

CUSTOMER SERVICE at SCALE



HOW TO ACHIEVE **HIGHER CUSTOMER SATISFACTION SCORES AND REDUCE CHURN** BY DEVELOPING HIGHLY EFFICIENT SUPPORT AGENTS IN THE **NEXT 12 WEEKS**

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Why we wrote this book

Improving lives and making technology easier by providing professional support to software users

This book was written in an effort to fill a gap that we recognized while servicing our clients as business growth consultants. As part of our consults, we would provide small business owners with the software tools to help their businesses grow. However, we discovered that the software which was originally purchased with the aim of making their lives easier didn't always function as originally envisioned.

We purchased multiple software tools but they didn't always work as described and did not provide support when we really needed it - which is normally during the weekends or holidays for busy business owners. After spending hours trying to figure out the problems ourselves we would inevitably cancel the software due to frustration. We found there are a large number of companies developing numerous software tools but they don't seem to be improving the ease of use, whereby users could realize the full value. We found ourselves in the situation of supporting multiple clients on multiple applications, realizing that there is a large gap between software and the service provided.

After working with these companies, we noticed certain patterns and gaps. We began offering support ourselves. After working with hundreds of clients we came up with a step-by-step method to significantly improve the customer experience and, in turn, increase the lifetime value by driving down churn in a short amount of time. This also increased the bottom line of the company. We discovered some very defined methods of offering high-quality service which software companies are not implementing.

Our mission is to ensure that all users of software receive the best service in order to maximize their investment in the technology. After working with some large best-in-class SaaS companies, we realized that this methodology was not easily available to mid-size and growing companies. Technologies and tools for developing the

Why we wrote this book

software are readily available but there is a dearth of documented processes to achieve high customer service levels.

In this book, we aim to show a simple, defined method to achieve higher customer satisfaction scores and reduce churn by developing highly efficient support agents within 12 weeks.

Software companies are now serving a global clientele who need high-quality support 24/7 in order to use their products more effectively and efficiently.

To help software companies ramp up quickly we also formed our own Support Company, Equinox Live Agents to help our customers support their clients across all continents. The need for high-quality technical support has grown so much that we have expanded our Support Team exponentially over the past 12 months using all the processes outlined in this book.



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Chapter 1:

Is Your Support Polishing or Tarnishing Your Reputation?

Your clients purchase your software because they have heard about your reputation, know about your culture, and are excited to sign up. However, they experience your software through your front-line agents who sell them the product and support them through their journey.

It can typically take a few weeks to a couple of months before your clients realize the full benefits of the software. Throughout this period, clients interact with your support staff to reach that goal and if they do not have a satisfactory experience through this learning curve they may be inclined to switch to a competitor. And as the company grows, your founder's vision can be lost or diluted. Why? Because new clients do not tend to interact with the founder and the expanding team is not able to deliver on that vision. After spending a great deal of time in building their software, team, and reputation, it is a shame to see a new client leave due to one poor experience with a support agent. You may have also invested substantially in the training of your support agents but inconsistent experiences easily frustrate new and tenured clients and they begin to lose trust in your ability to provide value.

The challenges that leaders face when building a support team is to ensure that every agent is on the same page as the founder, or in line with the company's vision and purpose. However, when done correctly, the Support Team and indeed the entire company are living and breathing the same values. This results in an overall positive customer experience through their journey with you.

So how would you overcome this problem? As Richard Branson said: "Take care of your employees and they will take care of your customers"

Here is a 5-step process to achieve this outcome:

1. Express the importance to potential applicants of aligning with your core values.
2. Set up your hiring gauntlet (tests) to measure their alignment to your core values to filter out individuals who don't align.
3. Ensure that your induction program covers the purpose and core values on day one.
4. During daily huddles, ensure that your team leaders talk about core values and recognize agents who are living up to them.
5. Use core values in your daily communication with your team and make sure your team leaders repeat the words found in the purpose and core values in all their communication – verbal and written text.

If you follow these five steps your support agents should be completely aligned with the vision of the company, displaying the care needed to maintain your reputation.

