5 STEPS TO GET STARTED

with customer service

INTRODUCTION

Welcome

to the “5 Steps to get started with Customer Support” guide. I am excited that you are here! It means that you are keen to either reset your existing customer support operations or to know how to get started.

Customer service for SaaS products today is more important than ever as it is so easy for the customers to switch a Service Provider with just one click. Customer support plays a critical role in shaping the overall customer experience – and keeping customers. I encourage businesses to establish their customer support function as early as possible to ensure customers are receiving the very best client service from the very first encounter with your business and brand.

Here in this guide, we will cover 5 steps on how to get started with setting up your support operations. By having clear steps to get from zero to fully functioning support helps you to understand what is important and to avoid common mistakes.

I hope this guide kick starts you into wanting to roll up your sleeves and getting started. I hope you feel inspired, motivated, and ready to start working on customer support function!

Jonna

STEP 1- HAVE A PLAN!

Planning is the first important step

towards creating a strong support function for your SaaS business. Before getting your hands dirty and really starting to set up your support department, you need to have an understanding of the support you want to provide, boundaries and ticket flow.

I recommend to start by developing an understanding of the desired outcome in order to build the support for the client's needs and resources. Think about what kind of support you want to provide and where your clients are based.

Support description / offering

- What kind of questions will you most likely receive: product related how-to questions or complex technical questions, or both?
- Should support also take care of contract, ordering and invoicing questions?
- In case of very technical support, are there any boundaries for how far possible issues are troubleshooted?
- Do you have any estimation of amount of contacts?
- Do you need to offer multi-language support?
- Do you need to provide support in different time zones?
- Do you need to provide 24/7 support?
- Will you have a dedicated person(s) to do customer support, or will it be a communal effort?

The questions above affect the choice of ticketing

system and how to configure it. In order to set up your selected ticketing platform, you need to know which departments are involved with solving the support tickets, how tickets will be escalated/transferred to them, and who will communicate with the client. This will determine which fields to use or create and which integrations to other systems should be established

Ticket flow—Transferring tickets to other teams:

.

- How to transfer a sales related question from support to sales?
- How to transfer customer success questions from support to success?
- If a sales person receives a question from the client that they can't answer, how is that passed to support in the most efficient and customer friendly way?
- Do you need to escalate tickets to 3rd parties (e.g. a supplier or a service provider) and how that is done?
- How to transfer tickets to other internal technical teams?
- Who should own the communication with clients (e.g. should developers talk directly with the client?)
- Will they be using a ticketing system as well?
- Will they only be notified in Slack or in other group chats?
- How do other teams follow up on those requests?
- How does the support person see the answer and get notified about it?
- Should there be an integration with other tools (like JIRA if developers are using it) to share escalated tickets?

If your service is fully in-house, and you do not need any 3rd parties to offer you a platform or service, and support is provided only with 1 language, that is great! That makes your support much easier to build. All you have to decide is how to handle tickets when other internal teams are needed.

Sometimes the support setup requires more planning, especially when 3rd parties are involved. Or when providing multi-language support and the client needs to receive support in their own language through the ticket handling process. For example, this setup might require that the ticket ownership remains in support where all the different languages are spoken, while the other tiers can have all English speaking agents.

Personally I believe that every client should have the opportunity to discuss with an experienced and knowledgeable support agent. The position where people just blindly collect information and follow pre-set processes can be replaced with a chat bot or other self-service options. Save your hardworking team's time by handling more complex tickets instead.

Also, particularly at the beginning, when the volume of incoming cases is low, you might want to start with an all-hands-in approach. This is a cost efficient solution, and makes everyone involved, while also feeling the "customer's pain" and appreciating the support department in a totally different way. However, this solution requires that everyone is motivated to do support, they know the product and processes inside out, they have the necessary soft skills to provide exceptional customer service and that information is well documented and communicated between all team members.

Whatever your situation and desired outcome is, it is important to start with some planning, to ensure you offer a great support experience with required internal processes in place. As you gain more experience with how the established support works and your business grows, existing setup should be evaluated and improved accordingly.

