

GUIDE

CUSTOMER SERVICE, SUPPORT, SUCCESS AND EXPERIENCE: THE GUIDE

Satisfying and retaining existing customers is an efficient way to scale your business without having to spend resources generating new leads.

NEW BREED 

ABOUT NEW BREED

We are a revenue management firm for the world's fastest-growing B2B companies. We serve over 200 B2B clients in a range of verticals including SaaS, telecommunications, IT services, manufacturing and business services.

Through the alignment of people, process and platforms, we drive success for our customers. Backed by our technical expertise and partnerships with HubSpot, SaaSWorks, Salesforce, Drift and Vidyard, our services and solutions not only address every touchpoint a prospect has with your company, they lead to proven, measurable and predictable outcomes.

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INTRO

Why does a business really exist? It's not because of the grand desire for innovation, though of course that plays a hand. A business really exists in order to fill a need in a given market. Products and services help solve problems. Problems are personal. Thus, the primary purpose of any company is — no great surprise! — serving the people, its customers.

Fulfilling that promise extends beyond the first purchase. Unfortunately, companies too often view their existing customers as an afterthought as they prioritize revenue and new deals.

Instead, they should prioritize based on value: Satisfying and retaining your existing customers can help your business grow much more efficiently, with less cost, than bringing in new customers can. Plus, delighted customers can become evangelists and refer new business to you, directly contributing to your acquisition arm and your company's total growth.

For any of that to happen, you have to adopt a mindset where the customer comes first.

Your product or service is supporting your customers' success. Whatever success means to them — hitting their numbers, looking good in front of their bosses or even returning a product with ease — you have to support it to achieve company growth. By acting in your clients' best interests, you're also acting in the best interests of your company and the individuals you employ.





Setting the Stage: Positioning Yourself to Delight Customers Before They've Used Your Product or Service

The business functions and disciplines that typically fall under the customer umbrella are varied and specific. But the first customer-facing discipline to discuss is one that might surprise you.

It's your sales and marketing.

That's because the first hurdle your company has to clear to create an amazing customer experience comes before your customer actually makes the purchase: you have to set the right expectations.

Doing so requires accurate scoping and honest marketing material, which requires open communication between your sales,

services and product teams. Your sales team needs to understand what your product or service can actually do and must be able to scope out timelines and required resource investments accurately.

When your product or service is oversold or misrepresented, it creates tension between the customer and whoever their post-sale point of contact is, whether an account manager, customer success manager or support representative.



The bottom line is poor expectation setting is the enemy of retention, regardless of where in the customer lifecycle it occurs. But, it's especially difficult to overcome during the handoff from sales to services because:

It wastes time right at the start of the engagement

Your team members will have to do damage control and work through the problems posed by the misrepresentation. All the time they spend backtracking prevents them from jumping straight into providing the customer with the real value of your product or service.

It breaks trust at a time when trust is already tenuous

As your customer enters the relationship with your company post-sale, they may have high hopes. Dashing those hopes in order to reset expectations makes it much harder for your customer-facing

employees to build up trust during onboarding.

Assuming you've nailed expectation setting during the marketing and sales processes, onboarding is the next high-impact moment: The first 30–90 days of an engagement are critical for the lasting relationship your company forms with a customer. To use this time effectively and create a smooth customer experience, you need to have smooth operational elements in place, such as your sales-to-service handoff.

A great handoff ensures internal operational change doesn't cause friction for your customer. That's critical because of the heightened stress directly following a purchase. The customer can feel a lot of pressure. They may get nervous and be poised to doubt. All of this is compounded with many changes in quick succession, as responsibility for the customer shifts from your sales team to your service team.

To mitigate all of this stress and avoid adding friction, manage the internal handoff with care.

First, designate a point person to maintain the budding relationship. Not only will this allow an entry point into the services group, but it will also provide stronger, clearer, more frequent communication.

Being overly communicative at the beginning of a relationship is critical: during the sales-to-service handoff, the customer is likely in the honeymoon stage and needs attention. They're focused and high-energy — your response should be too. To ensure you can respond appropriately, you'll need to be equipped with all the information they've previously given to your company.

