

CUSTOMER SERVICE HANDBOOK

A GUIDE TO GREAT
TEAMS AND CULTURES



by Reamaze and Friends

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1st Edition

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*For all the small businesses out there
winnin' it*



(from an actual fortune cookie we received)

Introduction



So we've decided to write a book

About us

Why we're writing this book

The right fit

Does this apply to you?

About them

The honest truth

So we've decided to write a book

Our little startup company has everything to do with finding one answer to a deceptively simple pair of questions: How do you make customers happy, and once they are happy, how do you keep them happy?

Ever since we started Reamaze, we've had a great deal of thought-provoking conversations with startup founders, thought-leading companies, and dedicated beta users.

This book is an exploration of our philosophies, their ideas, thoughts, and invaluable insights.

We believe that great customer support is a much bigger issue than batting support tickets back to where they came from in the smallest amount of time possible. Inspiring a community of users through customer support makes sense, both from an "it is the right thing to do" point of view, and as a business objective.

Happy customers are crucial for all businesses, whether you're just about to launch your minimum viable product, or you're a dominant player in your vertical. In fact, there is evidence that elegantly dealing with a customer who has a query, issue, or complaint, is one of the most valuable opportunities a company has to impress.

In a business environment where nobody operates without competitors, there's a very significant chance that you will be judged not on how well you do, but how well you deal

with the inevitable situations that occur where something goes wrong.

We hope this book will help you navigate the minefield of opportunities that is customer support.

About us

We are the small team behind Reamaze, a simple-to-use customer support tool designed for small businesses. Reamaze helps you have more meaningful and valuable conversations with your customers.

We've decided to build our business around the idea of solving the big questions around customer support. We discovered that complex ticket management, overkill analytics, bloated delivery systems, useless features, and 2-month learning curves actively detrimental to the core function of delivering great support. Instead, Reamaze focuses on simplified multi-channel support, meaningful metrics, streamlined collaborative features, and integrated CRM tools to help you build relationships with customers and deliver great support.

Our philosophy has always revolved around generating positive traction with customers. Today, everything we build revolves around the meaningful interactions we have with customers. We're adamant about running customer support ourselves with a highly personal and exposed visage of who we are and what we represent as a company.

By having personal conversations with as many customers as we can, we've built a reputation of always being there – for everyone. We see higher conversion rates when we are able to have one-on-one conversations with customers to understand their troubles, issues, and needs. It also means the world to them when their feedback become tangible realities.

The more we know about customers, the more confident we are during conversations. The more conversations we have, the more customers enjoy our products. Complaints turn into feedback, issues become talking points, and a no becomes a yes.

Why we're writing this book

There is a fundamental shift happening for businesses around the globe. Large corporations were dominant players in almost every facet of business-to-consumer business just two decades ago. These large businesses made a prudent investment in their customer support operations in the name of efficiency, and to cope with ever-rising demand.

The rocket-ride to success was not without a hitch, however. Efficiency and mass-producing customer support turned out to carry a heavy cost. The growing price tags eventually reached their logical corporate conclusions, in a divide defined by impersonal call centers, robotic help-desks, and the dreaded ticketing concept.

In short, companies forgot what it meant to understand customers and instead focused on how to decrease the cost associated to supporting each customer.

Today, startups and small businesses are burgeoning everywhere fueled by the transformative powers of technology and globalization. And while there will always be large businesses and corporations hedging the top tiers of any given industry, more businesses are opting for a smaller, tighter, and leaner operation to serve a more focused niche.

"The customer support landscape has changed quite a bit since the 90's. The technology we're working with today can vary quite a bit in shapes and sizes because we're no longer dealing with licenses or long-term subscriptions but more of a 'pay as you' payment framework. We've got people that are spending lots of money every month running entire call centers, and we've also got the weekend hackers and basement developers depending an entire business on Twilio. From the support perspective, it's catering to different kinds of customers that is most crucial."

Jason @ Twilio

Customers are back in control again. They no longer have to deal with sleazy call centers, "press 1 for support" robots, and outsourced support teams. They don't have to

buy from you if they don't want to. Just two decades ago, it was perfectly appropriate to deliver customer support via mass distribution. Customers were okay with waiting on the phone, waiting for emails, and waiting for businesses in general. This is no longer true. The smaller, tighter, and leaner businesses of today will need to interface with customers more frequently through rapid iteration. The level of intelligence, intimacy, and finesse needed to deliver great customer support experiences are evolving as well. How will small businesses cope with this evolution? How will these evolutionary changes affect the nature of building a successful business? And what role should customer support play here?

"We have a chance to make a strong connection with customers who we talk to actively. And that's what counts. We prioritize customer interactions and integrate it with our product roadmap. Having really great conversations will be valuable enough to ensure a customer stays with you. If customers don't feel the respect of their voice being heard then they will look for alternatives."

Courtney @ Eventbrite

We want this book to help the next generation of small and medium sized businesses from technically savvy startups to hip mom-and-pop shops. We want to help them do customer support right.

The right fit

If you want to build brilliant customer support teams and cultures then this book is for you. Leave everything you think you know about customer support at the door, for now, because we want to show you how to build a customer support operation that is smarter, faster, and better in every way.

Whether you're a customer support manager, customer experience director, startup entrepreneur, or a small business owner, this book will help you cut through the noise and get down to what's really important: conversing with customers in an efficient and effective manner.

Does this apply to you?

The fact you're reading this book means you've already realized the importance of customer support. You realize the old ways of the support center is long gone. The need to meet customers where they are has changed the playing field for competitiveness.

Customer retention is ever more pressing in this recovering economy. You might be having a hard time seeing the right place to start or simply having trouble shaking that sleazy call center vibe. Or maybe you're not yet on board with customer support being all that valuable but are eager to see what others are doing.

We're not going to beat around the bush and try to shape customer support into something it's not. However you cut it, it is hard to get around the fact that a solid customer support component of your business is a crucial part of a path to success.

When done right, a customer-centric business culture can be stupendously fun, amazingly rewarding, and incredibly valuable. We want to help you do it right.

This customer service handbook is about:

- Recognizing the problem with customer support and overcoming stereotypes.
- Understanding the true value of a customer support team, and turning it from a cost center into an opportunity/revenue center.
- Focusing on people and conversations, staying relationship focused, and embracing adaptation.
- Setting expectations. Expectations ranging from customers to employees will define how cohesive your customer support team will be with the rest of the company.
- Maximizing benefits and value from communicating with customers for your business.
- Identifying inevitabilities and making sacrifices. There are some things you cannot do without and

there are some things you can. Learning to cope with either will help you scale.

- Your company and your product.
- Team building, brand building, and culture shaping.
- Delivering genuine awesomeness that is sustainable, efficient, and effective.

Strategies from this book will be applicable whether you run a “lone ranger” support operation or a power team of 20 customer support ninjas.

Many of the ideas outlined here extend beyond just building customer support teams. You’ll find ideas about overcoming stereotypical processes, setting expectations, emphasizing consistency, team building, and transparency.

About them

We know we have a good understanding of customer support, but we didn’t grok it all out of thin air. Our experience comes both from first-hand experience, and from in-depth conversations with those we respect the most: the businesses who are getting customer service right.

A large portion of this book are contributed by the awesome people and companies dedicated to providing

amazing customer experiences. We want to thank them for their time, knowledge, and friendship.

Here's a bit about them:

Eventbrite is an online service that people everywhere use to create, share, and join any event imaginable. Founded in 2006 by Kevin Hartz, Julia Hartz, and Renaud Visage, Eventbrite quickly gained popularity among event planners all across the world. Eventbrite is headquartered in San Francisco and has been selected as one of the best places to work in 2010 and 2011. It was also nominated for the 15th annual Webby Awards. Courtney Duhring is a Manager with the Client Services Team at Eventbrite.

Ideeli is an online retailer that offers limited-time sales of brand name products. Founded in 2007, ideeli is now ranked by Inc. as one of the fastest growing retailers in the United States with more than 6 million members and 1,000 brand partners. Ideeli is headquartered in New York City and now operates the entire 45th floor of the New York Times building. Jason Faria is the Director of Customer Service at ideeli.

Mailgun provides a web service for integrating email inboxes into web apps through a simple and intuitive API. Mailgun was part of the Winter 2010 Y Combinator (a Silicon Valley startup incubator) class and rapidly gained traction among developers. In August of 2012, Mailgun was successfully acquired by Rackspace to provide Rackspace hosting customers with cloud-integrated email services.

Taylor Wakefield is the Co-Founder and Chief Operating Officer at Mailgun.

Oodle is an online shopping and marketplace provider based in San Mateo, California. Founded in 2005, Oodle operates a network of online marketplaces with more than 15 million monthly unique users and is considered the largest classifieds aggregator. Oodle powers entities such as Facebook Marketplace, ForRent.com, and aggregates classifieds for companies such as AOL and the New York Post. In December of 2012, Oodle was acquired by home shopping giant QVC to extend home shopping into the social realm. Llewellyn is the Director of Customer Service at Oodle.

Outright provides a simple online bookkeeping application for small businesses, entrepreneurs, and the self-employed. Founded in 2008, Outright is considered one of the most customer friendly apps for small business needs with over 200,000 customers. In July of 2012, Outright was acquired by GoDaddy to further help small businesses grow. The two companies are now committed to providing easy-to-use, affordable solutions for small businesses. Christie Strasia is the head of the Customer Care Team at Outright.

Stripe is one of the fastest growing startups based out of San Francisco, California focused on making accepting payments online easier. Stripe is backed by PayPal founders Peter Thiel and Elon Musk, as well as Sequoia Capital, Andreessen Horowitz, and SV Angel. When asked how Stripe is different from PayPal or other online

payment platforms, Stripe answered: "It doesn't suck". Michael Schade is head of customer support at Stripe.

Twice is a startup in the online secondhand clothing space. Twice differentiates itself from competitors by being 100% focused on its concierge-style market place. Items sent in by Twice sellers are professionally evaluated, photographed, and marketed. Founded in 2011 by Noah Ready-Campbell and Calvin Young, Twice is rising in popularity and expanding its brand coverage at a rapid pace. Lauren Heminez is the face of Twice, a one-woman customer support operation. She is the community manager, the customer support superstar, and the friend you can always rely on.