Within our own support team, we ensure that we continuously expose our agents to our vision from the moment we first interview them through to daily practice.



If you follow these five steps your support agents should be completely aligned with the vision of the company

A Polished Reputation Created Positive Reviews

One of our clients, a SaaS company with a support staff of 100, faced a challenge of high wait times and inconsistent support experiences by their clients. This resulted in multiple negative posts on social media about their poor support experiences. Because of the negative publicity existing clients would cancel and prospects would not even try them out.

The company approached Equinox Live Agents to explore expanding coverage and to plug the gaps they had. After an initial assessment, Equinox realized that the company's agents had excellent technical skills but were not providing care during their customer interactions - they had the skill but not the will. This was a clear misalignment with their core values.

To overcome this problem, Equinox familiarized themselves with the customer's core values and made them our own. We then set up the gauntlets to measure the alignment of each new hire against these core values during our hiring process. The onboarded agents went through the steps outlined above and we immediately found that even though we were bringing our agents' skills up to par with the internal team, they went above and beyond the "will" factor within weeks of getting started.

We measured these elements against detailed quality parameters for every interaction with live clients and found that these new agents consistently delivered high-quality support reducing the negative comments and building back the trust with their existing clients.

Chapter 2:

Five Customer Experience (CX) Metrics That Nobody Tracks

Most support teams track metrics that they learn in Contact Centre Management 101. These include CSAT (customer satisfaction), ASA (average speed of answer), AHT (average handle time), Abandonment Rate and some form of an Internal Quality Score. These are great indicators of CX but may not tell you the whole story.

While these metrics are helpful to measure the performance, they are lagging indicators of performance and thus limit the ability for teams to make changes based on their values. It can be compared to driving a car by looking in the rear mirror. While this information is important, it does not tell you what is coming ahead of you and how you can make better decisions going forward.

After working with many clients, we found that teams need more insight into how they can influence the performance of their agents based on leading indicators. To provide improved customer sentiment and experience you need to know how to improve the experience NOW and what decisions need to be made to ensure agents continue to improve.

Here are the five additional CX Metrics that can help your team to better serve your customers and provide a beneficial experience:

- 1. Contact Rate:** This is the number of times a customer reaches out to Support per month. You will need to create buckets for 1, 2, 3, 4, 5+ contacts per month. This can be further drilled down to Channel (Chat, Phone, Social, etc) and by Problem Category. This will help you create a plan of action to lower these numbers. This will also assist you in providing your Dev Team with Product and User Experience (UX) enhancements.
- 2. Health Score:** This is a single measure of your customer's usage of your product. This can be calculated using multiple parameters such as logins, number of contacts, users, campaigns, rate of adding contacts to the system and other

usage indicators. This can help you quickly segment your users into categories so you can proactively reach out the correct audience with the right message to turn them into staunch supporters.

- 3. First Contact Resolution:** This metric tracks what percentage of support requests are closed at first contact. The higher the number, the better the CX. If a customer must reach out for support more than once for the same issue, the level of frustration goes up and trust goes down. This can quickly impact your reputation.
- 4. Internal TouchPoints:** This measures how many different people the customer will have to interact with to resolve a single issue. In "best in class" companies, the number is one.
- 5. Social Reputation:** This the measure of positive mentions minus negative mentions about the company's support across all social platforms.

Pro-Tip:

Respond to negative comments as quickly as possible and resolve them at a higher priority.

How to Implement Health Score

One of our SaaS clients was seeing a measurable improvement in their CSAT Score but continued to experience poor social reputation.

The company simply focused on the internal quality measure but this was not having a significant impact. Equinox Live Agents introduced the idea of using leading indicators to identify future potential issues before they transpired. The idea was to segment their users into categories, based on usage and proactively reach out to customers who fell into one of the following four categories:

1. **Role Model:** These were customers who had high usage scores and were generating significant results using the software
2. **Potential Star:** These were customers who had low usage scores but were still generating great results
3. **Laggards:** These were customers who had high usage scores but minimal results
4. **On The Ledge:** These were customers with low usage and low results.