STEP 2- START DOCUMENTING

Keeping written documents of

questions, answers, and information is key when it comes to running a support department successfully. No one wants to run their support without writing down answers, troubleshooting tips, workarounds, processes, and tasks undertaken and performed by support.

It's also unfair on your support staff to not do this. Without this information, they all have to learn these things separately and keep all of the important information in their memory. It's also unfair for customers, as without this basic knowledge made available to them they have to contact customer support for every little problem.

Documenting

When we say documenting, we don't mean on the Slack channel where people ask questions from company's Product department or colleagues. We also aren't referring to people mentally documenting things. After all, that is useless unless there is some way to get the information from one brain to another. The human brain isn't made for storing things a group needs access to. Better to allow your staff to have that space and put it to better use, such as thinking creatively and coming up with new solutions to problems. This is why you need to write everything down.

I recommend that you start documenting as soon as possible. Write down all the questions that your clients have during a pilot run/soft launch. Also try to come up with some questions of your own that a client might not have. There are some basic questions and documents that you should go through as well, including:

- How To—a basic user guide that guides users through the entire product/platform
- Basic questions on billing, accounts, passwords, etc.
- Any known limitations of the service or features
- API

The documents that you write will usually be put in front of two different audiences; the internal customer support team and the external customers. When you put together a knowledge base and begin documenting knowledge, it helps to train new employees and reduces how many support requests come in to the team as customers can learn from previous experience.

Internal Documentation

Having internal documents is as important as having external ones. What if your only support agent gets sick and you have to take over? How can you find answers to complex technical questions when the only one who has those answers is not at work? You can't keep customers waiting until the agent is feeling better and back at work.

If you pre-launch your product or do testing with real customers, then this gives you a great chance to understand the kind of questions a customer will have. You should find some way to collect and store these questions. Do you have them in emails? Great! It's time to look through them and collect questions, organizing them into different categories such as Product, Billing, API and User Accounts. Ideally, you should be documenting the questions and answers in real time as it's much easier to remember answers at the time—especially if the support agent had to perform internal actions to deal with the situation—and it helps agents get in the habit of documenting support requests.

You should get a ticketing system set up as soon as possible, as most ticketing systems come with Knowledge Base functionality. However, you don't need a tool from the very beginning to handle documentation, especially if you still aren't sure which ticketing system would be best for you. Shared documents—Word or Google Docs—is a good choice at the start. It allows you to collect information and store it in a central place. You can always transfer the information to a real Knowledge Base afterwards. Starting documentation is more important than knowing where you'll be storing everything.

External Documentation

Make sure instructions are written as clear as possible. There's nothing worse than having to try and understand long sentences and chapters. Keep the information easy to read using screenshots / pictures, GIFs, and videos.

External documentation should preferably be attached to the product User Interface, so that the information is easily accessible to customers when they need it.

It may seem like providing answers to customers is slow at first, as you have to investigate the topics and you must learn from their questions. Take it as a chance to document things immediately. For example, let's say a customer asks about the advantages of connecting to your platform through an API. Write out a document about the topic and use it to answer the client's queries. In time there will be less and less undocumented topics, questions, and situations, but you'll always need to write new documents. As the software continues to change and evolve, so too must the documentation.

Don't wait too long to publish external documentation either. Putting together an FAQ is a great starting point. This FAQ should be kept to a maximum of between 10 and 15 common questions. If you are using an online Knowledge Base then the information will live and evolve. As long as a customer has access to the online instructions—as opposed to documents shared via email—and follows them, they will always have all of the latest information to hand. You want the content to be read and used and you also want to collect any experience people have with it to ensure it still works and, if it doesn't, what needs to be changed.

Also take the time to create a clear onboarding program for customers based on their experiences with a soft launch/pilot scheme. This helps customers in the future to better self-service and reduces how many questions and queries your customer support agents get about basic functions of the software.
The good news is that most ticketing systems have Knowledge Base functions built into them, which makes it easier than ever to adopt this vital feature.

STEP 3- DEFINE YOUR AVAILABILITY

There is a saying

"The best service is no service." When everything works smoothly in the background and customers have enough self-service opportunities, they do not feel the need to contact your support team. But when they do contact you, you need to make sure that your support shines and provides a pleasant and smooth experience for your customer. If your software is amazing, but your support lacks quality, you might lose your customers to the competitor with better customer support.