Twilio provides a cloud communications solution that allows developers to make and receive phone calls and send and receive text messages through a web-based API. Founded in 2007 by Jeff Lawson, Evan Cooke, and John Wolthuis, Twilio has over 150,000 developers using its platform. Twilio was nominated for the "Dow Jones FASTech 50 Startups to Watch" list for 2010 and The Business Insider named Twilio as one of the "20 Hot Silicon Valley Startups You Need to Watch" in 2010. Jason Nassi is the Director of Customer Support at Twilio.

The honest truth

You don't have to do a lot of customer support before you realize that no two customers are the same. That rule

scales rather well: No two companies are the same either, and as far as customer support goes; what works for one company, may not be ideal for another.

The ideas, thoughts, and strategies outlined in this book are tried and tested, and they work very well for some companies – but we would recommend against reading any of this as iron-clad, diamond-studded gospel.

We didn't write this book to be a one-size-fits-all guide to customer support, and we see this book as more of a set of starting blocks: If you're going to be running at high speed, we'd love to point you in the right direction to start with, at least. Just remember to do with customer support what you do with your business on the whole: Try, measure, adjust, and repeat.

If it helps you put your company on the right track, and if it is of assistance in leaving your customers with ever-so-slightly bigger grins on their faces, then you're very welcome.

Will the strategies outlined in this book work for me?

We don't know.

This book might be the perfect companion for those of you who are just starting to think about customer support and want to do it right from the get-go. On the other hand, if you're the manager of an enterprise support center, then the usefulness of our content might be severely limited.

We are sure you'll be able to pick up a few things here and there to illuminate what you're currently doing. Some of the ideas we've accumulated from highly successful companies will surely satisfy your sense of curiosity. If you're thinking about implementing something in the way we've outlined, just take precautionary measures and make sure it's aligned with your goals and interests.

What about the nuances of customer support?

We'll be the first to admit that we're avoiding some of the most complex and intricate questions, and some of the most specific issues facing businesses. We're avoiding complexity on purpose because we don't believe customer support needs to be complicated. And we're not claiming to know everything there is to know about building customer support teams at multinational corporations. What we do know is that building a support team shouldn't be mind numbingly hard if you want to start small, start right, and still be able to deliver awesomeness.

What about our established support operation?

Even big companies are rethinking their customer support strategy. Talking to more customers in more intelligent ways is guaranteed to help adapt your business to changing times. This book is about looking at customer support under a different light, running your team at a different pace, and cutting out the excess noise that is so prevalent in call centers.

Companies we highlight in this book will help you see how some of the things they do in large team settings can still reflect a lean mentality.

There's no need to gut everything you have and start from square one. Take some time to evaluate the ideas presented in this book and see if there are low hanging fruits that you can pick off without heavy investments. Think bite-sized chunks. If you want to be experimental and bold we welcome you to internalize some of these ideas and start incorporating them into your daily routine. A big part of building great support teams and cultures is having the ability to incorporate all facets of the business into your routine.

The Problem

Do you have one?

Why customer support?

Misconceptions and stereotypes

Fixating on irrelevant things

That annoying cost center

Seeing the connection

Do you have one?

The origins of customer support always seem to be an organic one. As soon as you bring a product to market, the need for customer support becomes an essential part of doing business.

The inherent nature of this phenomenon means no matter what type of business you are, you also have a customer support operation. The question is how good or how bad it is.

Misgauging the pressure on your customer support team as your business scales is often the root cause for headaches. When you're just starting out, it might be counter intuitive to see how your investments in customer support can be inversely proportional to how fast your business is growing. For example, the public beta period for a technology startup, where the user base is growing but product and revenue growth remains relatively flat for a short amount of time, is actually the most crucial time to focus on getting customer support right.

Depending on the type of business, the risk of developing chronic customer support problems originates from in between the two ends of this spectrum:

- I. Focusing too much on other areas of a business and neglecting the importance of customer support (questions, concerns, feedback, etc.)

- II. Focusing too much on customer support by over anticipating the growth of a business and weighing it down.

Before starting our company, we worked at other startups where failures to address the above forms of risk led to complications that were much harder alleviate later on.

Startup A delivered an innovative point-of-sale e-commerce platform for merchants. Because e-commerce fluctuates seasonally, Startup A added new support processes and agents constantly in “preparation” for spikes in traffic and support volume. The original team, composed of two dedicated support agents, quickly grew to a team of more than 10 in less than half a year. The excessive emphasis on customer support, which should be given credit, resulted in the over-complication of tools, processes, and personalities which were unfit for a startup.

Startup B delivered online communities for buying and selling used goods. Startup B focused the majority of its time on delivering a better and more secure shopping experience. Investments into finding a suitable tool and building a process around supporting customers were marginal. Support staff relied on hacked together tools from bug trackers and project management apps. The website and product reflected this mentality by making it difficult for customers to contact support. This over emphasis on building the best product detracted the ability for startup B to adapt to the needs of its customers.

The answer to whether or not you have a problem with customer support cannot be simply a yes or a no. Start to think about your position as a balance between the two poles. Seeing and feeling the pull from either pole will help shape an approach to building a well-functioning customer support atmosphere.

Why customer support?

You'll have to forgive us this bold claim: Customer support is immeasurable – it is too valuable to measure. Support touches on every aspect of running a business from marketing to product development, and from engineering to business development and sales. Because customer support's range is minimalistic in function but so universal in application, it often plays the role of an unsung hero. This characteristic is also the reason why customer support can oftentimes be over-valued or under-valued.

"I think it's crucially important to focus on support especially early on in a product's lifecycle: 1) it creates a feedback loop that helps guide product development and 2) good customer support is a very effective differentiator and word of mouth marketing tool."

Taylor @ Mailgun

One important caveat is of course the size of your business and the product/service you're delivering. While large companies may benefit from having a customer support team that is more dedicated to helping end-users and less connected to other business elements, smaller companies benefit immensely by having connected teams and a system where customer support becomes an external-facing extension of internal business processes.

"We are the front door to what needs to be changed, fixed, and what customers are asking for. We're the wealth of knowledge that provides insight into the product and into customers' brains. Companies that don't view customer support this way are really at a loss."

Christie @ Outright

Misconceptions and stereotypes

To be honest, we don't like the way people cringe when they hear "customer support". Unfortunately, we can't blame them for their harsh criticisms when so many companies do it wrong. Just do a simple Google Images search for the term "customer support" and you'll see what we're talking about. Actually, don't - it's pretty depressing viewing: cartoons of sleazy call centers and stock photos of support agents smiling absurdly are common results that haunt.

To be fair, we believe that a lot of these misconceptions come about because too many companies are trying too hard. They're trying too hard to look professional, sound professional, and feel professional. This sort of treatment is immediately noticeable because most "professionals" are a pain in the ass to deal with.

The simple truth is that these stereotypes come about because your staff is forced to become professionals when they're much better off just being themselves.

"Overcoming stereotypes is definitely difficult. Sometimes thinking too hard about customer support can actually make it worse. I think amazing customers on a daily basis by getting back to them swiftly or replacing an autoresponder with a genuine email are great simple first steps. It shows that we truly respect their time."

LLewellyn @ Oodle

The goal here isn't to shape a customer support team into a professional team but into a well functioning relationship-building team. If you want to build a "professional" customer service team then this is not the book for you. A "professional" support team means:

More rules

More constraints

More management

More tools

More no's

More scripts

More run-arounds

More delays

If fact, we'd argue that a customer support team with less professionalism, less constraints, less rules, and less metrics can outperform one with more of everything. This obviously doesn't mean your staff shouldn't present themselves well and remain polite. We'll cover more of this concept throughout the book.

To overcome misconceptions and break stereotypes, you must stop thinking about customer support as a professional services branch of your company and more as an integrated identity that you feel comfortable exposing to the public.

Fixating on irrelevant things

There is a barrage of irrelevant things that can bog you down when you're just starting out with building a customer support team. Keep in mind that you neither want to over invest by over valuing nor do you want to under invest by under valuing customer support.

- **The right team size.** Our rule of thumb is: one is fine, two is fun, and three is game.
- **The right tools.** No tool is the right tool in the beginning. Stick with email, something you're familiar with right off the bat and easily scalable.
- **The right process.** There is no better process than talking as much as possible with customers, teammates, and other teams.
- **The best hours.** Your customers' hours are your best hours. Do your best to get back to them as soon as possible and leave out your operating hours.
- **Which canned responses?** This goes into our philosophy on canned responses. There is no greater waste of time than to write out pre-packaged responses for anticipatory questions. You're trading relationships for speed and the tradeoff just doesn't make sense. Canned responses can be done right. Keep reading for the secret.
- **The right budget.** This goes into our philosophy on why customer support is not a cost center. Spend as much as you need to but only enough to generate positive traction with customers.

That annoying cost center

It's easy to see why customer support can be a severe cost center if you take an abstracted view of a large company. The amount of staff and resources required to handle inbound volume makes measuring anything tangible murky.

Measuring the support team and culture you want to build after the yardstick of a large company right off the bat is almost certainly going to fail you. The cost center mentality originates from the need to scale up infinitely. An excessive support workforce, bloated tools, phone support, 24/7 support, international support, live chat, advanced ticketing, SLAs, security, and many more, can quickly add up for a small business. These things divert attention from what's really important and valuable in a support team.

Thinking about customer support as a cost center is a mental state, not a fact.

The key is to avoid the cost center mentality by avoiding the large company model and embracing the lean mentality. This won't come as a surprise to anyone who's read anything embracing the lean startup movement in the past decade, but let's restate it for the record anyway: A great way to start out is to start small.

At our previous startup we needed a way for engineers to support non-technical teammates with a variety of questions. We established a simple process for

communicating, sharing, and cooperating using simple tools such as email.

When we launched our public beta we took that same internal support process and made it public facing. Refinements to the process were made with no additional investments into new staff or tools. By not sinking unnecessary costs into customer support, we were able to clearly see the value it created.

Think of it this way, because value derived from customer support runs on a longer realization cycle, the cost associated to maintaining a large investment adds tremendous pressure on a business. By keeping your initial team small, tools simple, and process clean, you can devote more time to focus on building relationships with your customers and actually helping them. This positive value generation is crucial to getting the early stages of your customer support team and culture off the ground.

Seeing the connection

Try this statement on for size: Helping your customers is helping yourself. Feels right, doesn't it?

When you set out to help your own teammates you are essentially building the cultural foundations for a great customer support team. When you realize that the two are essentially two sides to the same coin you'll understand how true value is generated from the relationships you're

able to build – not from the tools or process you choose to adopt.