Equinox Live Agents recommended an action plan for each category and implemented the outreach program. We reached out to clients in each category and engaged with them to move them up the levels. For example, we worked with the Potential Stars and provided simple strategies to move them up to the Role Model status and as a result achieving even better results for the clients by simply increasing their usage. For the On the Ledge and Laggards group, we also reached out to individual clients to provide strategies to achieve better results with a goal to get them to Role Model status. Once fully executed, the number of negative posts in social media dropped drastically and we were able to generate a positive buzz.

Chapter 3: Creating, Growing and Maintaining Your Dream Team

Support agents are generally seen as entry-level positions in a SaaS company. They have a high learning curve, have to deal with the majority of problems in real-time, and are still required to wear a smile.

It sometimes feels like a thankless job. How do you hire and retain agents who are eager to perform at high levels on a consistent basis? These agents are willing to start their careers in this position but are generally keen to move up the chain as quickly as possible. Continuously filling the agent positions, due to either churn or promotions, can result in a strain on the company's resources for both HR and Training. It is almost like you're continuously looking for people in this position even after you think you have filled them. And at the same time, you are trying to build a dream team that actually gels together and aligns with the company's vision.

At Equinox we were able to generate a consistent team of high-performance agents and team leads by following this process:

1. We use the **5-step vision-setting process** (described in Chapter 1)
2. We use our **4C performance model** to turn our agents into "rock stars":
Create > Calibrate > Coach > Commit (described in Chapter 4)
3. We use a **cadence of sync meetings** internally and externally
4. We use a weekly **rewards and recognition program** to keep the team motivated
5. We use **daily huddles** to reinforce the importance their role plays in contributing to the mission of the company

We have been able to use this process on a consistent basis to attract and retain high-performing agents that work together as a dream team for our clients.

Chapter 4: Getting Ordinary Agents to Deliver Extraordinary Results Every Time

Delivering consistently high-quality customer service can be a challenge - especially as the team grows and the volume of interactions increases. There are more chances of having a one-off poor interaction that can lead to significant unwarranted negative publicity. Even though we know that over 95% of our interactions were successful, it is that 5% that can quickly escalate.

What is even more frustrating to customers is an inconsistent quality of service delivered by agents. They start asking for specific agents and try to avoid others. Clients lose faith in the ability of the company to handle more growth and wonder if they should switch to another provider who has better customer service. With the increased availability of software alternatives, clients are now even less tolerant of poor customer service and unless you have a monopoly in the business they are not going to wait for months for the service to become more consistent.



What if there was a way where you would know that every agent's interaction with every client is going to be flawless, no matter how many agents you have or how tenured they are in your company? What, if instead of worrying about getting another dreaded email about a negative post on Facebook, your agents were constantly mentioned by others in the company and by clients about their stellar performance?

These were some of the stark turn-around results we were able to achieve once we realized the importance of having the quality team drive the 4-C process of Create > Calibrate > Coach > Commit. This process ensured that every agent knew exactly how to deliver high-quality results and was given the right coaching at the right time to make course corrections before it was too late.

A common misconception that companies have about the quality team is that they are seen as an afterthought who don't have much of an impact on the bottom line. After learning the hard way, we found that the quality team takes over after the initial training is completed - and without them, we are setting up our agents to fail. In addition, the individuals who are part of quality assurance are thought of as those who simply monitor interactions and provide feedback - while, they are responsible to set up a process so that every interaction is perfect.



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The 4C Process at Work

One of our clients had experienced rapid growth in a short amount of time and was adding new support agents very quickly.

While the onboarding process had been streamlined, their ongoing training and quality were neglected and as a result, they were suffering inconsistent customer support experiences. The quality team made up a very small percentage of their support staff – they only had one person handling the quality measures across all agents.

After implementing the 4-C process they were able to significantly improve their agents' performance and deliver a consistent experience for their clients with both new and tenured agents.