Choosing channels

Choosing a right channel could indeed turn out to be a make or break moment. Deciding which channel, or channels to start with depends on your capacity and the type of business you are in. As suggested in the previous step I assume you would have already gone through a set of questions to define your business and needs.

If your product is quite technical, and you are expecting to receive complex questions, chat might not be the best place to troubleshoot connection between two different applications, or to guide user with the errors they get when trying to use your software via API.

However, chat can be a fast and rewarding tool to solve simple issues regarding invoicing, payments or user accounts. But again, these issues might be so simple to solve, that either you might want to find a way to minimize the amount of such questions (via self-service) or by setting up a chat-bot.

Without a chat-bot, you need to make sure you always have the required number of resources available to cater to your customers' queries. If none of your agents are online, understandably, none of your customers will receive any customer support assistance. After-all, customers do expect to receive immediate response to their queries. In addition to that, to provide good support via chat, you need to have enough internal knowledge in place to provide proper answers to multiple impromptu questions.

Stepping up from chat, telephone is another time sensitive channel with regards to your customer support service. If there is nobody picking up the telephone or the agents are not well trained to talk to customers, this channel might just cause you more trouble and bad customer satisfaction ratings.

Talking to agents adds a personal touch and in B2B businesses, it helps in building good customer relationship. However, it might not be feasible to discuss extra technical issues over the phone, as some screenshots or configurations might be needed. Telephone is also not a very scalable solution. The more clients you have, the more support agents you need, so calls are not missed. Additionally, waiting in queue for longer periods of time could turn out to be really frustrating.

Support via social media channel is very sensitive. Every response will be out there, available for all your customers and non-customers to see and analyze. Your responses to customer complaints are seen and one small mistake could create havoc on social media. (This could also happen when using other channels).
Email is the most flexible channel what it comes to response times. This allows your team to investigate the issue, contact other departments, and try to reproduce the issue themselves etc. The customer is not there expecting an instant answer.

However, with email you can't keep the customer waiting forever; your answer must be sent out in a timely manner. With email, the issue is that the customer does not know what is happening; whether someone is working on their support request or not? Therefore, providing clear expectations to the clients is important: when they can expect to hear from you?

Getting started

My personal suggestion is to start by using email as a contact method. If you are operating in a B2B sector, you could be expecting the same people contacting you on a regular basis. I would suggest using your ticketing system's self-service tool, which allows your clients to see their support requests and status of those requests.

Especially in B2B, setting expectations is very important. By providing a simple, easy to read, support service description with expected response SLA might do it. When meeting the SLA and providing quick responses, such an over delivering impresses your customer.

When choosing a channel, think about the following questions:

- Am I working in B2B or B2C?
- Am I expecting to receive simple questions or technical questions?
- Do complex questions require involvement of other departments?
- How many dedicated support agents I can have?
- What kind of a support we want to provide / what is our goal (personal touch, scalable solution, self-service as much as possible, use support to boost the sales)
- What kind of SLAs I am aiming to; first response time, resolution time?

Do not be afraid of trying out different approaches. You might be able to launch a trial for chat channel, or just for selected customers. After launching your support, you need to follow proactively if the selected channels were correct and whether your assumptions about the type and volume of support request were right. And remember: one solution does not fit to all!

STEP 4- YOUR WHY

So, your business is running

and your customer support team is handling incoming inquiries. Suddenly, the amount of customer inquiries increases. How do you find out what caused this? Do you feel that most of the questions are relating to a particular topic? Even if this is the case, to efficiently run support you need facts to drive future directions.
In order to know why your customers are reaching your support, this must be tracked somehow. Tagging, labeling or categorizing tickets is not simply an additional field for your support team to fill in. They’re a key mechanism to help you get a better grasp on what is happening in your support.

Why are customers contacting you?

By creating knowledge base articles for customers about the most common and recurring questions, this can reduce the amount of incoming inquiries. You might also be able to identify UX issues in your product. Fixing those can also reduce the amount of incoming contacts.

