

Vanilla

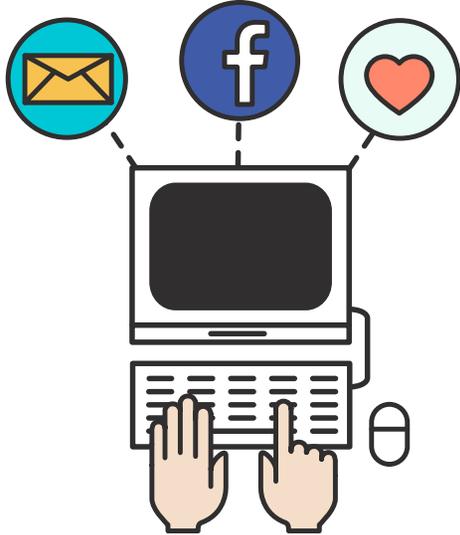
TRANSFORMING THE DIGITAL
CUSTOMER SUPPORT EXPERIENCE FOR
TECHNOLOGY ORGANIZATIONS



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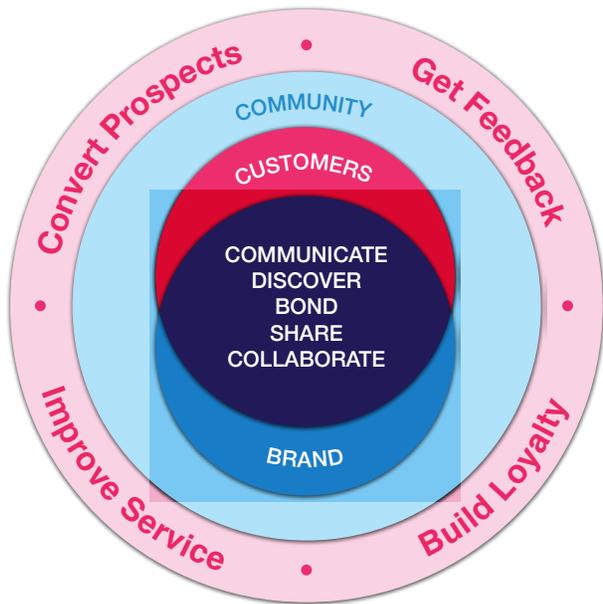


Introduction

Technology companies have an increasing amount of pressure for supplying good customer service, despite so few prioritizing effective support networks. In fact, only 45% of technology companies have a direct peer-to-peer support option, despite the fact that self-support options are considered a vital table stake in customer success initiatives.

On one hand, these companies are dedicated solving advanced problems for customers with specific needs. On the other hand, these companies continue to face fundamental challenges around scaling support options and providing accessible solutions to FAQs. Unfortunately, this roadblock has far-reaching consequences. Few realize that a visible, searchable, self-service option is a key element of reducing sales friction during a buyer's journey. Customer communities aren't just the backbone of post-purchase and advocacy cycles, they're crucial to the entire lifecycle of the customer, from prospect to advocate.

This ebook aims to explain how technology organizations of all sizes can benefit from creating self-service solutions, because it not only improves their reputation from a support standpoint but it allows them to escalate the support channel to an internal Voice of the Customer and Digital Transformation initiative. A responsive and self-serve customer service portal isn't just a nice thing to have: it's become a vital element to the survival of your organization.



Stepping stones to customer success

Providing solutions doesn't get any less important once you transform a buyer into a customer. In order to maintain complete customer satisfaction and meet your support requirements, you need to develop a strategy that addresses customer needs at every level:

1. **Customer onboarding** - From the moment you sign the contract, the customer starts an onboarding journey with your organization. Depending on the business model, this process can be quick, or take a significant amount of time.
 - a. **Freemium and Cheap SaaS**
 - i. Automated onboarding
 - ii. Scaling self-service support is mission critical to maintaining a healthy profit margin for the mass of the customer base
 - b. **Mid-level Pricing**
 - i. Some professional services
 - ii. Often a kick-off call and introduction to available tools
 - c. **Enterprise Deployment**
 - i. Change management
 - ii. Employee onboarding
 - iii. Roll out the new platform while legacy platform gets phased out
2. **Self-service Support** - At some point, even the best onboarded customer (a stakeholder) will have a question. As intuitive as your platform is, there are bound to be problems that don't have intuitive solutions. Perhaps the UX isn't as easy to understand for edge cases, or certain users simply don't follow onboarding prompts.
3. **Bug Reporting** - Even the best QA processes let a few bugs pass through release cycles. Your customers will likely use your product in unforeseen ways, uncovering new bugs and issues. Should those be treated as support cases, or bug reports?