Here is the general framework for the 4-C process that we follow with every client:

- 1. Create:** the scoring mechanism to rate each experience. This is typically based on key behaviors such as control of the interaction, troubleshooting and utilizing resources. These key behaviors are then given a weight to calculate an overall interaction score. We then measure a sample size of interactions on a regular basis and track the improvement over time using heat maps for each agent.
- 2. Calibrate:** the scoring methods with the team leaders. We set up weekly calibration sessions with the quality team and team leaders to ensure that the leaders are fully calibrated with the way that each interaction is conducted – not just with each other but also with the way the company expects each interaction to be carried out. This provides the team leaders with the knowledge and skills to provide effective feedback to the agents.

3. **Coach:** each agent on how to deliver consistently high-quality customer service using the key behaviors outlined in Step 1. This coaching is critical to the process and serves as the key to unlock the full potential of the agent. This is the secret ingredient that allows ordinary agents to be extraordinary. Each agent is assessed by the team leader on their Knowledge, Will, and Skill level - i.e. do they fully understand what it takes to be extraordinary based on the key behaviors (knowledge)? Have they been taught the skills to be extraordinary? And do they have the desire to be extraordinary? If any of these areas are found to be lacking then the team leader needs to obtain the agent's commitment to improve.
4. **Commit:** to improve. Based on the feedback from their team leader, each agent gives a weekly commitment to improve the area that they need to work on and document the commitment in the form of a SMART goal - Specific, Measurable, Achievable, Realistic, and Time-bound (typically 1 week). These goals are then tracked and reviewed every week by the team leads as part of step 1 above and the entire 4-C process repeats each week.

Initially, the above 4-C process seemed daunting and appeared to be highly time-consuming by the client but when we built this into our staffing models we realized that it only took about 5% more time across the entire schedule to accommodate it. The return on investment paid off in multiples in a very short period of time (within weeks). We saw drastic improvements in quality and consistency once all team leaders were calibrated and provided the feedback in a highly focused way every week.

Chapter 5: Making Performance Visible

So far, we have talked about creating consistent experiences for clients by ordinary agents who deliver extraordinary results – and doing this by aligning the agents to the company's core values and driving quality through streamlined processes.

However, all these processes and systems begin to generate a large amount of data and we can become overwhelmed by the amount of information that each agent, team leader, manager, and ultimately the company must gather and monitor. As a manager, you can quickly become paralyzed by the number of steps and tasks you have to complete while observing all the data that is thrown your way.

Additionally, we may not even know if we are measuring the right metrics. As discussed in Chapter 2 is it adequate to just measure the customer satisfaction and speed of answer or should we be monitoring other indicators?

So how do you set up a system that provides the right information, the right amount of information and to the right person on the team? To answer that we need to understand what each individual in the company should monitor on a daily, weekly, monthly, and quarterly basis and how they should access it.

In this chapter, we aim to provide you with a definitive and comprehensive list of the metrics to track for chat support. These are the basic metrics that most companies track but we are providing this list just in case you may have omitted some of them. By implementing these metrics within your organization, you and your team will be able to build a solid foundation for improving the success of your customer service department.

These are the metrics you need to keep track of as you develop your ability to deliver truly world-class SaaS support for your customers and clients. Establishing these metrics early on will not only help you set up stronger customer service processes but will also help your team adjust and improve quickly.

In the following section, you will find a comprehensive list of the metrics specifically dealing with chat support as a case study. These metrics can be applied equally to phone support. The metrics are divided into key groups based on organization level, which will enable your business to track data by agent, team, management, client and overall business.

The objective is to give you the tools you need to acquire the necessary information and to help you implement robust, data-driven service protocols within your organization. At the end of some sections, we have also provided some example dashboards that you can set up on each level to bring the information to life and make it easier for the observer to consume the data quickly.

The Metrics

Agent Level

Here are metrics that are viewed by each agent. This only includes data that the agent is responsible for and that he or she has some control over.