Additionally, you can share the statistics with the development/engineering team to showcase how many issues a certain bug or a lack of feature causes, to help with prioritization of work. By showing them how often your support team needs to perform a specific manual task, it might be valuable to find a way to automate that task.

Be curious! You want to know why your customers are contacting you and you should not trust feeling-based estimations, but raw facts and numbers.
Remember, you want to eliminate incoming simple requests and save your support team’s time for complex inquiries.

How to categorize inquiries?

Some ticketing systems provide ticket type categorization out-of-the-box. They do offer a possibility to choose: service request, bug or incident. These categories are generally good.

Depending on your product or service, you might want to add a “how to” option. This way, you can easily filter out tickets where a client did not know how to do something. These tickets are low hanging fruits to either establish or extend your external facing knowledge base OR improve your software’s UI.

- Service request – do something that the customer can’t do themselves
- Bug – a feature does not work as expected. Usually happens after a release.
- Incident – a feature is broken / platform is down
- How to – a customer is asking for advice about how to do something
- Feature request – a customer is suggesting an improvement to your product

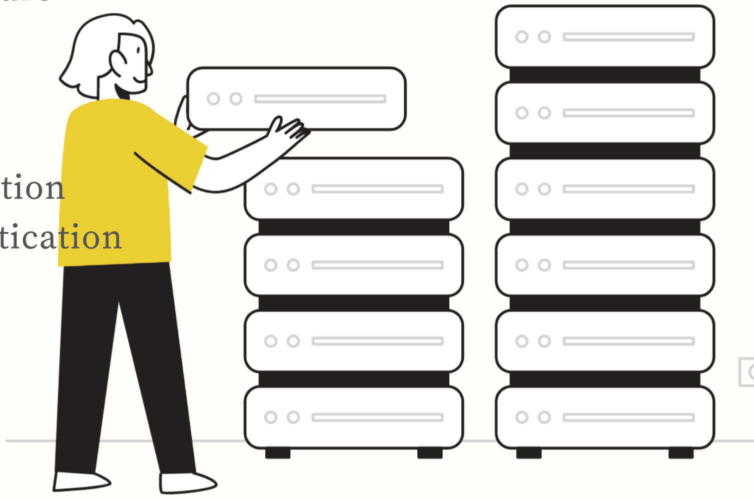
These main categories or ticket types do not yet tell much. You want to know more! The next step is to support categorization based on themes - the topics which incoming queries are about.

The easiest way to get started is to create list of your product’s features. If your tools support cascading lists, a list can be divided to smaller lists to help the support team to the most specific, relevant option.

For example, let’s say that your product has the following features: Invoicing module, Sales Module, Contract module. Your system is also connected to some third party providers via an API, e.g. to Facebook.

You want to create a main lists for these and then add additional details under each to drill down to the specific topics for the queries. E.g.

- Invoicing module
  - Change billing address
  - Extend due date
  - Cancel subscription
  - Other
- Sales module
  - Offer creation
  - Lead generation
  - Landing pages
  - Other
- Contract module
  - Templates
  - eSignature
  - Other
- Facebook
  - Connection
  - Authentication
  - Posting
  - Pages



By using this method, you can collect considerably more information about what is really happening in your support.

Example 1
A ticket is categorized as a **Bug - Contract module - Templates**. If you see a lot of requests coming in relating to this, it is time to have a serious talk with Product / Developers about the matter. Or, if there is a known bug in this template functionality, categorization helps you to see how many customers are really affected and suffering because of this bug.

Example 2
A ticket is categorized as **Service request (or How-to) - Invoicing - Change invoice address -**
If you receive a lot of inquiries about this, it can mean that:

- users are not finding a way to do this on their own (either there's an issue in the client facing knowledge base or in the UI)
- it is not possible for customers to do that themselves
- if there's an increasing amount of requests for such a simple task, you could talk with the Product in order to add the functionality to the UI.

Another option, depending on your ticketing system, is to opt for automatic categorization based on the keywords in the incoming query. The field should be mandatory to fill in and tickets categorized as "other" should be analyzed within your weekly reporting to see if there is a reason to create more sub-categories or even new categories.