4. **Suggesting New Features** - Product management has an ever-increasing significance in tech organizations; product managers are mini-CEOs of their product lines. In a perfect world, they represent the customer, listen closely to the support team's reports, and work with creative and development teams to find innovative ways to solve the customer's challenges. But even the best PMs with the best processes to obtain and address new issues know they can't address every challenge as soon as it's brought to their attention. Giving your power users a voice in ongoing product innovation and ideation is critical. But how does one gather and prioritize this backlog? How does one communicate with customers when they won't follow your suggestions?
5. **Achieving Voice of Customer Goals** - Maturing tech organizations often have customer-centric mission statements. They want to "put the customer first", "represent the voice of the customer", "delight their customers", and the list goes on. Often, this translates into monitoring customer satisfaction ratings and measuring Net Promoter Scores.
6. **From Prospect to Advocate** - Today's tech buyers and consumers are incredibly savvy. It's a well-known fact that once a buyer engages with an organization to purchase a product, they've gone through at least 80% of the journey on their own. They are critical of organization-made statements and case studies. They understand anchoring and how they need to be wary of what they see. Therefore, they turn to their peers, analysts, and real customer comments before engaging with the organization.

Serving customers online - important considerations

Online customer service portals are the answer to delivering the best customer experience. However, they come with their own set of considerations.

- How do I manage high volumes of support content that can sometimes be outdated or inaccurate?
- How do I preserve service level consistency when introducing self-serve / community?
- How can I personalize the customer experience when doing self-serve / community?
- How do I measure the ROI of self-serve / community?

Online customer support solutions - pros and cons

All solutions offer a less than perfect experience. However, it doesn't mean that they can't be combined to meet the needs and expectations of your customers. We propose an integrated approach.

SOLUTION	PROS	CONS
Customer Community	<ul style="list-style-type: none"> • Real time curated content by actual users in their own words. • If publically available and crawled by search engines, guides directly to the right answer, using the same or similar verbiage. • If there's an unaccounted use case or issue, the community will quickly surface it. • Offers a direct connection with highly engaged customers (useful for product management and marketing) 	<ul style="list-style-type: none"> • Some support issues will require escalation (we recommend ticketing) • If left unmoderated and unmanaged, can become unwieldy. • Out of date content can surface. • Harder to build a community, as users will come and go after they solve problems. You'll need to provide useful reasons for people to stick around.
FAQ <i>(Frequently Asked Questions)</i>	<ul style="list-style-type: none"> • Great for SEO when structured properly and optimized. • Should cover what are truly frequently asked questions. • If done right, scannable, concise, customer-centric 	<ul style="list-style-type: none"> • Static • Usually written by people who don't interface with customers. • May use technical jargon and highfalutin language. • Worst: just a copy-paste from the longer user manual.
Help Documentation <i>(Wikis)</i>	<ul style="list-style-type: none"> • Great for SEO when structured properly and optimized. 	<ul style="list-style-type: none"> • A product manager might write up the articles explaining what to do if 'icons on the display pad become unresponsive' where a customer might search Google for 'buttons on the screen are not working'. Therefore the difference in how the question is asked can affect the ability to find the answer through your wiki.
How-To Videos	<ul style="list-style-type: none"> • Easy to understand visual explanations for complicated concepts. • Quick to consume. • Easy to share. 	<ul style="list-style-type: none"> • Pain to consume on mobile devices (high data usage if on cell network). • Gets out of date quickly. • Can be expensive to produce. • Might negatively impact your brand if it's hastily produced

