistic expectations based on your company size and available support personal. It's better to tell customers you'll respond within 24 hours and get back to them within 12 hours than to set expectations for a response within 6 hours only to leave the customer wait 12 hours. Be realistic with your estimates and use service level agreements to help manage due dates and enquiry priorities.

The important thing to remember is to be honest with your response times. Don't over promise and under deliver.

2 Consolidate Your Support Channels

How are you checking customer support? If you have several support channels consider streamlining this to funnel all customer support request through a single support channel. Ideally this would be your help desk, company forums or a single email address.

If you do need to use several channels to gather support requests try to use a central help desk or issues tracking solution to capture each new incoming call or request. Then work from this list on issues until resolution. Your help desk or issue tracker should be your central portal to all issues that are currently open within your organization.

Be very clear on your web site or within your documentation how your customers should contact customer support
Divide & Conquer

Delegate clearly defined roles & responsibilities for your support personal. It may sound obvious but we’ve seen hundreds of companies with small support teams wasting time by responding to the same issues or spending time on issues that could have been resolved by first line support.

Your support personal will be more productive with clearly defined roles. They'll be able to apply focus to the tasks they've been assigned to resolve. The most typical support structure is to have 3 lines or tiers of support. This may vary depending on the size and complexity of your organization however you can see a typical support structure below...
First Line Support

Assign this role to your most available support staff. If you work within a small business and find yourself doing lots of customer support outsource or assign your first line support to someone else you can trust. Having someone to assist with first line support can dramatically improve your customer support and take some of the burden of your key employees allowing them to focus on other higher value growth activities.

Notice how we say someone you "trust". Outsourcing your first line customer support to others can save big bucks and many valuable man hours, but be careful as it can result in unhappy customers or loss of business if the support person isn’t fluent in your customers language or doesn’t have the proper tools or knowledge available to help your customer. You should be considered with your first line support choice and choose only those you trust to represent your company.

Your first line support should be checking for issues every couple of hours and responding to, or referring new issues as they arrive. This way your customers receive a personal prompt response and they know your working to resolve the issue. Your first line support will be the first point of contact for many of your customers. They will be responsible for acknowledging & referring complex issues and should be able to assist with many common day to day enquiries.

If you have a help desk system your first line support should be responsible for prioritizing, assigning & organizing issues within your queue. This will allow your advanced line support to quickly identify the issues they need to resolve.

Another good idea if you have first line support is to establish a clear support process. This will enable them to effeetely respond to common questions & route more complex enquiries correctly.

Your first level support activities should include....

- Entry point to the escalation process
- Owning resolution of less complex issues
- Ascertaining the business impact of issues
- Responsible for assigning or escalating for critical situations

Your first line support should be prompt, intelligent & friendly. They are often your customers first point of contact so assign this role to only those that you trust.
**Advanced Line Support**

Your advanced line support personal should be responsible for dealing with more in-depth technical enquiries referred by first line support. Your advanced line support members are often senior technical staff or key product, development or IT staff who can assist with more complex technical problems, complaints, or defects.

Your advanced line support should only work to resolve technical issues for customers. They should not be checking tickets or following up with customers other than to resolve the issues they’ve been assigned.

Once an enquiry reaches advanced line support make sure all related customer support issues are handled by the same support representative. There’s nothing worse than having a disgruntled customer wait on the line, while you look up his "file" and know nothing about the case. If an enquiry requires further investigation you should escalate & assign a technitian. Let the customer know the point of contract for further communication regarding there enquiry.

**Back Line Support**

Your back line support & escalation managers are responsible for ensuring all escalated enquiries (requests not responded to within the agreed SLA timeframe) are dealt with and resolved promptly. Enquiries should only reach back line support once all other options have been exhausted with first and advanced line support. This will minimize distractions to your back end support and allow them to focus on existing problem resolution.

If a customer enquiry reaches back line support we would suggest if necessary assigning a manager for the enquiry to oversee the issue from a holistic viewpoint. The manager is responsible for evaluating the situation, facilitating the issue resolution, and acting as an advocate on behalf of the customer.

**Escalation Account Manager**

- Your advocate during the escalation process
- Responsible for customer satisfaction
- Owns the problem and the overall action plan
- Leads the escalation team

**Business Critical Account Manager**

- Assigned to develop, document, communicate and coordinate the technical action plan
- Ensures solutions and workarounds are delivered in a timely manner
4 Laser Focus

You'll need massive focus when running a busy support department. Keeping on top of all the incoming support requests can often take up much of your time. If you don't apply focus & resolve issues quickly a back log can quickly develop.

It's important to ensure your support staff have a efficient, effective working environment. The goal is to minimize disruptions that come up for your support staff. Periods of focus from your support staff will lead to happy customers and a small support queue.

Defining clear support responsibilities as described in "Divide & Conquer" can dramatically improve your support staffs productivity. They are freed to focus on a very specific narrow set of tasks until they are resolved. If you offer customer support through multiple channels try to assign a dedicated support technician for each support channel. You don't want your advanced or back line support answering phone calls or checking emails. You wan them resolving issues.