"Customer support is such an important selling point that more businesses should list it as a feature. Think about it, other than the product itself, customers actually count on us to help them through everything. Ideally, companies wouldn't even need to advertise great support since all support will be great. That's when we can truly break down stereotypes."

LLewellyn @ Oodle

Starting Out

What do you want?

Defining culture early?

Stay lean

Picking a tool to start

Who does what?

Be yourself

What do you want?

The wrong question to ask probably involves “how”. The “how” is simple to answer relative to the “why”.

When we started building Reamaze, we were sick of the tools out there that practically forced you to think strictly about features, glitter, and price.

Our personal experiences with customer support and the revenue/retention we were able to generate by simply building great relationships taught us one simple lesson: your customers don't give a crumpled crap about any of those things.

Why are you reading this book?

Why is customer support important to you?

Why do you think customer support is valuable?

Why is customer support so dependent on culture?

Why is it important for your teams to bond with customer support?

...And so on, and so forth.

It shouldn't be hard to answer these “why” questions. The simpler your answers, the easier it will be to build great teams and cultures.

The trick is to focus on what you're ultimately trying to achieve with customer support and you'll see past those stereotypes and trivial issues.

Defining culture early

Simply put, culture is just a set of commitments. And commitments are just sacrifices and compromises you're willing to make in exchange for a desired outcome. The earlier you establish commitments, the easier it will be to shape culture.

The most typical causes for failed commitments are distractions, shifts in priorities, and the inability to balance available resources. Picking up commitments while your company is young and not overburdened with other hot-button issues can be a godsend. Identifying necessities and sacrifices is far more straightforward.

Culture is like a fast moving object. It has momentum. It's hard to change the direction of an object full of momentum. In contrast, an object with less momentum can easily change directions to find a more optimal path.

Stay lean

You might have heard of the lean startup methodology before. The same "less is more" and "rapid iteration"

mentalities for product development can be applied to customer support as well. Because customer support is your public-facing image, you need the team to respond quickly to customer concerns, to communicate effectively to potentially thousands of customers in short time frames, and to delegate what customers need versus how other teams prioritize features. This is a good thing. It requires you to think about customer support more as a product than simply another internal process. Customer support is such a crucial extension for your business; it needs to remain agile and nimble.

There are many things you can do in the beginning to avoid accruing too much excess weight:

- **Hire with caution.** The biggest urge to overcome is to constantly hire new staff for customer support.
- **No decisions are ever final.** Customer sentiments change and you need all the flexibility you can muster to change with it.
- **Don't commit to too much.** This applies to both internal commitments as well as commitments to customers. Committing to too much is equivalent to not having a culture.
- **Learn to say "NO".** You simply can't agree and build everything. Just say "NO" in the right way.
- **Adapt.** Everyone needs to be on the same level and page in order to be agile. Encourage your team to

wear multiple hats and multitask.

- **Don't over invest on tools.** Heavy tools will only burden your team and skew your process in order to take advantage of those "features".

"Even though we were consciously aware of this issue, we still did not limit our feature set enough. Early on it's really hard to say no - you are so grateful that someone is actually using your product and you want to please everyone. It takes a lot of discipline and the effect it has on your support and tech debt can be dramatic."

Taylor @ Mailgun

Leanness is a culture and deciding what's not a part of your culture is just as important as what is. Always make decisions that you'll eventually grow into without sacrificing what's working at the moment.

"A lot of frustrations, both for agents and customers, come out of the fact you have to follow certain roles, rules, procedures, or policies that don't necessarily make sense because they were written either so long ago or because they are so far removed from what's actually important. If something doesn't make sense, there's no reason to keep doing it. We like to be agile

in everything we do, including customer support"

Jason @ Ideeli

Picking a tool to start

If you're just starting out there are no better tools for us to recommend than email and a VOIP provider. Email is flexible, adaptive, and still very professional. Email can also be very timely without getting you deep into the weeds of fancy features. It is still the most direct way of reaching your customers and the option that most people feel comfortable with. It's free (for the most part) and just about everyone has an email address. Email also has just about every auxiliary feature you need such as scheduling a meeting, sending an attachment, copying different people, forwarding, notifications, security, labeling, grouping into different folders, chat, etc.

"Given our team's growth, handling our email turned out to be an interesting decision of its own. Up until very recently, all email was handled through Gmail as we really wanted it to be people talking directly to us - not referencing a ticket number or being forced to reply above a certain line. We wanted to maintain these properties while having something that helped us understand all of the active conversations

and distribute the work. We toyed around with hacks within Gmail (labels can be pretty flexible), but are now experimenting with other systems. It's necessary for us that, regardless of the tool we decide to use, we're not restricting our users from communicating with us however they're most comfortable."

Michael @ Stripe

VOIP providers such as Google Voice and Skype are great tools that are free and flexible enough for you to adopt and discard as you move along. They're professional and won't cost you anything to try.

Rather than comparison shopping different customer service applications, start by thinking about how you want to interact with potential customers, through which primary channels, how intimate you want the conversation to be, and how you want customer support to represent your business. These are far more important concerns than which tools to buy.

"We focused on strong customer support from the beginning. We've always had a chat app on the website and we were very focused on response times to emails. In addition, we would offer personal phone

and Skype contacts to customers - almost acting as pro bono email consultants."

Taylor @ Mailgun

Many will also tell you that you need a social network presence if you want to succeed. Perhaps a business page or an inbound alias of some sort will help. Not quite true for customer support. We're going to tell you to lay off on these matters when you're just setting up shop.

Having a social network presence in the very beginning only compensates for the lack of a large marketing budget. You feel the urge to publicize yourself and find fans. If this is the case, treat this as community-building rather than customer support. Building your social network presence is an entirely different book. The simple fact is that not many people will be reaching out to you through these channels for support related issues in the beginning and diverting too much attention at this point is counterproductive.

Instead, actively push customers to contact you directly via email. There are several notions you can establish with customers right from the get-go:

1. You are confident and not afraid to chat.
2. Your company enjoys intimate conversations rather than quick bursts of sound bites.

3. You are personally reachable and visible in a noiseless channel at all times.
4. You are actively accountable and transparent.
5. You take customer support seriously.

Who does what?

Customer support is genuine only when you have a vested interest in making those who pay you happy. That's the simple answer. What you choose to do with that information is up to you.

Based on our interviews with founders of rock star companies, 100 percent of them ran customer support themselves at some point. Customer support is, and always will be, the most direct way to gain insight into how customers are responding to your product. As founders, it's crucial to know who constitutes your customer base, how your product impacts customers on a day-to-day basis, what you're doing right and what you're doing wrong, and why some choose to come aboard while others choose to abandon ship.

"When the company first started out, there was no support team. Support was done by the founders, developers, and the developer evangelist team. Even now, every new employee that joins Twilio does a rotation

in support. It doesn't matter what role they're going to play but they do their first two weeks as an integral part of the support team. That way, they get a better understanding of who the customers are, the kinds of problems they run into, as well as getting a deeper understanding of what the products are."

Jason @ Twilio

One thing to be wary of when you're starting out is to avoid assigning roles. Everyone should be doing customer support. If your team is small, make it a priority to level with everyone involved and get them on the same page with customer support.

Their technical prowess or academic background is irrelevant. If anything, this is a great opportunity to cross train your teammates.

"We've held support at a high standard at Stripe since before we even had a name. Everyone at the company was hooked up to a Pager-Duty schedule so we'd be called whenever one of our users encountered an error; this offered us the flexibility to proactively reach out and make sure everyone was taken care of. Since then, we've continued trying solutions like the phone call rotation until they can't scale anymore. With our community chat, we

would receive a phone call whenever someone went unanswered for a short period of time."

Michael @ Stripe

If you must put a number on it, we recommend choosing just one or two teammates to be on the starting lineup for customer support and talking to customers in a progressive manner. This person should be a multitasker and be willing to move in between teams. We'll dive into this topic in more detail later on in the book. This will:

- Keep the overall framework and structure for your support team lean and flexible.
- Limit excessive input into how a "team" should be run in the beginning.
- Concentrate and funnel customer feedback through just one or two people.
- Make delegating easier and more fluid.
- Make intra-company communication with customer support consistent and manageable.

"While we've grown from one to seven Stripes that work on support full-time, we have started learning how to efficiently scale a high-touch support experience. Part of this has been just with

figuring out how best to allocate our resources; for example, we've recently changed how we triage incoming emails so that we're utilizing each person's expertise. It is paramount to us that any of our users be able to get in touch with a highly-skilled person."

Michael @ Stripe

Be yourself

Think about this for a second: Do you enjoy talking to robots?

Customer support is and should be simple: having a close-to-heart and down-to-earth conversation with someone. It's necessary to encourage identity transparency through conversations with customers. Differentiate yourself from traditional support centers by recognizing and embracing smallness. Being small allows you to promote intimacy and personality, both externally and internally, on a level that is unattainable for oversized support centers.

And because you're small, you deal with less drama, less red tape, less constraints, and less "professionalism" by birthright. Allow freedom of expression from your teammates to show through.

Enable your staff to talk freely with customers by not emphasizing things such as industry-specific jargon, formalities, canned responses, stringent rules, and ticket numbers. A staff member is humorous by nature? Encourage it! A teammate wants to sign off with “Cheers!”? Allow it. Want to be quirky with greetings? Why not? This not only keeps customers feeling close but also gives your staff vast amounts of breathing room to think outside the box.

Encouraging your staff to be themselves forms the basis of your customer support culture and minimizes the distance between company and customers. Don't forget this important element as you grow in size.

“We're really aware of how entwined our roles are, and our familial bond as a team drives that desire to make sure we're all on top of our responsibilities. Whether it's our weekly employee lunch or unwinding with beers after work, we make it a point to not just be robotic bodies working in the same place and to really spend time getting to know each other. Making this effort increases everyone's happiness, sense of belonging, and promotes a perpetual need to be great at what you're doing so that everyone can succeed.”

Lauren @ Twice

Expectations

As the CEO

Musical chairs

Singing the same hymn

Train to liberate

Cross fertilize

Instilling belief

Trust is a two-way street

As the CEO

Certain things are expected of you if you're the CEO. Making sure customers (and shareholders) remain happy is pretty much your *de facto* job description. You represent the face, the identity, the aspirations, and the goals of a company. Not only do you need to be inward-facing you also need to be public-facing. The same story is true for those of you who manage others. Building a customer support culture that is not only accountable and transparent but also personable and approachable begins at the top.

Founders and co-founders need to be great at supporting customers. You're not expected to spend all day conversing with customers but you should make it a habit to "hang out" with customers and to learn about their anguishes, satisfactions, and discontents.