- **Chats Completed:** Number of chats taken by agent during that shift and month-to-date
- **Customer Satisfaction Score:** Score provided by clients based on survey sent after the chat
- **Internal QA Score:** Score given by internal quality staff for chats taken by agent
- **Handle Time:** Average time spent on each chat
- **Open Tickets:** Number of open tickets initiated by agent
- **Ticket Open Time:** Average number of days the ticket has been opened by agent

Team Level

In most SaaS companies, we can assume that one team leader manages between seven to ten agents. These metrics are viewed by the team leader and include data that he or she is responsible for and exercises some control over.

- **Average Speed of Answer:** The average time a client must wait to chat with an agent
- **Chats per Hour:** Number of chats per hour, by agent
- **Handle Time for Team:** Average time spent on each chat, across all agents and by individual agent
- **Utilization:** Average Percentage of time the agents are online
- **Customer Satisfaction Scores:** Score provided by clients based on survey sent after the chat
- **Current Queue:** Number of clients currently waiting in queue
- **Highest Wait Time:** Longest time a client has to wait
- **Agents Available:** Number of agents online and available
- **Agents Away:** Number of agents online but away
- **New Tickets Created:** Number of new tickets created that day
- **Tickets Still to be Closed:** Number of open tickets
- **Average Response Time:** Average time it takes to respond to tickets
- **Average First Reply Time:** Percentage of questions that are answered on the first request by client
- **Chat Quality Score:** Score given by internal quality staff for chats taken by agent
- **Agent Usage by Status:** Percentage of time spent by each agent online, in meetings, coaching, and on breaks

Here is an example of how to bring the metrics above to life for your team leads:



Management Level

These are the metrics that are viewed on the management level (operations manager, director of customer success, VP of customer success, etc). This data is compiled and shared with management on a weekly or monthly basis as part of the regular management cadence. Some of this data would be combined with other metrics relevant to managing the entire support system.

- **Chats Presented:** The total volume of chats, by month, for the last six months
- **Average Speed of Answer:** The average speed of answer, by month, for the last six months
- **Customer Satisfaction Scores:** The average customer satisfaction score, by month, for the past six months
- **Handle Time for Team:** The average time spent on each chat across all agents for the past six months
- **\$/Chat:** The total expense (direct and overhead) for the chat department divided by the number of chats. Show this data for each month for the past 6 months. This is the only metric that matches financial data and performance data and is useful to track resource efficiency.

Below is an example of how to bring the metrics above to life for your managers:



Client Level

In addition to the basic metrics shown above, you may also be interested in obtaining customer-specific data to identify trends. Managers may be interested in reviewing the following on a weekly basis:

- Which clients have used the chat more than three times in a month?
- Which clients have submitted more than three low customer satisfaction scores (detractors) in the last 60 days?
- Which clients have given more than three high customer satisfaction scores (promoters) in the last 60 days?
- Which questions were asked most frequently this month?
- What were the top five reasons customers sought support?
- What are the trending topics for each month?
- Which clients are using chat support the most frequently?
- When has proactive support been offered (reaching out to clients, etc)?

Managers may want to personally follow up with some of these clients to thank them for using support and resolve any further issues they may have.



Business-Impact Level

Finally, your team will want to keep track of the leading indicators that have been described in Chapter 2 as a way of making better choices to adjust support resources. These have not been repeated here.

Building a data-driven culture takes time and commitment. When we apply a set of metrics to a particular problem, or to a particular customer interaction, we can expect a more thorough and effective resolution.

So, what comes next? It will depend on how many of these metrics are already being tracked in your organization, but it begins with developing a data-driven culture from the top down. Growth and scale in the SaaS industry can only come from such a culture. We recommend sharing this list with your in-house data team so that they can put together a blueprint of metrics that make sense for your individual business. The blueprint should consist of the metrics themselves, how they would be gathered from your existing systems, how often they would be gathered, and how they would be displayed to each level in the organization.

With this metrics infrastructure in place, world-class SaaS support delivery doesn't seem like such a lofty goal—it becomes your company's new reality.

Chapter 6:

How to Create a Support Team That Never Sleeps (Outsource)

As you bring on global customers your support coverage hours continue to expand causing a strain on the daytime support staff. To provide high-quality support to all customers you begin to stretch the hours that you agents work.