Knowledge Base	<ul style="list-style-type: none"> • Offers a controlled experience for customers to find answers to their questions. • If offered, can offer a view of recurring searches. 	<ul style="list-style-type: none"> • Needs to be frequently updated • May miss unconsidered use cases • Might be a searchable version of the help documentation. See cons for help documentation. • A product manager might write up a KB articles explaining what to do if 'icons on the display pad become unresponsive' where a customer might search Google for 'buttons on the screen are not working'.
Ticketing Service	<ul style="list-style-type: none"> • Offers a direct, trackable way to escalate and follow issues to completion. 	<ul style="list-style-type: none"> • Not public. • Repetitive questions harder to avoid. • No SEO benefits. • Relies 100% on your company to provide support.
User Manual	<ul style="list-style-type: none"> • Complete resource that should answer all the possible questions and considered use cases. 	<ul style="list-style-type: none"> • Can't be easily searched • Not mobile friendly • Static. • Blind spot on unanticipated questions or issues. • Relies on using same words to describe problem than the product manager.
Social Media	<ul style="list-style-type: none"> • Finds the customer where they are. • Publically demonstrates responsiveness of a brand. 	<ul style="list-style-type: none"> • Can quickly degenerate into a negative vortex. • Can be missed if resources are not dedicated to social listening. • Doesn't scale.
Online Chat	<ul style="list-style-type: none"> • Immediate response to customers when available. • Pushes inquiries directly to CRM/Ticketing system. 	<ul style="list-style-type: none"> • Not searchable. • Not scalable. • No SEO Benefit • Relies 100% on your staff, and their ability to answer real-time with correct information

How do various support channels perform against customer preferences?

An omnichannel support strategy aims to provide excellent support to customers via the channel of their choosing. Are all channels created equal? Let's look at how support channels match up against customer preferences.

Attribute	Email	Phone	Knowledge Base	Online Chat	Social Mdia	Customer Community
Self-Serve	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Mobile	<input checked="" type="radio"/>					
Personalized	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Immediate	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



What customers say



PHONE

The phone is great when I need a problem solved right away or when I need to disclose confidential info. I try not to use the phone because I'll probably be put on hold forever.



What brands say

Phone support is expensive and it's hard to scale when call volume is high.



EMAIL



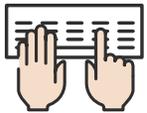
What customers say

I can send a long description of my problem by email but I have no idea when I'll get a response back.



What brands say

The asynchronous nature of email lets us better manage the load. There's a lot of product knowledge tied up in emails that goes to waste.



KNOWLEDGE
BASE



What customers say

It's a great feeling when a Google search leads directly to a KB article that is a perfect match to the problem. KBs can be frustrating when they are out of date or don't cover your issue.



What brands say

Our product managers do their best keeping the KB up to date but it's always low on their list of things to do.



What customers say

Chat is like phone support except that you can do something on your computer while waiting for a response. A lot of chat software is hinky and most don't work on my smartphone.



What brands say

Chat is more cost effective than phone because an agent can handle multiple chats all at once. Prank chats and customers that disappear mid-chat are annoyances. Also need to make sure agents are properly trained to give the right answers in real-time.



ONLINE
CHAT



SOCIAL MEDIA



What customers say

Social media is convenient because I'm already logged in. I also think that the brand will have to respond quickly because the whole world is watching.



What brands say

Social lets us create more customer intimacy than phone or email. We have a hard time capturing all the support requests on social, often because customers don't know how to properly mention us. All the content that we push to social is ephemeral and doesn't show up in Google.



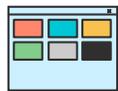
What customers say

I like being able to post a long form question and get answers from both support staff and other real customers. I also like browsing the existing discussion and often find a solution.



What brands say

The community helps deflect tickets from agents. We have a few really keen customers who answer a lot of questions on our behalf. A community is like a crowd-sourced knowledge base. We don't get vitriolic complaints like we do on social.



CUSTOMER COMMUNITY



Achieving balance

No need to reinvent the wheel. Often integrating what you already have all in one place (think hub and spokes) will help you further extend your support options.

Centralize on your brand's web experience in a single Support Center.