"I think the best way we align customer support with our philosophy is that everyone take turns at support so we can all identify with the customer. It's definitely not operationally efficient to have our senior developers on support chat but customers really appreciate it and it gives developers a good perspective, as well."

Taylor @ Mailgun

Customers can see and feel this while your teammates can understand and appreciate this. You need to lead by example and continue to set examples even when you're too busy to care. Remember that culture is just a set of commitments. Once you've decided on what sacrifices you're willing to make in exchange for certain outcomes, rewards will come naturally.

"The customer-oriented culture has always been here at Eventbrite. Providing support is not just about answering calls and emails; it's about engaging on a deeply human level, problem solving, and cultivating the quality of our marketplace to propel the business forward. Everyone in the company plays a part in offering that support. We have a weekly all-hands team meeting, during which, members from other departments volunteer to answer calls while we're away. This is exciting because it gets the people who build the product in an environment where they can directly witness the value they've added to the customer experience. Inspiration comes from the top too. Since Day 1, our CEO and President have put the utmost priority on support. If there was any need for fueling motivation, it comes from seeing them volunteer to answer calls."

Courtney @ Eventbrite

Musical chairs

Speaking of spending time with customers, everyone should do it. At our previous startup, everyone did customer support. Every new hire, whether bizdev, sales, pm, or engineering, spent time “manning the ship”. The idea that the company’s identity and success was crucially dependent on a ship well steered fused together a strong customer-centric culture.

By understanding the full gamut of customer feedback, questions, frustrations, and satisfactions, any employee should be able to apply their core skill set(s) to at least one of those areas. Other startups we’ve hung out with tell us that customer support is one of the most crucial hinges that connect the outward facing side of the company to the inward facing nature of running a business.

Singing the same hymn

There’s nothing more important than aligning everyone’s interests and expectations early on.

In small-team settings, do your best to build in a rotation system where every member spends 30 minutes to an hour every week (or any set interval without becoming overbearing) answering customer emails and triaging requests.

The goal isn't to turn every member into a support superstar but to give everyone a solid birds-eye-view of the land for how customers are reacting to the business and to instill a deeper sense of appreciation for the value a business is delivering to customers. Avoid outsourcing customer support to a single team, or worse, to a third party. Everyone in your company needs to know what makes customers tick. It's also not uncommon for team members from other departments to draw inspirations from meaningful customer conversations.

"Aside from the seven of us who work full-time on support, there's also a rotation that involves the other Stripes. The goal here is to make sure that each and every one of us are interacting with our users and continuing to bring fresh ideas; it's one way we learn how to make Stripe better for everyone. The rotation itself isn't our final form, but it's what we've found effective so far. We are planning to continue experimenting with this to find the best way to help everyone at Stripe bring their talents to a user-facing interaction."

Michael @ Stripe

When you reach out to us at Reamaze you can be sure that our CEO will get back to you once in a while. You'll also systematically hear back from engineers, designers, and marketing folks. We treat each customer conversation as a unique way for us to learn about that customer, to build

on that relationship, and to learn something about ourselves.

As much as we like data and analytics, they're nowhere near as effective as hearing about something directly from customers.

“As a client services team member at Eventbrite, you're an advocate for customers, you're a product expert, you're troubleshooting technical issues, and you're also sharing best practices. There are so many facets to this job. Transparency is key for connecting with clients, and it ensures that we're setting clear expectations within our conversations. If someone contacts us looking for a tool we don't offer, we won't fabricate a false promise; instead, we'll brainstorm immediate workaround solutions and record the feature request. And by tracking the request, it gives that idea a chance to be included in future product improvement recommendations we make.”

Courtney @ Eventbrite

Train to liberate

To have everyone on a level where they can operate effectively on a customer support team you'll need a hit-the-ground-running style training program. While some companies choose a strict regiment with lots of classroom instruction, simulations, and repetitious tasks, others choose to fully immerse new members and pair a mentor to them for assistance-based training. The possibilities are endless.

"We have a lot of working side-by-side with new trainees, vetting the answers before they actually go to customers, a lot of collaboration, and a lot of co-piloting and oversight. After they do it for 2-3 weeks with the comfort level, then we take the training wheels off. Prior to that, we have them shadow someone more seasoned. They might write up the answers but we always have a more experienced person edit their replies."

Jason @ Twilio

The path you choose will depend on what everyone on your team is comfortable with. Everything from the size of your team to the service you're providing will affect how efficient your training program will be. A basic framework to follow (no specific order):

- Treat customer support as a central training hub for all new staff members regardless of role.
- Determine an optimal length of time where any new staff member must spend in customer support (and nowhere else) to learn the in-and-outs of a product/service and the customers it influences. The goal is to help them focus on why they're there, why they're building something and the value they're adding.
- Building a successful business means long customer/user lifecycles. This lifecycle is (and should be) naturally longer than your support staffs' lifecycles. It's important to recognize churn rates in customer support departments as a natural order of things and prepare training strategies to cope with changing team compositions and to avoid downtime.
- Balance your training program with hard skills and soft skills. Hard skills include things such as learning a new technology or learning how to reproduce a simple bug. Soft skills include email composition, tone consistency, or phone etiquette.
- Mix up your training program to expose new hires to a wide variety of contexts. Email training, classroom training, sit-ins, and mock trials are just a few ways you can get someone on-boarded.

- Cut down on unnecessary internal team meetings. Instead, attend other teams' meetings in pairs and share interesting thoughts and findings. This is a far more efficient use of your teammates' time.
- Train new teammates to take an active role in becoming a cultural hub of the company. Because everyone passes through your customer support boot camp, you have unparalleled advantage in being the cultural glue where new and seasoned staff can connect, reconnect, and mingle. The customer support team is bound to be the most popular team!

We want to emphasize the need to take “training” out of its natural habitat and experimenting with it. Traditional training means entrenching someone in your mode of thought.

“Training to liberate” allows your staff to create opportunities for self thought, self discipline, and self actualization – a much more liberating way of operating at maximum efficiency without arbitrary constraints.

"I like to tell my team what I want the end result to be and give them the freedom to figure out how to get there. I give guidelines and goals but not rules and steps."

Christie @ Outright

Cross fertilize

Cross fertilization in business terms is the increase in interdependency and economic value among different bodies of knowledge in products and technologies. It may also mean the mixing of ideas and customs of different groups of people in order to make things better for all.

Building a culture where customer support isn't just a separate team babysitting complaining customers but a core business function facilitating teamwork, knowledge transfer, and culture among all departments is the foundation of success.

"We do share communication with our sales team. If we see a customer that we should reach out to in order to sell them a service, or if we want to help them learn more about our business, or give them a demo, or sell them into something else, we'll share that responsibility with our sales team."

Jason @ Twilio

Customer support is also well adapted to the trickle-down effect. A new direction voiced by the CEO can lead to shifts in priorities. This may lead to product or service changes which ultimately affect customers. Customer support is therefore at the receiving end of how changes are reflected back. A culture where other team members are well acquainted with customer support and customers

themselves can positively affect how decisions are propagated.

Be sure to also cross-train current customer support staff with other departments in the company that they have an active interest in. The goal is to encourage discovery and exploration.

By allowing your customer support staff to explore, you're not only excavating their innate interests, and perhaps making them more proficient team players, you're also earning your company extra returns on a hire with the possibility of internal transfers (re-hiring from within).

“We have plans underway for an internal cross-training program to give every employee an opportunity to expand their knowledge of each department at Twice-- from customer support to operations and marketing. Once we get this rolling, we plan on having every new hire learn the ropes in each departmental role. The more we all understand how each functional team affects the rest of the business, the better off we all are as a cohesive team. One wrong garment measurement could not only result in one more customer service email but also one more return, which in turn costs the company additional time and money.”

Lauren @ Twice

Instilling belief

Having a great customer support team demonstrates confidence in your product. And having that level of faith in the product or service you're building, the value you're providing, and the thousands of customers you're helping can be enough motivation to do an outstanding job every day.

Promote this by empowering your staff with enough authority and flexibility to make certain decisions that will help customers without having to go through supervisor after supervisor. Determine what that authority and flexibility might be and stick to it.

Being confident with your product and service instills confidence in your customers as well. Their belief in your product or solution heavily depends on whether or not they can feel you in their shoes. Being confident means you're willing to:

- Back up your claims
- Be accountable and transparent with your features, services, policies, prices, etc.
- Be there whenever customers need you
- Be honest even if it might cost you a customer

- Recommend competitor products or services when it's a better fit for a customer
- Go the extra mile to help someone out even if it's not part of the job description

"We're willing to help customers on all fronts because we genuinely believe that Outright is a great product. It's able to help them be better at their business. We back that up by being available all the time. We're not hiding behind any responsibilities. We also give our customers honest advice. If Outright isn't the best fit for them, we'll tell them that and even recommend alternatives. That honesty goes a long and customers understand that they can believe us."

Christie @ Outright

Trust is a two-way street

Transparency is the standard unit for trust. And to value the trust bestowed upon you by customers, you must understand the difficulty in earning trust over many years and many lifecycles. In times of urgency, your customer support transparency track record can make you or break you.

“The biggest advantage to having great customer support is that it adds an extra layer of trust, comfort, and ease that makes a customer want to come back. They’ll remember how easy it was to make a return or to change their shipping address, and they’ll shop with you because they trust that you’ll continue to create pleasant experiences for them.”

Lauren @ Twice

Don’t be afraid of owning up your teams’ mistakes. Instead, be proactive about apologies, reach out to customers so they can sense the extra effort you’ve put in to set things right, and make them remember that you genuinely care about how they feel because if you lose it, you’ll never get it back.

In the long run, eating the \$10 apology card, the \$30 replacement, or the \$20 voided shipping is far better than losing a customer.

Be as welcoming as possible to opportunities to show customers that you’re not hiding or hiding behind anything.

For example, here is an email we sent to customers when we botched something: “We wanted to let you know that we performed a small migration this morning due a bug in

our database found late last night. The downtime happened around 3:15 AM Pacific Time and lasted roughly 20-25 minutes. The fix has been issued and all services are restored. Your account should not be affected but we wanted to let you know just in case you notice something funny. If you do, please get in touch with us right away."

Being trustworthy upfront will earn you extra brownie points!

Delivering Awesomeness

The see-through culture

The implications of accountability

Speed is of the essence

Social media

Satisfy customers

Consistency

Love at first sight

Sparking happiness

Open communication

Canned foods never taste good

It's an opportunity to make some friends!

