CloudApp

Customer Support Best Practices

How leading teams **scale exceptional experience**

A handful of world-class teams set the bar for kickass customer support. In doing so, they've become some of the most beloved software brands on the planet.

And you can join them.

What strategies are these teams using to delight customers at scale? Their processes are built to evolve as business grows. They prioritize building trust with customers.

And they look beyond the queue to turn support into a key part of the overall customer experience.

Their success—while impressive—isn't impossible. These companies are industry favorites who have open-sourced their learnings, so teams everywhere can do better by their customers. This playbook shows how these teams deliver superior support and how you can borrow their best practices today.

Evolve your processes like Slack

"Do not get too attached to any one thing that is happening because the growth of our company will necessitate a difference."

— Ali Rayl, head of global customer experience at Slack[1]

If there's one constant in technology it's change. Month to month, year to year the features, integrations and announcements bring about enormous transformation at software companies. And nowhere is this more keenly felt than on support teams.

Being able to ride the wave of change is vital to support operations at messaging app Slack where processes are built to last a few quarters—by design.

Secret #1

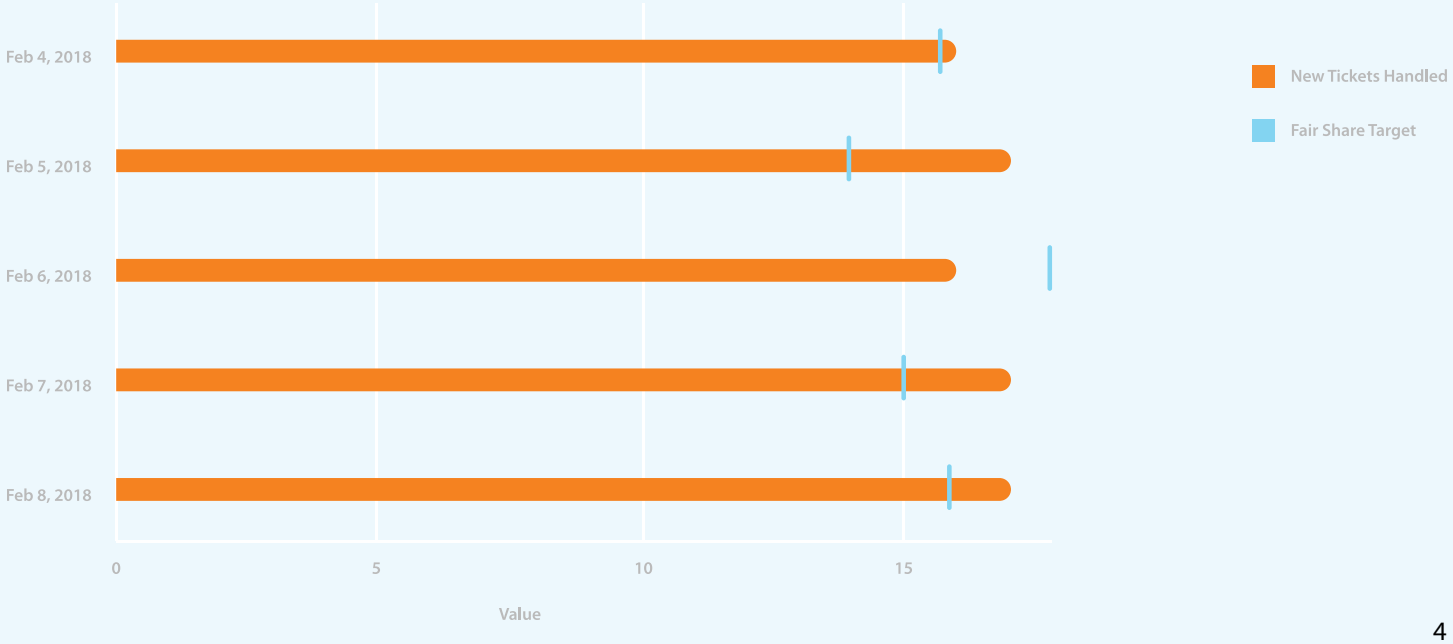
Spend less time building processes with the intention they'll change in six to nine months.

Trial and error into "fair share" management

Slack started out with no true process to manage volume. At first, every ticket lived in one queue, but the team struggled to know what was most important and how quickly they should work. So, they subdivided the queue and assigned team members by topic like mobile, integrations and sales.

But work wasn't spread out evenly and efficiency lagged. Some people worked fast and knocked out large amounts of tickets. Others worked on low-volume queues and weren't busy. Slack iterated again and adopted a "fair share" way of working. Now, team members see targets based on the day's number of tickets divided by the number of people working (Fig. 1).

Figure 1



Secret #2

Ditch the quotas. Arbitrary benchmarks don't work for support at growing companies.