If you’re an executive or small business owner and find yourself checking customer support channels several times during the day putting in place a first line support person can save you hundreds of hours every month. As an executive you should be focused on high value activities not organizing and answering first line support enquires.

- Minimize distractions (emails, phone, colleagues)
- Assign specific roles (first, advanced, back line support)
- Use the best software & keep your issues organized
- Assign staff to specific support channels

5 Is that a canned reply?

Don't use canned or standard replies. Or more importantly if you do try to actually address the customers questions and any relevant points. If you have a busy support desk canned replies can save you a ton of time, however use with caution.

There are many robotic style canned replies that will immediately give your customers the impression you've not read or listened to there questions. This can quickly irritate the customer and lead to a poor customer service experience.

Instead, if you must use canned replies try to only use them as a basis for your response. Your should personalize them adding the customers name and addressing the key points of the support enquiry.
6 Your customers don't have a crystal ball

Believe it or not often even if you go out of your way to help a customer they will probably not recognize the efforts you’ve gone to.

It's important to tell your customers about every action you take to help them. This will not only show your customers you’ve taken the time to understand the problem and are actively working to resolve any issues, It also clearly demonstrates to your customer the efforts you’ve made to assist.

You should detail the steps you’ve taken in such a way it will actually help your customer. One approach is to simply list the steps you've taken and research you’ve performed in an attempt to assist or resolve. Let the customer know how long you've spent working on the issue. If you’ve gone to any extra efforts to help make this clear.

If you detail the resolution steps you’ve attempted in your communications your customer will appreciate the detail. This will often suddenly ignite an idea with your customer to help them resolve the problem even if you can’t.

Let your customers know how hard you work for them. Don’t just write “This should be resolved”.

7 Do it Now & Do It Often

The golden rule of great customer support. This sounds so simple. You've probably heard something similar preached in self or productivity improvement books. There is a reason for this. It works. Dot it now and you won't have to do it later or think about it again until your customer responds.

Check your support queue often, at minimum check daily, ideally every couple of hours to keep on top of your incoming support requests. Your customers expect a response today. Not tomorrow.

Make It a rule to always respond to issues when they first arrive. Deal with issues immediately until they are resolved or referred Your customers will appreciate the quick response and you’ll keep your open issue count down.

Even if you can't resolve the issue right away have your first line support personally acknowledge receipt of the issue and let the customer know you are working to promptly resolve the request. If possible provide an estimate response or resolution time to the customer and stick to this.
8 Email or not to email, that is the question

Outlook is great for emails but not customer support. It lacks the workflows, service level agreements and escalation features you'll need to effectively manage a busy support desk. This is even more true if you have a team of engineers.

If you currently manage your customers support via email consider moving to a dedicated help desk solution. There are a number of products available in the market including our own InstantKB.NET help desk.

There are several advantages of using a dedicated, online help desk...

- You can easily share your support issues across your support staff
- You can define workflows & SLAs to better manage support processes
- You can automatically escalate issues if they don't receive a response within the SLA timeframe
- You can identify & manage premium support customers or customers with a support contract
- You can often create articles, FAQs & technical notes to help your customers on a self-service basis
- You have a written record of the issue (no risk of junk / spam filtering causing lost communication)

These are just a few of the obvious benefits. More importantly a help desk will help you separate customer support and will provide a central location for your support staff to work with customers as issues are resolved.

Outlook can often be a significant distraction for your busy support staff throughout the day. If they do need to check email try to schedule this so they only check once or twice a day. Make it clear to your customers they will receive a quicker response to any questions submitted via your help desk and not email.

Your support staff should live within your help desk, not Outlook. They should be helping customers and closing open support issues, not checking emails. This again comes down to applying laser focus. If you can minimize the many daily distractions this will lead to quicker issue resolution and happier customers.
9 Don’t wait for a rainy day

We all know the scenario. Your customer calls with a problem they previously reported and you’ve not made any progress or even worst your unfamiliar with the case.

This can quickly lead to a loss of moral within your support department but more importantly this will inevitably result in a poor customer service.

Don’t give your customers a chance to call or follow up with your support staff. Be pro-active with your customer support. We understand this is often easier to say than do. It’s not easy to find the time within a busy support department. If you’re a small business struggling with requests consider employing a first line support technician as described in the "Divide & Conquer" section. This will free up your time to focus on resolving open complaints or issues.

Delegate a weekly task to your first line support personal and have them review outstanding or open support issues. Your help desk should allow you to quickly identify open or unresolved enquires. Have your first line support staff send a quick message or call each customer to follow up on open enquiries. If you need more information to resolve the enquiry have your first line support compile this information and escalate the enquiry once ready for advanced or back line support.

This weekly task may take an hour or two but will show your customers you care and are being pro-active with your customers support. It will also help you stay on top of your open support issues and should ensure your support staff are not taking calls from angry customers leaving them free to focus on resolving issues.