Help each other

The see-through culture

The counterintuitive aspect of transparency is how so much of it is not something you can simply just "implement". You cannot only decide to be transparent to your teammates or your friends.

Similarly, you cannot simply choose to implement transparency as a policy to your customers. It can be counter-intuitive, might be scary, and will be challenging. Building a see-through culture takes time, purpose, discipline, and accountability.

The upside, however, is huge: Deciding to deliver awesomeness is closely linked to the willingness to make mistakes and to change some of the fundamental principles that drive your business. You'll need to find a long term process that is not only agreeable for everyone on your team but one that is also applicable to other businesses processes beyond just customer support.

Transparency is a long term strategy. Be transparent about:

- Who you are.
- What you represent.
- What you can help with and what you can't.
Learning to say no to customers can be just as important as anything else.

- What you know or don't know.
- How you will help.
- Your processes for customer support and how they apply to customers.
- Your faults. You'll soon realize that customers value transparency far more than being pissed off at your faults.
- Features, services, pricing, etc. – at least as far as it's possible to predict these things with any level of certainty.

Historically, it's hard to get around the all-pervasive company culture around secrecy. This flies in the face of best practice around customer support, and transparency as a concept can, indeed, can be profoundly scary.

Being open with your customers sets their expectations, and can be a huge operating advantage in the long run. When you have a track record for being transparent, customers trust you to tell them exactly what you're thinking, how you've planned to solve their problem, or why you might not be able to.

Presenting transparency as a limit, or extent, to which your customer support team helps customers establishes a range in their mind for your service levels.

"As far as transparency, we try to be honest and up front as early as possible. No shenanigans. No ambiguities. No confusions. What you see is what you get. For service interruptions, we are as transparent as possible. We never want customers to notice a problem or an interruption before we do. When we're having a problem that impacts customers, we notify customers immediately. From there, if they have questions, they can contact us and we'll give them more information about how it impacts them specifically. If it does impact them, we reach out proactively. As we update the status board, we notify customers actively to alert them that service has been restored. We follow up with as much information as we can to prevent things from happening again."

Jason @ Twilio

More than honesty and aligning expectations, transparency is also about getting your real self out there. The general gist of transparency is to open up - open kimono style. Involving your customers in everything you do will settle any uncertainties they might have now or in the future.

"I encourage individuality to show through. But at the same time, I emphasize the need for a consistent tone. Our message can

show that we're in t-shirts and jeans and not suits and ties."

Christie @ Outright

Encourage your support staff to be free thinking and creative about how to present themselves and how to solve problems transparently. They'll enjoy conversing with customers a lot more and customers will enjoy them a lot more.

"Transparency is a part of making sure we're setting clear expectations within the frame of our conversations. If someone contacts us looking for something we don't offer, we can think of workarounds, and we'll offer them our thoughts, but we also try to understand why they're looking for a certain feature."

Courtney @ Eventbrite

The implications of accountability

Realistically, most people probably see accountability as an internal phenomenon where employees are held accountable for their actions. There are many different variations on the term "accountability", things such as rewarding accountability, the bottom up approach, the top-down approach, and whatever else you can think of. The sad point here is that 'accountability' is often synonymous with the blame game. This, in the context of

customer support, is counter-productive, if not downright harmful.

Accountability isn't about punishments, rewards, making excuses, pointing fingers, or accepting responsibility after-the-fact.

Accountability is an exercise in fact finding. This notion is even more important in a customer support context where mistakes are commonplace. Ideas such as rewarding employees for being accountable influence your support agents to become overly conservative in their actions, complacent in their attitudes, and overly compromising in their quality of work.

"We have a goal as a team but I don't hold each individual over their heads. We look at everything from the team perspective. From a philosophical perspective, I feel that putting a lot of individual metrics on the people is counterproductive for a support team. We need people to work together as a unit as opposed to individual competition between folks. We don't focus on other things and we don't hold them accountable for their day-to-day performance."

Jason @ Twilio

Framing accountability as a method for future proofing is far more productive. If something goes wrong, the question being asked should be how we systematically failed, how the process failed, and how to avoid such mistakes in the future.

Seeing accountability through this lens frees up mindshare and filters it down to its essence: the willingness, the desire, and the ability to demonstrate care for customers.

"It's also important for new hires to understand just how much trust and accountability we place in them. At the end of the day, we trust each person to make the best judgment call based on the information they've gathered to provide the best experience possible for the customer."

Courtney @ Eventbrite

And since you're unlikely to hire uninspired, unwilling, and undesirable people in the first place, how do you sustain a healthy level of willingness and desire in your customer support team?

- Encourage mistakes. The more mistakes they make, the faster they learn. They'll run out of mistakes sooner or later.
- When mistakes are made, admit them.

- No bottom-up approach or top-down approach. Treat everyone the same.
- If you're going to trust someone to talk to customers, trust them 100%.
- Value those who ask questions, those who become genuinely concerned, those who get excited about the little things, and those who challenge you.

"I look for teammates to be accountable to each other on the team level rather than the individual level. This makes everyone work together better."

Christie @ Outright

"My passion for ensuring the best for our customers is shared by the rest of the team and we're always very focused on our customers' needs. Every week, I share an report internally with the entire office, which includes a breakdown of customer service activities, issues we need to work on, and what we're doing well. When I find trends relevant to customer returns, or increases in customer requests for additional features to be built out, everyone in the office will know about it. We're very transparent about what's going on in our respective departments and we make it a point to share both successes and

challenges so that we can help each other out.”

Lauren @ Twice

Speed is of the essence

Customers love it when you reply fast. It's no doubt we're all spoiled by the swiftness in which we can obtain information.

Fact: Having customers who are willing to wait is truly a luxury. You need to adapt to this. That 24 to 48 hours timeframe is so 1990's. At Reamaze, we employ a “see it – take it” approach for customer support. As long as we're not busy with something else, we're getting back to customers on-the-fly (usually within 5-10 minutes for a first response and 30-60 minutes for a follow up response). Heck, we don't even use an autoresponder during business hours unless we expect specific spikes in inquiries.

"Basically, they just want someone to acknowledge them and provide quality feedback in a timely manner. Even if it's not the feedback they are looking for, they respect well reasoned responses."

Taylor @ Mailgun

Put yourself in customers' shoes. Reaching out for support creates anxiety! And waiting for your answer or acknowledgement over the course of 24 to 48 hours creates even more anxiety and frustration that might make them change their minds about you.

- Even if you might not have a solution right away, strive to send a personal comment to the customer to alert them that you are human and that you are working on answering the question.
- Being swift with “On-Call” responsiveness can reduce a customer’s anxiety significantly. They immediately understand that they’re in good hands, that the company is active and present, and that they can trust you.
- By eliminating potential anxiety, negative attitudes can often be subdued or counterbalanced.
- Give your social network channels even more priority for fast responses. For example, Twitter is not designed to be an expressive medium. It shines because it offers swiftness in short, rapid intervals. Incorporate this variable when you’re delivering support. Get back to customers as fast as possible and expand on the conversation in more detail later.

“It's absolutely crucial that we maintain communication with our customers in as timely a manner as possible. I'm always attached to my email to make sure I'm on top of our customers' needs at any given moment. I try to make my emails quickly readable, easily understood, and imbued with the warmth you get when you're having a genuine conversation with someone. I always let customers know they can contact me if they have any other questions at all, and they really appreciate that I leave the door open for any other lingering queries. Including preventative details is also something I like to do where it makes sense.”

Lauren @ Twice

Social media

While we're on the topic of social media, it's important to highlight some of its pros and cons.

There are many different ways to leverage social media for customer support:

1. Cast a wide net for your customer support team.
Have an identity in various shapes, forms, and sizes.
Your customers will have an easier time finding out

more about you.

2. Listen-in proactively to what your followers and fan base are saying to you and to each other on your social media channels. Take advantage of free advice!
3. Factor social media responsiveness into your marketing equation. If you're going to be hip and social, you need to back it up with enough firepower.
4. Utilize readily available information on different social networks to help you deliver short, yet still personable, conversations.
5. Make your customer support team engaging by starting relevant conversations whenever possible. Not only does this establish your presence socially but it also reinforces your customer centric culture. Customers will know that you've been listening.

Satisfy Customers

Customers will reach out to you wherever and whenever they want. Instead of focusing on which channels to support, focus on how you will meet customers where they are regardless of channel.

If you're not there to satisfy their urgency, three things might happen:

1. They will try to get your attention by coming to you politely. This is unlikely but not impossible.
2. They will scream and shout until you, and the rest of the world, hears them.
3. They will find a competitor who is willing to meet them where they are.

When customers have so much power vested in them by the powers of Twitter and Facebook, you will be wise to avoid tarnishing your brand by avoiding negative exposure.

If you are mentioned negatively, take the chance to respond humbly and invest in rebuilding the relationship publicly. This is the only opportunity left for you to show the world that you do care about customers' feelings.

"No one really talks about mediocre support but they might be willing to share really bad experiences. Likewise, they're also willing to share really good support experiences. So having good support gives Eventbrite really positive viral traction from social networks and word of mouth."

Courtney @ Eventbrite

Another area to watch out for is following up with customers. This is really independent of channels but can be a huge oversight for support teams. Not following up with customers after a concern has been brought to your attention can be the death of you.

Not following up with customers after you promise to do so will certainly be the death of you. Customers need to be satisfied by your replies and resolutions.

“I make sure to keep customers in the loop, even if it's a complex situation that takes days to resolve (i.e. a package lost in transit). It helps for them to know that we care enough to keep them posted throughout a situation, as opposed to leaving them in the dark until a solution is reached.”

Lauren @ Twice

Consistency

So far we've been suggesting more creative freedom, more engagement, less bureaucratic processes, and less of everything that detracts you from having genuine conversations with customers. Building a customer support team that values these concepts need one more concept for sustainability: consistency.

We don't mean consistency strictly in terms of standardized replies or greetings but also consistency in managing expectation and holding up commitments both externally and internally.

The greatest winners are not spiky winners but consistent winners. To increase the lifetime value of customers, a customer support team and its members need to be consistent winners over many years. One pattern easily overlooked is the notion of keeping customers happy. While the ultimate goal for any business is to turn non-customers into customers, success is determined by whether or not a business can keep customers around, engaged, paying, and happy.