Support center

- Search
- FAQ
- Getting Started Guide
- How-to-videos
- User Manuals
- Help Documentations
- Online Community
- Ideation (Suggestions)
- Ticketing Service

Self-service support in action

THE CASE STUDIES



CASE STUDY

Cireson Deflects Their Customer Support Tickets by 90% using Vanilla Forum's Platform

The Company

Cireson was founded on a simple idea: to be the forward thinkers on all things Microsoft Cloud and System Center. As a world leader in Microsoft Cloud and System Center, their mission is to make customers' life more productive by bringing service and asset management together.

Despite already having a knowledge base, the support team at Cireson was being bombarded by technical frequently asked questions (FAQs). Joe spent a good portion of his day copying and pasting canned responses from a word document into his email client: the repetitive process of replying to inbound FAQs was extraordinarily time consuming.

The team at Cireson decided to find an alternative solution in order to make their support ticket deflection process more efficient, and more effective.



During their search, their criteria included:

The solution must be scalable: Vanilla Forums offered a scalable solution to address the ticket deflection issue that Cireson was experiencing.

The product needed to feature the following (all of which Vanilla Forums features):

- APIs
- Question & Answering
- Powerful search functionality
- An attractive and competitive annual cost

The Results

- Support ticket reduction of over 90%
- Realization of “listen to customers” core value
- Exponential growth in crowdsourced community support and effective community handling of ticket deflection
- Unexpected positive side effects, like new customer engagement with the product development team

Vanilla Forms has empowered Cireson’s customers by providing them with a new platform where they can engage by sharing and voting on product ideas. This has allowed the team to focus their time and energy on developing the features that matter most to their customers.

From a customer service standpoint, the support team at Vanilla Forums has gone above and beyond to answer all of Cireson’s questions.



Expectations Moving Forward:

- It is expected that Cireson will continue to leverage Vanilla Forums in their ticket deflection and ideation processes.
- Executive buy-in is evident and there is a top down push to help drive additional community engagement. New comments, points and badges are all measured, discussed and shared during weekly meetings. Senior leadership has gamified the forum internally and proactively rewards team members for their contributions.

Quote:

“Vanilla Forums has proven to be a worthwhile investment for Cireson. When I first started my day, I used to have 40 or even 50 support tickets sitting in my inbox. Replying to each ticket individually was incredibly time consuming. After implementing Vanilla Forums that number has reduced dramatically. Today, I generally have 3 or 4 tickets to reply to each day. This has resulted in massive time savings for me personally as well as the entire organization.”

– Joe Burrows, Senior Support Engineer, Cireson



Hootsuite migrates multiple customer forums & programs to one community platform

CASE STUDY

The Company

Hootsuite is the world's most widely used social media management platform with over 15 million users, including more than 800 of the Fortune 1000 companies. Hootsuite offers an integrated platform for social marketing, social selling, social customer service, and employee advocacy—helping organizations champion the power of human connection at scale.

While Hootsuite manages engagement programs that adapt with the evolving social and customer support networks, these channels don't always share the same goals and features. To solve their issues, Hootsuite combined their three different communities onto one platform, each with its own business challenges:



1. **Customer Support** - One of the challenges that Hootsuite's customer support team had was in engaging customers and identifying and solving complex issues which needed agent help versus the simple problems that could have been deflected or solved by the community.
2. **Advocacy Marketing** - Hootsuite's Ambassador program had similar support requirements, which relied on gamification to drive engagement. They needed to move off a legacy platform with stringent requirements.
3. **Customer Feedback and Ideation** - The third community, Hootsuite's ideation and product feedback forum, had fallen into disarray with poor engagement.

The Results

The results from Hootsuite's upgrade from their legacy platform to Vanilla Forums was almost immediate, with Hootsuite seeing savings, including:

1. **Positive results in the Ambassador forum include:**
 - a. An impressive 80% engagement rate
 - b. Single sign-on, allowing seamless access between Hootsuite accounts and the forum
 - c. Improved user experience
 - d. Better discussion and community between Ambassadors around the globe
 - e. One unexpected benefit is that 90% of new visits to our support community comes from Google organic search, with roughly 10-15% of all questions asked are answered by other Hootsuite users and ambassadors.