Why quotas don't work on agile support teams

The targets help, but Slack support still operates without quotas. Why?

It's in freedom from quotas that the team is able to deliver support for whatever the business needs that day. With high volume events like feature launches or outages, quotas leave team members believing they've achieved their goals, while customers go without service.

Rayl shared, "The success criteria for [high volume] days is higher than on a normal day. So, quotas just don't work for the way we run our team and the way we approach the volume of work to be done."[2]

As your company scales, things in support will break. That includes quotas. With change management practices—instead of numbers—at the heart of the way you work, your team will more easily match the pace of growth.

Embrace transparency like a Buffer

> **"The more open and honest we've been with customers, the richer the relationship has been."**
>
> — Carloyn Kopprasch, chief customer officer at Buffer[3]

Transparency is a strategic move in today's customer centric world. Nearly all consumers (94%) are more brand loyal when organizations offer transparency.[4] And total transparency is a key value of Buffer's business.

From pricing to product roadmaps, transparency is the default setting for the social media management app. That goes for customer care, too.

Secret #3

Commit to transparency when a high-volume support event hits.

Staying open with customers when it counts

Take a support professional's worst nightmare: a hack. Nine minutes after the team confirmed a security breach in 2013, a brand tweet was published and a customer-facing email was sent. The company posted and continued to update a live blog as email and Twitter support contact tripled.[5]

While hacks can seriously hurt business, Buffer found that extreme transparency (combined with speed) didn't impact their pipeline. The days following the hack showed nearly record sign-ups. In spite of a massive security incident, rapid, straightforward communications helped maintain customer's trust and bring new ones on board.

Secret #4

Set up a sync with product representatives and share meeting notes across the entire support organization.

What internal transparency looks like

Support offers the entire business a direct line to the customer; collaboration with internal teams like product, sales and marketing is critical to closing the feedback loop.

Buffer committed to bridging the gap between support through a consistent communication system. Members from both teams meet weekly, and the meeting notes are shared with everyone.[6]

At first, these meeting reports were brief status updates, but they've since grown to provide resources like screenshots, FAQs and links to documentation. This channel allows for a transparent view of the product roadmap and involves support during early stages of product development. When one communication channel turns into a two-way street for feedback between teams, customers benefit.

Checklist for support and product alignment

- [ ] **Weekly syncs on product updates**
- [ ] **Meeting reports that include:**
  - **- Product screenshots**
  - **- Documentation links**
  - **- Important dates and rollout calendars**
  - **- FAQs**
- [ ] **Allow everyone to access reports**
- [ ] **Gather feedback on impact of report information**
- [ ] **Iterate on report style and frequency**

Expand your team's role like FullStory

"You're going to burn out pretty fast if you're responding to emails from the moment you clock in to the moment you clock out, five days per week."

— Ben McCormack, support at FullStory[7]

Today companies must consistently surface innovative ideas to survive. Where better to get them than from your front lines?

It may fly in the face of a support agent's job description to ignore the queue for set hours every day, but allowing time to solve problems outside of tickets is core to support's role at the customer experience and tracking tool FullStory.

Secret #5

Block off calendar time to be out of the queue and working on bigger projects.

How to make time outside the queue happen

First, let's clarify that non-queue time doesn't include answering emails or attending meetings. It should be meaningful work that actually solves business problems or makes improvements to the product. At FullStory, these projects include reviewing the quality of documentation and analyzing feedback trends.

To make sure this time actually happens, plan out schedules that account for meetings, time off, releases, etc., and then add calendar events for non-queue time. FullStory found scheduling hours to be critical to breaking away from the queue.

You may understandably feel fear in pulling team members off tickets. The key is providing clear goals that your team can achieve using time outside the queue. FullStory uses Google's objectives and key results (OKR) framework, and team members use non-queue time to make progress on their goals. To keep outcomes top of mind, create a forum (like a stand up or group chat) where updates and encouragement are shared on a regular basis.

Secret #6

Pick 10 things that need fixing and systematically tackle them during scheduled time outside of the queue.

Tackling your team's top 10 list

When your team is spending time in the queue, they probably see recurring problems and feedback. Sometimes these small issues get ignored, but quick fixes could improve the customer experience. So, FullStory enacted a program for jumping out of the queue and delivering solutions: the top 10 list.[8]

While your team members work on the queue, they should collect repetitive issues and feedback into a running list. Review the list of improvements and shop it around to other departments for the context you need. Next, rank these problems in order of importance. When your team isn't in the queue, they should be researching and championing fixes for the top 10 most important issues. At FullStory, solving the top 10 list has allowed support to drive new features, product redesigns and critical updates for General Data Protection Regulation (GDPR) compliance.

Understand the Customer's Problem-Solving Process like Intercom

"Set proper expectations; make sure people aren't expecting one thing and then getting something completely different.

