



## Moving from “Customer Support” to “Customer Success”

*By Becky Carroll, President and Founder Petra Consulting Group*

As the support industry makes the shift from break-fix service and support to providing value to customers beyond the product purchase price, there is a need to shift support organizations from “customer support” to “customer success”. This shift requires support organizations to focus on customer needs instead of products. Customers want to see that shift as well.

However, there seems to be a spectrum of functional capabilities when it comes to technical support services, both B2B and B2C. Those that often frustrate users the most are the support organizations that strictly answer the technical questions posed, often from a script, seemingly with little awareness of the actual problem. At the other end of the spectrum are those technical support departments that go beyond the customer’s expectations, ensuring a customer is fully satisfied before closing out a case. In this last example, the support experience is considered a critical part of a customer’s overall experience with the organization’s products and, ultimately, their brand.

### The Pathway to Change: Six Steps Toward the Goal

The journey to move from customer support to customer success may be arduous at times, but support organizations can take the right path if they are properly prepared for the trip. Some companies try to take shortcuts. They buy the latest and greatest CRM software and hope the implementation will bring about results. However, “random acts of CRM” by well-meaning support reps will not get them to the goal. These actions can damage the customer experience as well as the operations budget! Support organizations must create standardized, customer-focused processes and content in order to improve the support experience.

There are six main steps a support organization can take to “map the route” towards a consistent customer experience which will bring about customer success.

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## Step 1: Understand the Four Key Customer Expectations

In order to move support organizations toward customer success, it is important to understand customer needs from technical support. Although there is often a gap between customer expectations and reality, across industries most customers expect very similar things from their encounters with technical support. In fact, there are four common expectations that need to be understood in order to move towards customer success through great customer care.

### **But, I don't want to talk to you!**

First and foremost, customers expect not to have to seek technical support at all! Just the fact that the customer has to contact technical support can immediately start to erode the positive impressions of the product, and possibly the brand.

### **All right, I will talk to you if I have to...**

Second, when customers DO have to contact support, they expect to be helped quickly. However, too many customers can't easily get through to a person on the phone, or they find email help ineffective, or they get lost on support web sites.

### **And the answer is...**

Third, customers want their problems to be solved as quickly as possible. This does not necessarily mean having their immediate *questions* answered. Customers want to have their *issue* resolved or equipment repaired – ideally, at first contact. Again, anything less than this starts to fall short of expectations. If they can't have it resolved at first contact, they would like to be able to get in touch with the same support engineer if they have further information or questions. The answer, "If you need to call back, any one of the team can help you with your question," does not make many customers feel warm and fuzzy!

### **Treat me right!**

Fourth, whichever channel an organization's customers use to contact support, they expect to be treated well. No one wants to be made to repeat information multiple times, have a web form cleared and have to start over again unexpectedly, or be talked down to in an email response. The customer experience with technical support in any channel not only affects customer satisfaction, but it also impacts the likelihood of this person to purchase from that company again or to recommend it to a colleague.

Band-aids for customers who deal with organizations that don't understand customer expectations are now starting to appear. For

example, there is a web site to help consumers called GetHuman.com. The database on the site was developed by those who are tired of getting the IVR-shuffle. It gives the “magic combination” of telephone keypads to press in order to get through to a live person, listed by company. The fact that a site like this exists is an echo of the feelings of many support customers. In these instances, technical support is not yet “customer success”; rather, it is technically-trained people answering queries (assuming one can get through to a person when desired).

## **Step 2: Look at your company’s support experience**

Now that customer expectations of a support experience are understood, it is time to take a closer look at *your* organization’s experience. What is taking place at all of the points where a customer interacts with your support channels? What is your customer experiencing with your competitors? Are there opportunities for improvement in your experience? Where are the areas that customer information is not being passed along adequately to the next level of support? Do you know if your experience is broken?

Recently, I contacted a customer support organization via the toll-free number listed on their web site (as a customer experience expert, I am always checking out customer interactions!). After getting the obligatory, “Due to the high volume of calls...” message, I put the phone on speaker, started my stopwatch, and continued my work. 30 minutes of listening to “ads” passed. 50 minutes went by, with please to “try the website”. After 75 minutes had passed, I hung up the phone in disgust and ran off to a meeting. I called back later using a different number, this one not toll-free and buried on the support site. When it was answered immediately, I shared my experience so far with the support rep. He asked, “You didn’t call the toll-free number on the web site, did you? That number goes into an endless loop and is *never* answered!” I think my jaw hit the floor when I heard that. Not only did this organization have a broken phone number, but *they knew about it* – and let me know that they knew. I sure hope they are fixing this experience for the next caller.