2. **The ideation and product feedback forum saw additional benefits, including:**
 - a. Easier suggestion submission methods and community voting
 - b. Stronger communication between the product management team and the customers
 - c. Direct linking through Hootsuite, ensuring their analytics and insights remain transparent, and accurate

3. **Their customer support forum experienced results such as:**
 - a. One unexpected benefit was an increase in organic visits resulting in 90% of new visits.
 - b. A 53x increase in active users in their support forums within one year
 - c. A much more transparent analytics that allowed for seamless tracking throughout the website and forums

As Hootsuite's customer support channels continue to evolve, the team is ready to work with Vanilla to achieve new goals.

How to Calculate the ROI of your Support Community

According to [Forrester Research](#), they mention three qualitative benefits to measure and two lesser or soft metrics to consider.

New lead generation - How many new leads or prospects find your company through our online community, multiplied by your average deal size and lead close rate.

Example:

of leads that passed through the community x \$average deal size x Lead to Close Rate %
= New Business
10,000 leads x \$10,000 x 5% = \$5,000,000

Increase in lead close (conversions) - To calculate the ROI, take your previous year's close rate with the current year's close rate and calculate the delta.

Example:

_ 10,000 leads x \$10,000 x 6% = \$6,250,000
10,000 leads x \$10,000 x 5% = \$5,000,000
= \$1,250,000 (or a 20% increase in conversions)

Deflection of support calls - Take the total amount of unique visits to your customer community that come in from organic search that go to support section x 20%. Add in the number of support questions answered by the community and multiply by your cost per call.

Example:

[[200,000 unique visits x 20%] + 10,000 questions answered by the community] x \$10
= \$500,000

Ideation - Product improvement ideas that came through the community. Particularly valuable if it leads to higher conversions, more leads or deeper product adoption.

_ 12,000 leads x \$10,000 x 5% = \$6,000,000

10,000 leads x \$10,000 x 5% = \$5,000,000

= \$1,000,000 (or a 20% increase in new business)

Increased customer satisfaction scores - which directly ties into churn reduction and repurchase increase. Calculate your current churn rate with the community - the churn rate prior to your community and multiply the difference your active customer count and average customer value.

_ 100,000 customers x 2% churn = 2,000

100,000 customers x 1% churn = 1,000

=1,000 customers saved *\$10,000 = \$10,000,000

Based on the above calculations, the ROI of the customer community can be worth almost \$18M for a \$1B organization. Almost 2% of company revenue. Adapt the calculations to your reality. Of course, you'll want to include your costs for infrastructure and staffing.

Online Communities - the shortest distance between brands and their customers

Customer expectations have changed. They expect a more personal relationship with brands, and customers will reward companies that create friendly ways for them to engage—so they can get faster answers to questions, provide consumer feedback or gather information to make purchase decisions.

If your priority is to help your customers get answers to their questions in the way they expect to receive it, then focusing on integrating your support channels together is the first step to transforming your digital customer service experience.

As you know, the one-to-one relationship between a company and a customer is tenuous at best. It is a buyer's market, and with the variety of choices you're your customer has (especially for B2B technology industries), the relationship can last only days, weeks or months—not years.

Relying on a customer community as a pillar to your self-serve service option offers many benefits:

- Customers can find answers to their questions in their own words. They can use Google as their primary helpdesk and go directly to the community to find the answer.
- The content created by its members can be used by your organization for marketing, support and product feedback.
- Participants can turn into ardent brand defenders and advocates by jumping into heated conversations.
- An open and transparent community helps build trust with potential customers and illustrates how they can expect to be treated if they choose to do business with you.
- When your company's customer service strategy revolves around online community, you are making your customers a priority. The data gathered from a community-driven customer service, product ideation based on customer needs can provide tremendous new value and opportunity for your brand that moves beyond just dollars and cents.
- As customer expectations evolve with each new technological advance, it's the power of a branded online community that stays consistent in providing value to both brand and customer.



Online Community Forums. Reinvented.

More than ever, consumers of content, goods and services want a voice within a community that shares a common interest. Vanilla's cloud-based community software is the enterprise standard used by top brands to better engage customers, drive loyalty, empower advocates and reduce support costs. Founded in December 2009, Vanilla started as an open source project. Today, Vanilla powers over 50,000 online communities.

Visit VanillaForums.com to learn more about Vanilla.

[VANILLAFORUMS.COM](https://VanillaForums.com)

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