"As a retailer, we just have to know who our customer is, how to keep them happy, and how to keep them coming back consistently. We need to identify who they are in order to best help them. That's one of our top priorities so we spend a lot of time learning about whom a customer is and what he or she wants."

Jason @ Ideeli

Love at first sight

Relationships in customer support are, in essence, dotted lines. Any dot and dash can represent a new found

relationship or a relationship rediscovered. In a way, customer support is about establishing first love experiences for new customers. And existing customers should consistently walk away with a feeling reminiscent of a familiar aroma and comfort that keeps them coming back.

- Make sure that a customer's first conversation with you is a pleasant one. Maximize and prioritize your staff's resources and energy to guarantee an extraordinary first encounter.
- Keep track of customers' conversation history and actively use it to your advantage.
- You want to be the business that customers can take home to show parents. Outstanding first-time experiences stand out among the crowd and can become your foot in the door.

First loves and the lingering effect in relationships for customer support are dashed lines. It involves rediscovery. What do customers experience when they rediscover you?

Sparking happiness

Great customer support teams simply do a great job at making others and themselves happy. Delivering great experiences don't have to cost an arm and a leg either. Most of the happiness comes from within. It's about care, commitment, and empathy. These qualities are what makes a customer support team great.

Listen to customers and do your absolute best to picture yourself in their shoes.

"As our Community Manager, I'm responsible for ensuring that each customer gets a positive experience to write home about. When an issue arises, I'll do whatever I need to do in order to gain that customer's trust back. I make it my mission to make sure that problems are not only resolved but also turned into pleasant experiences. It makes a huge difference when they know that you're not only going to fix things but that you genuinely care about making them happy! Many times customers feel better just knowing that the apology they're receiving is genuine and they understand that we aren't taking advantage of them."

Lauren @ Twice

"I'm always attached to my email to make sure I'm on top of our customers' needs at any given moment. I try to make my emails quickly readable, easily understood, and imbued with the warmth you get when you're having a genuine conversation with someone. I always let customers know they can contact me if they have any other questions at all, and they really appreciate that I leave the door open for any other lingering queries. Including preventative details is also something I like to do where it makes sense."

Lauren @ Twice

Open Communication

Cut down on the number of loops your team has to jump through just to get in touch with relevant people. Keep your internal communications channel as open as possible without intruding on others' privacy and priorities.

"Customer support teams should be communicating constantly with other teams. Customer support issues are one of the most important sources of market research, right alongside sales barriers encountered by folks focusing on new users. It's the case that everyone working

at Stripe is bringing something important. The people who focus on support do so because they care a lot about what our users' experiences are and want to communicate that back efficiently to make sure we're not leaving any potential improvement unnoticed."

Michael @ Stripe

Canned foods never taste good

Canned responses can be toxic for your small but growing customer support team and culture if not used responsibly. Many see canned responses as the best invention since sliced cheese. And who are we to refute that? Canned responses help you save time, power through your inbox, eliminate inconsistencies, and alleviate anger management issues quickly.

"Canned responses are fantastic. Most often times though, they're not used properly. We encourage our agents to take pieces of it and turn it into a hybrid."

Jason @ Ideeli

All these benefits might seem perfectly prescriptive at face value. But what you might not realize immediately through the over reliance of canned responses is that:

- People can smell bullshit. Canned responses will always look canned.
- Most canned responses are pre-written; meaning the context provided for every conversation is over extensive.
- Canned responses are, by definition, not short, succinct, personal, or direct messages. As a result, you're not taking advantage of the limited amount of time and attention you have with a customer.
- Your staff can easily become lazy, sloppy, and jaded. Nuances and creativity are easily overshadowed by the over reliance of canned responses.

If you're going to use canned responses, treat them not as readymade replies but as templates for each individual staff to expand on and add color to. These response templates should also be personal and not shared across the entire team.

“As for tools and processes, I couldn't live without canned responses. Not only does it add organization and uniformity, but having the basic skeletons of various responses prepped and ready for action leaves me extra time to add my own personality and

really make an extra effort to connect with our customers. No one likes to feel like they're talking to a robot!"

Lauren @ Twice

It's an opportunity to make some friends!

Everyone on your team must have the ability to craft friendships. Encourage your staff to step outside the bounds once in a while to spark an off topic conversation with customers. The great thing is that you don't need to do it intentionally.

Allow conversations to evolve. Roughly 20% of our conversations with users evolve in some way. Sometimes we'll chat about great pig-out spots in San Francisco, the ball game where Kobe just completely dominated, or a new meme that somehow made its way into our conversations.

Making friendly conversation not only helps foster healthy relationships, it can also diffuse angry and sticky situations. True story: we accidentally double charged a user for the month of December. The customer wrote an angry but polite email documenting our fault, complete with a partial screen shot of his credit card statement. In addition to the duplicate charge, there was also a popular pizzeria transaction. After we reversed the charge and apologized, we asked the customer whether the pizza was any good. It was getting late, we were hungry, and we hadn't had pizza

in a while. The customer replied: "Ha ha. Their stuffed crust is awesome. It's also my weakness :)"

"Since everyone came from support, they become best friends with people from other teams. No matter which team they go back to, that connection and bond is always present. Every team benefits from that. Support is close to everyone's hearts for that reason at Eventbrite."

Courtney @ Eventbrite

"Maintaining an authentically friendly and positive attitude can diffuse even the most disgruntled of customers, and it's always my favorite tool to use. It's really hard for a customer to stay mad when you're not only solving their problem but also relating to them personally and adding your sense of humor, too! People know when you aren't being genuine with them, and a fake half-laugh is hurting more than it's helping. Building a relationship with people to the point where they feel comfortable coming to you with their problems is essential to providing a high level of customer service."

Lauren @ Twice

Help each other

Engaged and informed customers are your best customers. In addition to you supporting them, give your customers opportunities to support each other. Well-versed and savvy customers love to help whenever they can.

"Our philosophy for having a community area was to remove the support team as a bottleneck. If customers want to get answers even faster than we can reply, we need to make sure they can achieve that and find answers themselves."

Christie @ Outright

A community comments system will give customers the ability to share thoughts and ideas in short blurbs. Having a comments system gives you more control over the topics being discussed.

Post new content, best practices, questions, polls, and other interesting factoids to pique your customers' reactions.

"While we try to surface as much information as possible to the documentation or product level so that people aren't forced to write in, we're always happy to spend time talking with our users, digging in deep to figure out an

integration, giving advice, or just generally having a good conversation."

Michael @ Stripe

Forums are great for organic customer support that fosters community-building. Active and passionate customers will often help others by posting neat tips, tricks, stories, and if you're lucky, hacks and workarounds.

Knowledge-Bases and Frequently Asked Questions (FAQs) are perfect for alleviating the pressures off your team as well. Document and publish most frequently asked questions, customer concerns, tutorials, and how-to's. Make your KB and FAQs accessible, prominent, and easy to navigate. You can also integrate a comments system for your KB and FAQ. If customers can easily access this repository of information, they might just hold off on sending you a message.

"The economics of this type of customer care are superior to anything that can be done with internal resources alone. When I did an analysis of a customer service organization at IBM many years ago, the codification of solutions into a knowledge base shifted first call resolution from less than 60% to over 90%. Customers were happier."

John Sviokla @ Harvard Business Review

Inevitabilities

The looking glass

Phone support

Is support a 24/7 business?

Service Level Agreements

Measuring performance

The toxic customer

The looking glass

Before we get started on more tangible inevitabilities, we want to address one of the biggest inevitabilities we believe is important for how businesses ultimately want to portray themselves.

Small businesses want to appear large, large businesses want to look “enterprise”, and enterprise businesses will do anything to feel small. This inevitability has transformative implications for how a business, as well as its support team, shapes its culture.

For us, we don't feel there is a need to be something we're not simply because it'll never be who we are. The need to remember and embrace who we are and where we came from is far more important for where we're going. Hopefully this will be a good lesson to keep top of mind.

Phone support

Having a public facing phone number will need to be seriously considered at some point. Customers sometimes feel more confident knowing there are real people they can talk to. Unfortunately, there is no right answer for when or whether you should even have one. It depends entirely on what phase the business is in, the growth of personnel, priorities, and maybe even philosophical beliefs.

Many businesses avoid having a phone number since it can overburden support teams. This is understandable if your support team is small. That said, as a growing small business, phone support can be quite charming if done correctly. Here is our advice for approaching phone support:

- Try it out with everyone on your team. Everyone should at least be comfortable speaking to customers over the phone.
- Pick a number that's easy to remember.
- A/B test different strategies for how customers might stumble upon your phone number in order to gauge its attractiveness. Reamaze is still in this testing phase.
- Once you've settled on a strategy, display your phone number prominently to better gauge its scalability early on.
- Once you're fully invested in offering phone support, make sure someone is able to personally pick up. Use this to your advantage. No machines, no automatic routing. This helps keep you true to your customer support bandwidth.
- Clearly state your hours of availability.
- Have a way to log phone calls with customers as conversations in your system. Sending a follow up

to the customer with a recap of the conversation is a great way to do this.

- Be transparent to customers about how you're handling phone support.

Is support a 24/7 business?

In a survey conducted by the Customer Contact Council in 2012, 965 B2B customers and 879 B2C customers perceived more value in access to customer support seven days a week than access to customer support 24 hours a day but for only five days a week.

Customers seemed to prefer having more flexibility in the number of days they can contact you rather than the sheer amount of hours.

“So the answer seems simple enough (provide certain service hours, 7 days a week), but what about providing 24/7 service and support for urgent issues, or what about using 24/7 as a business differentiator? Interestingly enough, in conversations specifically with B2B order management and technical support organizations, whose businesses often hinge on immediate availability of support, the general trend is not necessarily to provide 24/7 support. In fact, most B2B

organizations take a very discriminate view toward expanding hours of operation. And they consider self-service information and tools available on the Web and in the knowledge base as a key part of these strategies, meaning that 24/7 support doesn't necessarily have to mean 24/7 LIVE support.”

Corporate Executive Board (CEB)

Whether or not you decide to adopt 24/7 support ultimately depends on your type of business, your teams' bandwidth, and your overall resources. Here are some things to look out for:

- Evaluate fit (does it work for you?) and finish (can you do it well?).
- Don't over extend your team. Never just assume that your customers would love 24/7 support.
- Pilot everything. Run A/B tests if you have to.
- Be transparent about your policies for 24/7 support. Does it apply to just email? Phone?
- Suggest alternative ways to find answers and information.