Also, make sure that the field (tag, label) is available to use in reporting. Ensure that it is not possible for your team to create their own labels and tags on a totally adhoc basis; otherwise reporting will become difficult as the same topic might have several different tags or labels.

Starting to categorize tickets from the start is much easier than adding them later. It is also a beneficial practice that will give you valuable insights into your support and your customers' needs.

STEP 5- IDENTITY

In general,

values support the vision of a company while also reflecting the company culture. Values help drive the company's decision-making process and influence the company's branding.

Values in customer support

If you set up values for your customer support, it has the same purpose and effect. The identity of your customer support is similar to your company's brand. How do you want your customers to experience and describe the support they receive? Your identity is a compass, which you use to check if your support operation is performing as planned.

Deliberately setting your support team's values can go a long way towards building a workplace mindset that brings everyone together with a shared purpose. It is important that the whole team is working in similar ways and towards the same goals. For example, a simple goal to start with is to have an agreement of how fast first responses should be provided. Shared goals can help maintain a consistent support experience, no matter who in your company answers a customer's inquiry.

> "When your values are clear, your decisions are easy "
>
> *- Roy E. Disney*

Defining values for your support can also benefit your decision-making. For example, if you encounter a rude customer, checking your internal values might help you react to the situation in the way that reflects your support identity. Or if a customer asks for something that requires a lot of manual work from you, what do your values say about running extra miles?

These definitions or values can be an effective base for internal quality checks. When performing these checks, every email conversation, chat or phone call can be mirrored against these agreed values to define if the established identity was aligned to or not. Monitoring quality internally is important as your customers do not know what kind of support you want to provide for them. So just following your Customer Satisfaction ratings (CSAT) is not enough, as your customers can only rate the support they experienced.

You can start the process of building your identity by setting expectations for your clients. This is done with the help of service description.

Support service description

One simple and easy way to share your identity with your customers is to write a service description for your support.

By providing concise documentation either as a part of your contract (one or two paragraphs) or as a separate document, you help your customers understand what they can expect from you. For example, how they can reach you, when, how fast they can expect to receive a reply, etc. Needless to say, exceeding these expectations is allowed!

To quickly get started in creating your support service description, feel free to use the template (click!) I have made.

Define your values

When defining your values, get into the details, be concrete and specific! If you say that you run extra miles for your clients, what does that mean in practice? Does it mean that you reply to their requests in the middle of the night, despite your support officially being open only during office hours? Or does it mean that you turn every single stone to find a solution or at least a workaround for your customer's problem?

What does it mean by you providing friendly support? How do you demonstrate friendliness?

Everyone has a different understanding of these, therefore very concrete and specific examples will help everyone to understand how these values are demonstrated in their daily work habits and behaviors.

How to get started with defining your support identity?

One way is to think about this is how do you see and experience perfect support? If you have had great customer support experiences yourself, try to narrow down what were the components that made that experience memorable and great. Or if you had a bad experience, think about that and take the opposite of that experience as a part of your identity. Think about your business and your customers - what do they expect and what would they appreciate? Is it the speed of responses? A relaxed communication style? Extra tips and tricks? Is it the caring attitude, where you follow up that provided answers were helpful?

Keep in mind that customer support teams can only offer service as good as the rest of the company will allow. So it’s a good idea to connect your customer service values to the company-wide values, as this can help reinforce consistency on the company level.

To get more inspiration for building your support team’s identity, you can also check out your competitors and make yourself stand out by offering more or better support than them. If there are two equally good products, but one is packed with better support, it’ll likely attract more customers.

You can also make your internal values public, and be very transparent about what kind of customer support you are aiming to provide. Building hype around the excellent support you provide from the beginning of the journey of a new business can help to build reassurance and trust, as your customers know they will be assisted along the way.

Here are a few examples of companies who made their identities public (click links to get inspiration) :

- Verizon
- Ritz Carlton
- Open Road Alliance

Overall, use your support identity to your advantage, in order to boost trust and attract potential customers, while also reinforcing your company’s overall brand identity.

Fluent in support

Email: jonna@fluentinsupport.com

Web: www.fluentinsupport.com

Linkedin: https://www.linkedin.com/in/jonnatolvanen/