Managing that the second they get to the site or write into you is really important for support teams. The root of a good customer experience is giving people options; giving people the ability to do things the way they want to do it"

— Ryan Steinberg, Head of Support Operations at Intercom

Customer support is all about connecting with customers and improving the customer experience. By doing so, a company can improve retention and build relationships. Customer support team needs to recognize that the ideal customer experience might look different for every individual. It is crucial that support teams be flexible and deliver solutions in forms that suit the preferences of a customer. Some may choose to browse an FAQ section, while others might decide to write-in to the live chat tool.

Secret #7

Give your customers the power to approach the problem the way they want.

As the saying goes, customer is king.

Support teams should uphold this as they approach problem-solving with the customer. At Intercom, this saying is taken to a whole new level: the support team sees the value of letting the customer decide how to tackle their problem.

This means the support team gives customers "**the ability to self-serve, or the ability to talk to a human and dive deeper"**, because **"respecting individuals, their time, and the way they want to approach a problem"** is part of supporting a customer.

Secret #8

Get a holistic picture of where the customer has been and where they currently are in the problem-solving process

At Intercom, the support team recognizes that the journey to solving a customer's problem isn't always a simple, obstacle-free path.

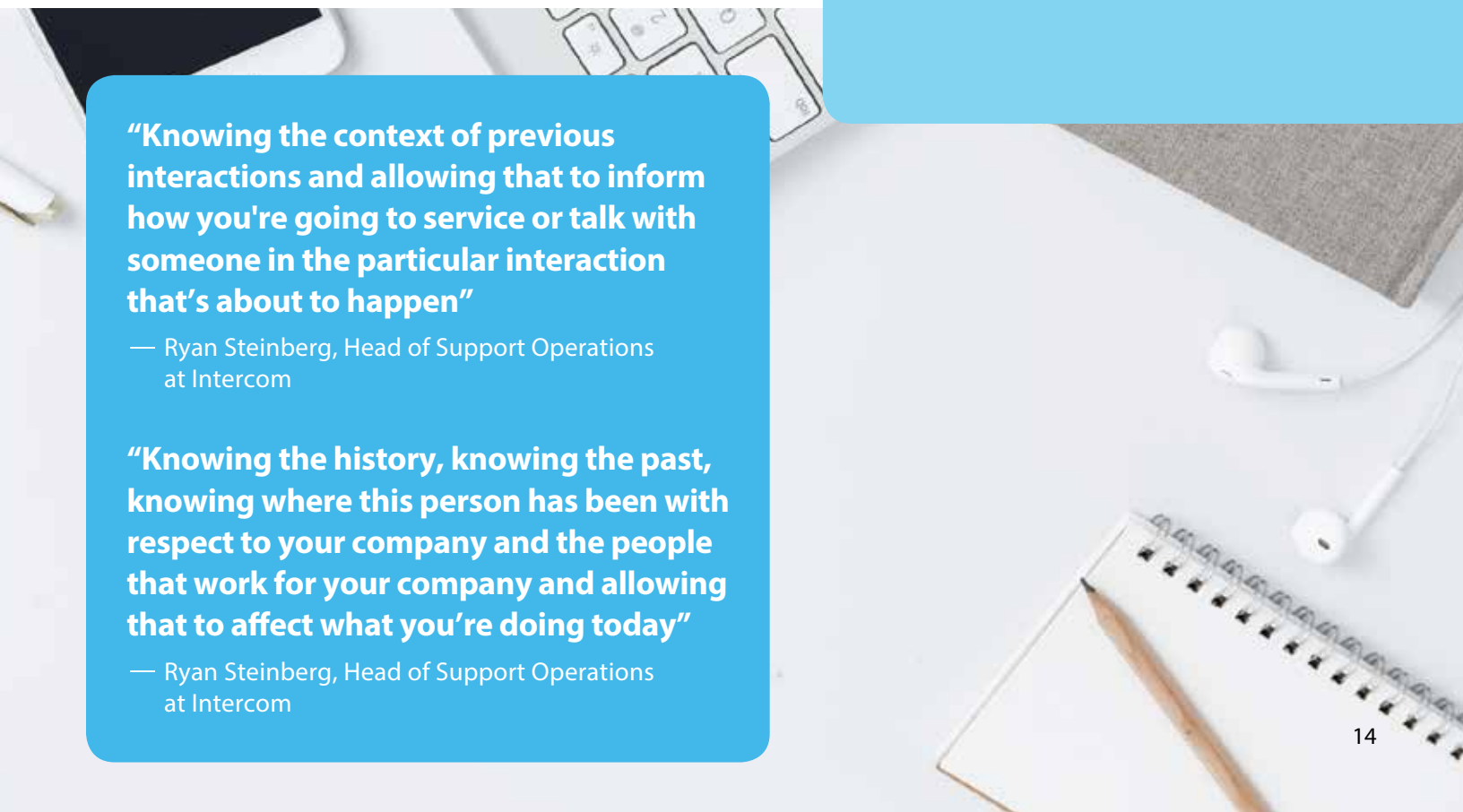
It's important to take the time to examine where the customer has been and gather information about what occurred prior to your interaction with them. By getting some perspective, support teams can gain a better idea of how to handle the issue. Head of Support Operations at Intercom, Ryan Steinberg, understands that and sees creating an experience that emulates in-person interaction as the future of customer support. In terms of customer experience, this can be achieved by **"getting a holistic picture of where they're at, where they've been, and the experience they've had in the past".**