“When I joined the client services team in early 2010, there were only 5 of us and the

hours of phone and email service were from 6am – 6pm M-F. Over time, we expanded to support weekends, and at the end of December 2011, we went 24/7 by adding evening shifts as well as a London team. It's been so exciting to see the growth, and it feels great to be there for customers any time of day.”

Courtney @ Eventbrite

Service Level Agreements

To be perfectly honest, for a startup, we recommend honesty and transparency over professional SLAs. It's likely that customers are okay with running along with you. As you grow in size, investing in a plausible set of customer support SLAs can be used as a major differentiator and marketing centerpiece for quality and reassurances. There are usually two schools of thought regarding SLAs:

1. SLAs are mostly hollow promises; you can have one, but at the end of the day, all that matters is how you treat customers, how honest you are, how helpful you are, and how willing you are to go the extra yard. In worst case scenarios neither you nor your customers will be pointing to SLAs but working toward to fixing the problem.

2. SLAs are integral parts of your product offering. Not only are you required to have one in certain cases but they can actively protect your quality and professionalism. Great SLAs can substantially set you apart from competitors and become a revenue generator.

Providing SLAs is ultimately a good growing pain. And just like growing up, approaches can vary widely. When you're ready to provide SLAs, be sure you can contain and project relevant performance indicators, failure rate expectations and ranges, response times, support terms and conditions, penalties, etc to customers. It's also important to factor SLAs into your prices.

Measuring performance

Analyzing the performance of your customer support team is only as important as their ability to keep customers happy and to focus on maintaining a customer-focused culture. And while it is sometimes necessary to keep track of individual staff performance, we find it counterproductive in most cases to make this type of analytics the centerpiece of measuring effectiveness.

In bigger companies, there's a temptation of creating urgency, and punishing poor performance. Internally, this is bad for morale. Externally, it's bad for the image of your company. Instead, encourage your team to function as a team where the ultimate goal is to create awesome and

lingering experiences for customers. Focus your metrics not on individuals but overarching themes for what defines great support.

For example, focus on getting back to customers faster as a whole, achieving a certain amount of satisfactory feedback as a team, and resolving a certain amount of volume in any given week. These fun and meaningful milestones not only take away pressure on individuals (where everything can become a chore) but also encourage cohesiveness among teammates.

"I care about our response time metrics and whether we're keep it up to our internal/external SLAs. Our customer satisfaction scores and tracking everything against that is important as well. Everything else is support information. But those two are the most important. Redundancy, scalability, and hiring are all core to our business. We focus on sharing knowledge and sharing volume as a big part of scalability."

Jason @ Twilio

It's very likely that these strategies may require more attention and modification as your business grows. If so, don't be afraid to measure more.

Knowing and understanding more about how your team is performing can add tremendous value in the long run.

However, strive to not lose focus on the why you're measuring or analyzing.

The toxic customer

You don't have to spend a lot of time slaving over a hot stack of support emails before you come across them: Toxic customers. You know, the ones with proactive rudeness, sudden and out-of-the-blue requests, impossible expectations, and an unlimited arsenal of irrelevant questions. It's inevitable. And strangely enough, having toxic customers can be a great blessing in disguise. But let's get one thing out of the way: nobody enjoys supporting toxic customers.

We're here to tell you that you should (at least once in a while). Toxic customers are the epitome of stress-testing your quality of service. How will your team keep its composure? How will you deal with absurd requests? How will you say NO to them? What else can you expect them to ask for?

We've compiled several strategies over the past few months about how to deal with toxic customers:

1. **Be more toxic than they are.** This doesn't sound as bad as it does. Being more toxic than a toxic customer is about extending the quality of your support beyond its normal boundaries. Be more attached than they are, ask more questions than

they do, and pay more attention to them than they to you. Fight “poison” with “poison”. Toxic customers have a threshold and your only path to liberation is to find that threshold and break through it with an overwhelming amount of love.

2. **Tackle toxic customers by gamifying the process.** As soon as a toxic customer is detected, huddle up a taskforce and enjoy an interesting meeting about a possible angle of approach. Take on toxic customers as a team and enjoy the learning process.
3. **Maintain your composure** and be sure not to piss off a toxic customer. Toxic customers are very outspoken, hence the toxicity. They're not afraid to voice their opinions. Treat them with the utmost respect and courtesy.
4. **Get them off your back early.** If you've decided not to deal with a potentially toxic customer, it's always better to let them know as early as possible. Be firm but courteous.

Also, do keep in mind that what makes a toxic customer toxic is also what might makes them a powerful ally: Their outspoken qualities are undoubtedly hard to deal with when you are the subject of their ire. However, if you are able to turn them around, they can be your most enthusiastic fans.

You don't have to dig deep to find stories of customer support wins, where a particularly difficult customer has been turned around to one of your most vocal advocates. Take their passion and turn it to your favor – you never know how influential they are, and if they happen to be a maven in their social circle, impressing them with great customer service may very well prove to be an extremely worthwhile investment.

Added Value

Natural retention

The loyal advocates

Build your brand with great support

You are the glue

An opportunity for improvement

Natural retention

One of the bigger themes of this book is to show you why customer support can be a positive revenue generator for any business.

Our personal experiences have taught us to value customer interactions and conversations as much as possible because it's not something that can be easily measured and quantified. And because it's not easily measured, nor often proactively measured, customer support can be overlooked as a traction point and entry point for new sales, customer retention, building additional lifetime value, attracting feedback, and increasing customer satisfaction.

"So much of the value in customer support can be seen in retention. We have the chance to make a strong connection with every client we talk to. We're actively listening to their feedback and making personalized recommendations based on their needs. By prioritizing the quality of these conversations, we're investing in the value of each interaction. If customers don't feel the respect of their voice being heard, then they will look for alternatives.

Collecting and closely tracking trends in the feedback customers provide offers us powerful leverage for inserting these ideas into the product roadmap. In short, having really great conversations is fun, optimizes

our product, and can be a powerful enough driver to ensure a customer stays with you. Plus, people love to talk about experiences that are unexpectedly positive. Making a strong impression with the support we provide gives Eventbrite really viral traction via social media and word of mouth."

Courtney @ Eventbrite

"I know for a fact that customers who talk to our support team are more likely to return. If you give them a good experience they you're capitalizing on your acquisition costs because you're increasing retention. This isn't a hard thing to find, you can measure this."

Jason @ Ideeli

The loyal advocates

Great customer support isn't only about answering questions or resolving technical issues. Great customer support gets customers excited about using your product/service, talking about your product/service, and most importantly, recommending your product/service to others. We've even had customers come to our defense when others talk poorly about some aspects of our product.

The psychological need to defend something you love is natural and it's your job to foster this mentality in your customers by becoming an integral part of not just their business but also of their lives.

"We have a really loyal fan base that shops with us frequently and continually raves about how simple we make things for them. Understanding the kind of customers you have plays a huge role in figuring out how to communicate with them effectively."

Lauren @ Twice

"Everything we've worked on here contributes to revenue; support is certainly no exception. If we don't support our product well, it's not going to succeed. At the same time, we use the feedback we receive from our support channel as a means to improve and drive Stripe forward. Many of our changes have come directly from our users telling us what they'd like to see, and it'd be a shame to not listen and let everyone take part in building Stripe."

Michael @ Stripe

When they're excited about being associated you're your brand, they make it a priority to share their excitement publicly.

Customers who advocate for you are also more likely to be forgiving toward your mistakes and shortcomings, thereby making up-selling, retention, and re-engagement far more plausible and achievable. Getting customers to advocate for you can be achieved if you do it systematically:

1. **Ask for their opinions**, feedback, and input on a regular basis through customer support.
2. **Ask if the solution and resolution you provided was sufficient.** If not, ask them how they would handle it if a similar concern comes up in the future. Give them credit.
3. **Reward customers** for sharing their thoughts and feedback. Changing the way to act and respond to you will change how they feel about you. It becomes self-reinforcing.
4. **Ask for testimonials on great support.** Make them feel extra special if they're willing to give one. Once they do, they're far more likely to become advocates.

Build your brand with great support

Customer support is a brand in itself. Having an outstanding product or service means nothing without the support that comes along with it. And just like any product

differentiator, customer support is a differentiator that can sway customers one way or the other.

Leveraging customer support as a main staple to your brand and business image means starting small and letting the details of your day-to-day operations permeate throughout your company.

The speed in which you reply to customers, the sincerity you express through your conversations, the care you show when resolving customer concerns, and the accessibility and flexibility to provide to customers all add up an inevitable transformation of customer support into marketing.

Whether customers publicly complain about you or share praise about you to their friends, these sound bites become opportunities for you to either change an opinion or build upon an already great relationship. These are tangible items you can act and accrue real rewards on. Now when customers hear your name, it's always associated to great people, great support, and most importantly, great culture.

Having customer support as the gateway to humanizing your business is probably one of the best ways to relate to customers and drive passion to your staff. Treat your brand as a summation of behaviors and attitudes. When you can systematically change behavior and attitudes by demonstrating your company values and culture, customers will flock to you without you having to spend a single advertising penny.

You are the glue

Take pride in being the cultural hub and glue of the company. Now that every staff member has had a taste for customer support and its value, everyone is essentially a teammate.

Keep the chemistry alive by actively partaking in culture-building within the company. Reinforce the “customers first” mentality and bring cohesion to everyone’s workflow.

"Since everyone came from support, they become best friends with people from other teams. No matter which team they go back to, that connection and bond is always present. Every team benefits from that. Support is close to everyone’s hearts for that reason at Outright."

Christie @ Outright

1. **Collect and filter customer comments**, feedback, concerns, and ideas and compile a small internal newsletter for everyone to consume. This is a great way to have customer support stay top of mind within a company.
2. **Join other teams’ meetings** regularly and learn about what they’re planning and building. If you have an idea, don’t be afraid to voice it.

3. **Invite other teams** to join your meetings and learn about new ways you're dealing with customers.
4. **Be actively involved** in company get-togethers and events. Everyone should be comfortable with the customer support team because it's a unifying identity regardless of role and department.
5. **Invite loyal, fun, interesting, and important customers** to visit and chat. Invite others to join in for a cup of coffee. This will do wonders for the identity and culture of a company.
6. **Request to QA** new features or services as a way to learn more about how to help potential customers. This is a perfect way to get involved in development cycles.

An opportunity for improvement

Having meaningful conversations with customers is the single most effective way to improve your product or service. This should definitely sound intuitive by now because every success is based on how customers relate to you.

If you don't want to hear what customers have to say, someone else will. A competitor will gladly offer their attention to take a customer away from you.