We find typically if a customers has not responded for several days to open issues they may have already resolved the issue through other self service support methods and may ask you to close the issue. If not it’s a great opportunity to escalate the enquiry to advanced or back line support to have them quickly ensure the issue is resolved for the customer.
10 Define your Support & Escalation Processes

This is especially true for your first line support staff. It may take some time initially to prepare your process documents however it will be worth the effort far into the future. Well documented processes will allow you to provide consistent, high quality first line support to your customers whilst ensuring your first line support can scale as demand for your products or services grow.

When compiling your support process you may wish to consider the following points...

- Define a support mission statement detailing what you expect from each support technician or role
- Define your typical response times so everyone is clear on what is expected
- Define standard replies for common questions (remember see tip 5 above "Is that a canned reply?")
- Define how common enquiries you expect to receive should be routed & responded to
- Define the conditions in which enquiries should be escalated to advanced and back line support

If you use an online help desk such as InstantKB.NET you can enforce & automate many of these tasks. It's advantageous to use a help desk alongside your process as this can help you automate the due dates & assigning of tasks through service level agreements & workflows.

You should document all common enquiries you expect to receive and provide a procedure for each type of enquiry. Then have your first line support manage these requests by following your documented procedures. Also create canned replies to help your first line support quickly respond to common enquiries. Common enquiries can include...

- License Fulfillment Requests
- Order Status Requests
- Product or Service Interest Requests
- Password & Account Information Requests

- Documentation Requests
- Refund or Replacement Requests
- Delivery Status Requests
- Promotional / Discount Codes

If your first line support is not able to assist with the request you should have a procedure in place to escalate issues to those who can assist. This would typically involve your first line support acknowledging receipt of the enquiry with the customer and escalating the issue to advanced line support for investigation & resolution. Similar advanced line support should have a procedure for escalating enquires to your back line support, product engineers or escalation managers.

If a refund, replacement part or call is required your first line support should be able to handle this using your documented procedures. If you use a help desk with knowledgebase features it's often a good idea to publish & share your processes internally with your staff within your knowledgebase. This allows you to update these procedures as needed.
11 Take Control & Stay Organized

Whatever method you use to manage customer support an important aspect of feeling good is to stay on top of issues in your support queue. This means keeping issues organized, prioritized and assigned correctly so you can quickly identify the status of enquiries and if the enquiry requires action from you.

Your first line support should ensure all customer support requests have received a response and enquiries are well organized and ready to be picked up by advanced or back line support. Again have your first line support staff periodically organize & prioritize issues awaiting resolution.

This should include ensuring issues are assigned correctly and if necessary prompting the user who should be dealing with the enquiry. Have your first line support staff close issues that have since been resolved.

If you use a help desk solution features such as workflows & rules can help you automate many of the time consuming categorization, assigning & notification tasks.

12 Follow Through

If you really want to provide amazing customer service and have the available support staff this is a great opportunity to be pro-active and seek customer referrals or testimonials. Follow through when the customers support issue has been resolved. Again your ticketing system should allow you to identify issues you’ve resolved.

This can be a weekly task assigned to your advanced line support staff. With all the time they will save with first line support working from well documented procedures you can put this extra time to use by following up with customers and asking them about their support experience.

If your customers had a positive experience gently follow through and ask them for a short testimonial. If you follow the tips within the “Your customers don't have a crystal ball” step earlier in this paper your customers will recognize all your efforts and will hopefully feel obligated to agree to your testimonial request.

If you did not provide a positive experience your first line support should escalate the issue to your escalation managers. Your managers can then oversee an issue until it’s been resolved and work to ensure the customer is happy.
13 Just one more...

We can’t resist. Set-up auto-responders to acknowledge receipt of emails or tickets directed to your support department. Indicate within the auto-response the typical response time and acknowledge the enquiry has been received and will be dealt with promptly. Your auto-responder is also a good opportunity to point your customers towards any self-help resources you may have available (knowledgebase, documentation, faqs, community forums).

Next Step

At InstantASP, our purpose is to revolutionize the way your business manages customer support. We understand the importance of providing great support and we’re happy to get you on the right track. Our support experts are standing by to give you a FREE, no-strings-attached review of your current customer support strategy.

You can contact us anytime by email at sales@instantasp.co.uk or call +44 (0) 1565 832 827 Mon-Fri 9am-6pm GMT.

Can InstantKB Help You?

Our integrated knowledgebase & help desk solution -- InstantKB -- allows companies of all sizes to quickly enforce many of the tips presented in this paper. InstantKB comes packed with tons of great time saving features to help your support staff more effectively manage & close in-bound customer support enquires.

Prices for InstantKB start at $ USD per month for our fully managed, on-demand SaaS solutions. We can typically have this set-up for you within a couple of hours from receipt of your order. If you would prefer to host InstantKB.NET within your organization our self-hosted, on premise licenses start at $199 USD. If you would like to learn more about InstantKB.NET please use the links below or contact us.

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Enabling Great Customer Support

To learn more visit us at www.instantasp.co.uk
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You can’t underestimate the power of great customer support. If you keep your customers happy they’ll become advocates for your products or services. Do your best and turn each customer into a fan for life. Be Amazing!