Customer support means an inconsistent support experience. Customer success means a planned support experience which builds up the overall customer experience for your enterprise.

## **Step 3: Set clear goals with best practices in mind**

Look to what best practice organizations are doing in the area of customer focus. For example, best practices for customer-focused support organizations include capabilities such as extensive needs profiling and customer differentiation, closed loop issue resolution, and customization based on user preferences. After reviewing the gaps between customer expectations and your current support experience, set goals and prioritize which areas to improve based on how well those areas address the aforementioned customer expectations.

Customer support means making process improvements based on internal needs. Customer success means prioritizing areas for improvement which show visible results to the customer, based on *their* needs.

#### **Step 4: Create a balance between technical skills and soft skills**

If you were searching through ads for a position as a technical support representative, the criteria for employment might include the following: “able to provide knowledgeable, courteous, and prompt technical support; experienced in supporting and troubleshooting various hardware platforms.” If you were searching through ads for a position as a Southwest Airlines flight attendant, the criteria for employment might include this description: “need a fun-loving attitude, warrior spirit, and a servant’s heart.” No, I am not suggesting you hire flight attendants to staff your support center! However, the attitude, spirit, and heart mentioned in the flight attendant job requirements could be a little more present in most support organizations. Many departments include “sensitivity training” in an attempt to go beyond screen and system training with their support reps. However, this is typically not enough to help reps understand the part they play in creating a positive support experience, as well as in creating a return customer.

Customer support reps answer the questions given to them. Customer success reps understand that how they treat a customer, in addition to what they say, are critical to both customer success and company success.

#### **Step 5: Change the metrics**

I recently had the opportunity to shadow the support reps in an organization that had several different contact centers, each aligned with different businesses. Some of the contact centers I observed were providing good customer support, but their customers weren’t really satisfied. Neither were the support reps, and turnover was higher than desired. I also observed a few contact centers in the organization which were highly successful. These centers were able to satisfy customers and solve any problem. In addition, the support reps were happy in their jobs, and many of them had been moving up in the organization over the years. Support reps here spoke about their role in the organization with passion.

As may be guessed from the title of this section, the difference was the metrics. The high-performing contact centers were paid on customer satisfaction levels, as well as on customer retention. The less-successful contact centers were measured on “pay for performance”. Upon sitting with these reps, one could hear them rushing through calls, not taking the time to make notes in a customer file (unless absolutely required to do so), and not sounding very interested in solving the customer’s problem. It was stressful just to watch!

Customer support means closing the call as quickly as possible.

Customer success means taking the time to understand the customer, taking ownership of the case, and following up where necessary. The metrics and incentives employed make all the difference.

### **Step 6: Engage your channel partners**

Channel partners are often where the rubber meets the road, especially for outsourced support centers. They are a critical part of the customer experience for support. This may be the bumpiest part of the journey to customer success as contracts are re-negotiated and SLAs and training are updated. However, unless all channel partners are on board, customers will still “random acts of CRM” as partners do it their own way.

Customer support means different experiences with each contact. Customer success means consistent treatment that supports the brand experience.

### **It’s a journey rather than a destination**

Making the shift from customer support to customer success is an ongoing process. Technology will change. Customer expectations will continue to evolve. However, the goals shouldn’t change as you continue on the journey. Do it the way a customer would want it done, rather than the way the business/IT/product organization wants it done. Think “customer service” rather than “technical support”. Make sure customers can see the results of process improvements.

And don’t forget to pack your fun-loving attitude, warrior spirit, and servant’s heart.

### **About Becky Carroll.....**

*Becky Carroll is President and founder of Petra Consulting Group, a strategic consultancy helping companies achieve business growth through lengthening and strengthening customer relationships. An accomplished international speaker with more than 20 years of experience in the industry, Becky has helped her clients bring about success in their customer experience and support strategies, including companies such as HP, Fujitsu, Electronic Arts, and Ford Motor Company. Prior to founding Petra Consulting Group, Becky was a Senior Consultant with industry-leading Peppers and Rogers Group. Previously, Becky worked at Hewlett Packard for 14 years including roles as Director of Marketing, UK and Ireland and Worldwide Customer Loyalty Marketing Manager for HP Services. Petra Consulting Group recently won the inaugural Silver Senet Video Game Marketing CRM award for its work with Electronic Arts.*

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