"Knowing the context of previous interactions and allowing that to inform how you're going to service or talk with someone in the particular interaction that's about to happen"

— Ryan Steinberg, Head of Support Operations at Intercom

"Knowing the history, knowing the past, knowing where this person has been with respect to your company and the people that work for your company and allowing that to affect what you're doing today"

— Ryan Steinberg, Head of Support Operations at Intercom



Invest in your support team and teach them tools to improve the customer experience like HubSpot

"We see support as central to our customer experience. And, it's been a big point of investment, not just financially but also in terms of resources, innovation and making sure that we're growing the team in terms of the skills that they're developing"

— David Hunt, VP of Customer Support at HubSpot

It's easy to overlook customer support when deciding where to invest in your company. But support is important; it's the bridge between the company and the customer, and your team needs to be equipped with everything it requires to properly assist customers and solve their problems.

"Support interactions impact retention; customers may buy Hubspot for a number of reasons, but the reason they stay with Hubspot is because of the support."

— David Hunt, VP of Customer Support at HubSpot

Making a commitment to provide customers with more than just the answer to their question can be crucial in their decision to stick with your company. Customer interactions should be viewed as a learning experience for support. Through them, support teams can discover what needs improvement and learn how to better assist customers in the future.

"What are we learning from these insights, and these friction points and the experience and what are we doing to eliminate them upstream? That's a lot of where we spend our time operationally: trying to refine the things that will help all customers and drive more value."

— David Hunt, VP of Customer Support at HubSpot

Secret #9

Focus on adding value to the customer experience rather than simply closing tickets

Customers usually come to support when they're in need of help or need to resolve an issue.

Although it is expected that support will solve customer problems, going above and beyond to add value to this process is the difference between meeting expectations and exceeding them.

Recognizing tickets as opportunities to provide value rather than as tasks to be completed is what makes the support team at HubSpot stand out.

"Drive more impact. Ask: 'How can we provide incremental value?', not 'How do we stop the tickets?'"

— David Hunt, VP of Customer Support at HubSpot

One way to add value to the customer experience is the devotion to customer success. It's about doing more than the just bare minimum to close the ticket; it's giving customers the tools they need to be successful in the future. Be it by helping the customer reimagine your product or simply shedding light on useful features, support should be **"providing value so that somebody is walking away with more than they initially came into that interaction expecting".**

Secret #10

Have Empathy for Your Customers

"Part of it is that human connection. Recognizing that you're helping somebody and that you're able to actually hopefully contribute something to their day, to their livelihood, and that's what so important"
— David Hunt, VP of Customer Support at HubSpot

As a customer-facing department, support frequently interacts with people, be it through a live chat tool, over the phone, or in an email. But with the lack of face-to-face interaction, it can be hard to remember the human part of customer support. That's why it's so important to exercise empathy and seek connection with customers. Taking the time to put yourself in a customer's shoes may help you to better serve them. Ask yourself how you would want to be treated in that situation, or what would be helpful to you at that time. This is especially crucial when dealing with an upset customer. If you dig deeper into why they're so riled up, you'll probably discover you might feel the same way in that situation, and can assess what the next best step would be.

During training, highlight the value of empathy during customer support interactions. Demonstrate to your support team how your company culture promotes empathy, or how it can affect NPS.

The right environment creates innovative support

While these cutting-edge support teams commit to changing processes for the better, demonstrating transparency and spending strategic time out of the queue, no one company claims to have achieved customer experience nirvana. Meeting the customer how, where and when they want is a tall order for support teams today; communication channels and expectations of speed continue to increase.

To help your team provide customers the best experience possible, give them an environment where they can do their best work. Leaders must ask themselves: is my team able to move fast enough? Do they feel safe being transparent with customers and the internal team? Are they equipped to provide solutions how they see fit?

If the answers to these questions isn't a resounding yes, consider strategies from these customer-focused software companies. And allow yourself to explore what's missing in your team's arsenal to provide the best support possible. Changing up your processes, policies and tools can be the key to unlocking your potential. With the right environment, your team will be able to match pace with your customer and join the ranks of top-notch support organizations.

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