"Customer support is part of the user's experience with Stripe, and therefore is a core part of the product, not something subservient to it. We believe that everyone working on support should be able to change what Stripe is; that might involve changing our documentation, figuring out the best way to proactively work with our users, or making a change right to our core products."

Michael @ Stripe

Listening to customers and interacting with them not only gives you an opportunity to tell the world that you care about your customers but it also gives you data points and information for what you're doing right and what you're doing wrong. This is an opportunity to learn about what your customers need and want or whether or not you're even going in the right direction. Why would you want to pass this up to a potential competitor?

Building The Dream Team

It's all about momentum

What are you looking for?

The T individual

Happy people, happy customers

Keep the crew happy

It's OK to be picky

It's all about momentum

Superstar customer support teams don't need 20 people right off the bat. Think of it as a car picking up speed from a red light. The heavier it is at zero, the harder it will be to get going. Instead, take the weight away, let it accelerate, and slowly add more to the car as it's accelerating, adding more positive momentum.

Letting your ego or fear get to you while building a customer support team can be a very bad idea. The cold hard truth is that you won't have as much volume as you expect and you won't need as many people as you think. Instead, pay close attention to the few right people, right personalities, and right ideas that will foster healthy cultures, communications, and processes later down the road. Hiring too fast too soon can result in mismanagement, misaligned expectations from a variety of people and personalities, communication problems, training deficiencies, loose team cohesiveness, and much worse.

Get used to doing more with less. Your customer support team can easily manage the first year or so with just a few people. Look for alternative and creative solutions to offset spikes or unexpected events. Can technology help?

What about changing the process? If all else fails, it's perfectly okay to hire. However, remember that firing someone is much harder than hiring someone. Know exactly who you're looking for, what qualities are the right

fit, the scope of their role, and the cost vs. benefit for bringing them on board.

What are you looking for?

Hire for consistency. Hire for happiness. Hire for creativeness. Hire for intelligence. There are plenty of brilliant and hireable people out there. However, not all brilliant people are the right fit for your organization.

With a small team like ours, it doesn't make sense to hire people with overly specific experiences, goals, and skills. Instead, we choose to focus on picking out people who are genuinely happy, who like to ask questions, who wants to spend time chatting it up with customers, and who are intelligent enough to think of a way to work with our values and culture.

"When hiring, there are personality traits that you can't teach. Focus on those things that need to be pre-programmed. Hire the personalities, not the skills."

Christie @ Outright

"We don't wait until someone joins our team to start espousing philosophies. We start at the interview stages to begin talking about what our CS philosophy is and what we look for.

Starting with the interview, we're really talking about the experience, the different types of customers we have, talking about key elements such as accountability and ownership to make sure that anyone that joins us has the drive and internal interest and seeing the bigger picture. Curiosity is a key trait we look for to make sure they can venture out by themselves."

Courtney @ Eventbrite

Spend and invest in hiring the right people. The right hires promote consistency as an organization. Rock star teammates are able to affect the mood and effectiveness of your entire team.

It's your responsibility to not only find rock stars but make sure their qualities permeate throughout the entire team so that their knowledge, passion, and drive are consistently projected both internally and externally.

"Put yourself in their shoes! I try to picture how I'd feel in their situation (especially given the traumatic experiences most people have had with customer service elsewhere) and make it as pain-free as possible.

While many would groan and roll their eyes when given a not-so-technically-inclined customer, I love the challenge of teaching

them and they're always so thankful that I helped them through their crisis without making them feel stupid.”

Lauren @ Twice

The T individual

You want to hire customer support agents who can wear multiple hats. Customer support is a skill set that encompasses a wide variety of knowledge and talent regardless of company size and scope. If you're a growing company, it doesn't make sense to hire something like a customer service analyst.

You might need a customer support agent who is also genius with copy. You might need a customer support agent who is also a great videographer. You might need a customer support agent who is also great at QA. At the same time, these customer support agents are wonderful with people. These T individual can be proficient at many different things but can also always focus on excelling at the primary task.

“Our backgrounds are pretty varied, so we're each bringing something new to the table. An important quality throughout all of Stripe is that we're independent and able to individually impact both what support and all of Stripe look like. ”

Michael @ Stripe

You, and the people you choose to hire, must also understand the probable need to pivot later down the road. T individuals are more comfortable switching gears and focusing on something else they can become proficient at. Be wary of those who are resistant to change and flow but are brilliant at just that one thing.

“I look for a blend of talent, skills that complement each other. I treat support as a training ground for the rest of the company and bring people that have bright futures ahead of them but might not necessarily have a wealth of expertise, and it gives us an opportunity to indoctrinate them into how we want to approach customers and how we want to build a company.”

Jason @ Twilio

Happy people, happy customers

Look for people who can't fake enthusiasm even if their life depended on it. People who are genuinely empathetic, friendly, and genuine are a scarce resource.

“When evaluating candidates for a position on our client services team, we're looking for people who are friendly, genuine,

empathetic, and naturally resonate with our support philosophy. We've created a culture in which problem solving and curiosity is key, since learning is ongoing.

This is a place for people who thrive off of ownership and accountability, so we look for candidates who have an innate interest in creating a world-class customer experience.

My advice is to spend money on hiring people who will personally thrive and professionally drive your organization forward if given the chance. Hold out for the rock stars – it's worth the investment. Their happiness transfers directly to your customers.”

Courtney @ Eventbrite

Enthusiasm feeds enthusiasm. To your advantage, enthusiasm also has no prerequisite. Enthusiastic people don't need to have an extensive background or a pre-developed arsenal of skills to be enthusiastic about something. Value those who are excited about building what you're building, love what you love, and can't wait to get their feet wet. These are the people you can trust to make customers happy and excited about your business.

“Everything starts during the hiring process in order to find people that are

motivated about support. As a startup, we're not looking for people with a call center mentality. When you hire those types of people, that's the type of support they will deliver.

We try to find people that are empathetic and have the intuition to look beyond what the customer is saying and get to the root of what the customer actually wants. ”

Jason @ Ideeli

Keep the crew happy

Let's admit it; customer support can be terribly dreadful at times. You want to keep those enthusiastic and forever happy teammates happy in the long run right?

To stay happy, your team needs to work in an environment that fosters happiness and use tools that are designed with maximizing happiness and simplicity in mind. Look beyond what everyone else is using simply because it might be the best option. It's likely that thousands of companies out there find it dreadful.

Just because a certain tool can handle “tickets” doesn't mean you should use it. Heck, even a simple email client can handle “tickets”. The difference between a capable

tool and the right tool can make all the difference between frustrating and inefficient, and fresh, fun, and intuitive.

Happy customer support agents treat customers respectfully, respond faster, have more mindshare to be creative and innovative, have more fun, and generally make those who interact with them happier as well.

Give you support staff some freedom in choosing what they enjoy working with. Have them pick the tools that make their workflow more exciting and less dreadful. Happiness can be viral when your staff has a vested interest in working with something every day.

"I think the two biggest issues are that most customer support tools don't integrate with existing workflow tools well enough and they get in the way of a personalized experience with the customer.

Some of this just can't be avoided when you get to scale. But putting my startup hat on, the ideal tool when we were starting out would be almost completely transparent to the customer but would provide good admin and monitoring tools for us, the vendor. Something that would allow me to just use my email or chat-client of choice and it would be a background process keeping track of everything."

Taylor @ Rackspace

It's OK to be picky

Be absolutely picky about those you choose to hire. Don't muddy the lines between enthusiasm and happiness with impeccable on-the-ground execution. For example, we refuse to hire individuals with poor writing skills. We're not talking about the occasional typo or grammar slip-up.

Everyone makes mistakes. However, individuals with poor writing, reading comprehension, and tone control skills have limited capacities to express themselves, or worse, to understand customers. Poor writing skills can also severely hurt a company's credibility.

There are no excuses for poor writing:

- It shows an absolute disregard for professionalism and care. If you don't care about these details, why should customers care about you?
- A single poorly written email can represent an uneducated and oblivious group of people.
- Poor writing shows laziness and a lack of motivation. Responding fast does not mean pushing out as many emails as possible without proofreading or double-checking.
- Poor writing takes away trust. Would you trust a company with your sensitive information if they can't even write a sentence without sounding elementary?

It doesn't have to be writing for you but be picky about the things you look for and value.

"For us, it's about finding people who care. We look for people who like dealing with people and it pains them to tell customers "No" so they will look for creative solutions. If you find the right traits, you don't need to instill that sense of responsibility because they already have it. We look for backgrounds such as teachers. Attitude is most important. Everything else you can teach."

Jason @ Twilio

Closing Words

Words for Wisdom

Words of wisdom

We asked everyone to provide a few hard-earned nuggets of parting advice. Here's what they had to say:

Lauren Heminez @ Twice

"Add your personality to create deeper connections so customers know that you have their best interest in mind."

"Communicate more so everyone knows what issues are coming up in customer service and how their job function can help prevent future problems."

Courtney Duhring @ Eventbrite

"Our success originates from the people we identify for certain roles. Fine tune and understand the skills you need for someone to be successful on your team."

"Think of customer support as crafting better experiences rather than thinking about it as damage control. Don't think of customer support as a team that listens but a team that accompanies, helps, and advises."

Jason Faria @ Ideeli

"Always think about scale for customer support. When implementing any new process, if you can't repeat it at least ten times over, then it's not the right process to implement."

"Make sure you get it right in the beginning!"

Jason Nassi @ Twilio

"Absolutely invest in support! Make sure that the company is in touch with customers. The best way to do that is to have a tightly knit support team where founders and developers are doing support."

"As you're building your team, think about how the teams will interact with each other. You have to think about how the pieces will fit together and not fixate on the best resumes."

Michael Schade @ Stripe

"Quality over speed!"

"Make sure your support team has the technical tools and expertise they need to diagnose novel problems."

Taylor Wakefield @ Mailgun

"Make it a priority early, it will pay off in customer retention and 'free' word of mouth marketing (the best kind of marketing)."

"Make it a personal experience for your customers and treat your customers like partners - their success will fuel yours."

Oodle

"The importance of speed can't be overstated when it comes to support. Letting a customer know that you've received their correspondence and that you're working on it sets the tone for the entire interaction. Autoresponders aren't good enough here, a personal response is needed."

"If you're ever in a frustrating situation where it feels like there's just no pleasing the person you're dealing with, put yourself in their shoes. That customer is taking the time and the energy to voice their concerns to you."