This can lead to high-stress levels, long working hours, lower quality, lower job satisfaction, and ultimately high churn rates in agents. One way to solve this is to hire more people but you then need to compensate them at a higher rate which can be cost prohibitive. This doesn't even take into consideration the additional infrastructure needed for these off-hour agents including nighttime hours, weekends and holidays.

Another approach is to find a partner that can provide the support with the quality you require.

Here are 10 signs that you are ready to find a partner to work with:

1. You have a **global customer base** but your support team is not able to handle overseas clients.
2. Your customers use your product 24x7 but your **support works only five days** a week.
3. You have **difficulty in finding agents** to work in Support.
4. Your **churn rate** for support agents is high.
5. Your **customers are complaining** about the lack of support when they need it.
6. You have been **asked to reduce the budget** for Support.
7. You are **unsure of how your support team is performing** and don't know how to improve it.
8. You have many **complaints** about your **support on social media**
9. Your **client base is growing** faster than your support team
10. Thinking of support **keeps you awake** at night.

If you face any of these issues it is time to find a partner and outsource some of your support.

However, you or individuals on your leadership team may have a few concerns about outsourcing. The biggest issue raised would be how can I find a reliable partner who can deliver the same or better quality of support, for all the time slots that I need, at a price that suits my budget?

Here are 10 factors to consider as you research the possible partners to work with:

1. Does the Contact Centre work **24/7 365 days** per year?
2. Do they have a **Workforce Manager** and an **Operations Manager**?
3. Do they have a **Trainer** and **Quality Managers**?
4. Do they have **uninterrupted power** and **Internet** and **backups** for both?
5. Do they have a **dedicated HR** team?
6. Do they have **sufficient capacity** to fit your process (current and future requirements)?
7. Do they have **defined processes** for hiring, onboarding, training and retaining talented members of staff?
8. Do they **track metrics** for all critical system parameters?
9. Do they have a defined **Customer Contact Management Plan**?
10. Do they follow the **guidelines provided in this book** to make ordinary agents extraordinary?

Once you have identified a potential partner, the best way to start is with a small pilot batch of three to eight people and test them for three months before scaling.

Chapter 7:

How to Get Started with Us

There are several processes and concepts that we have shared in this book to help you build a world-class customer success team. You could set these up on your own or partner with someone as discussed in the last chapter. We have set up a streamlined process to start working with clients who are ready to test a partnership model with us. We are able to set up and deliver results within a 3-month period using the following process:

1. Create and Launch the Pilot Batch

a. Week 1:

- i. Define Scope of Work: Obtain clarity on client expectations in terms of volume, coverage, quality
- ii. Setup Agreement: Have an agreement in place which captures the scope, terms and conditions and commercials
- iii. Finalize Agreement: Ensure that the agreement is signed
- iv. Setup Team Cadence: Fix a meeting schedule for the different people involved in the project

b. Weeks 2-6:

- i. Setup and Conduct Training (core values, product, quality): Create an onboarding plan, training plan, training Content
- ii. Onboarding: Start the recruitment process
- iii. Build Metrics and Dashboard: Create trackers for all metrics, create dashboards
- iv. Conduct Mock Calls/Chats: Once our trainer is trained we can have the first batch trained and be ready for the first mock calls.

c. Weeks 6-10:

- i. Go Live: Once the mock calls are acceptable, we can go live with the process
- ii. Evaluate Performance: We do a weekly performance review with the agents
- iii. Provide Feedback and Improvement: Customer provides a weekly feedback on performance

d. Weeks 10-12:

- i. Implement Improvements: Team leads will start training to improve and track the progress throughout the month
- ii. Evaluate Pilot Batch Results: Client evaluates the performance of the training batch
- iii. Plan for Scale: Client shares their thoughts on the batch and the plans to scale the process.

2. Scale the Operations (After week 12 based on performance)

If you are looking to setup and scale a world class support team within weeks you can team with us and use the process above to achieve your goals.

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Chapter 8: About Us



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Ashwin is a serial entrepreneur who runs seven different businesses and has helped 100+ companies refine their management and provide great customer support.



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