Your sales team has a lot of insight to offer. They should pass the services team information about customer goals, the scope and timeline of the engagement,

which personas team members align with and more. An ideal handoff would also include suggestions for quick wins specific to the customer that capitalize on the momentum from the sales process and reduce time to value.

All of that information needs to be documented, in writing or via video, so that it can be referred to if questions arise.

Regardless of how well you manage the internal handoff, it's still important to ask about expectations once you're speaking directly to the customer, so you can mitigate any misconceptions as soon as possible. Don't go from sales to delivery without addressing the impression in your customers' heads.



The Business Functions That Contribute To A Positive Customer Experience

After onboarding occurs, there are multiple components that work together to delight your customer. These might not look identical at every company, but the general categories that should be represented are:

1. Customer service
2. Customer satisfaction
3. Customer support
4. Customer success
5. Customer experience

Of course, these five listed functions are frequently given overlapping definitions or used interchangeably. But they are unique areas that should be measured and managed with an understanding unique to each. That said, themes like expectation setting, communication and being open to customer input can be found across all areas.



Customer Service

Assisting your customers with the offering they bought from you and ensuring it's meeting their needs



Customer Satisfaction

Managing client sentiment



Customer Support

Solving the problems your customers have when things go wrong



Customer Success

Partnering with your customers to help them meet and exceed their goals



Customer Experience

Ensuring all of the above functions are working cohesively together to create something that resonates with your clients



CUSTOMER SERVICE

AND SUPPORT

Customer service and customer support are two sides of the same coin: one being proactive outreach to provide customers with value, the other being responsive help when things go wrong. Customer service and support essentially consist of you providing your customers with the product or service they purchased and ensuring it's functioning properly.

It's easiest to understand customer service in terms of how it's represented in the B2C world. Retail employees, hospitality workers and restaurant staff are all examples of customer service jobs. In the B2B world, how this role takes form will vary from company to company. It may include support reps, account managers or performance consultants.

Keep in mind that the function of customer service is different from your services team or function. Your services team is actually responsible for providing the service your company offers, such as app development, accounting or product installation. Whereas customer service is more akin to proactive support.

The support and service you provide will shape how your customers feel about you, which in turn can determine whether they'll continue their engagement with your company. Great customer support and service lead to low customer churn rates and high customer lifetime values.



How to Provide Phenomenal Customer Service



DESIGNATE A PRIMARY POINT OF CONTACT

While your support team is a great resource for customers to turn to when issues pop up in the moment, each customer should also have someone in your company responsible for servicing them throughout the entirety of their engagement — someone they can turn to whenever they have questions.

But who that contact will be depends on your organizational structure and the product or service purchased. For service companies, the point of contact

might be the person actually delivering and implementing services. For product companies, it might be an account manager or customer experience representative.

When you start an engagement with a client, determine how the customer wants to work with you:

Are you an extension of their team collaborating with them on strategy and execution? Are you just an execution partner, where they hand you the strategy and you just make it happen? Or, are you an outsourced partner doing most of the work independently?

Understanding the customer's team dynamics will help you determine who to communicate with and how to do so. Then, identify the constraints of the engagement: Are you limited by time, communication abilities, knowledge?



Based on the needs of the customer, the constraints of the engagement and internal capacity, determine who from your company would be an appropriate point of contact. Then, layer on a customer success manager (CSM) as a secondary point of contact to conduct follow-ups and ensure gaps are being filled.



DOCUMENT EXPECTATIONS

Setting expectations and then following through on them is a fundamental part of customer service and support. Ensure expectations are set and met through documenting checkpoints for yourself and your customers.

For example, if a customer calls product support about an error they're seeing, and the support rep determines that they need documentation from the customer before they can act, the support rep can follow up with an email summarizing what

data and documentation is needed from the customer and laying out the timeline for their response once they receive the necessary information.

After you have a call, meeting or conversation with a customer, always recap in writing and send that to them. This small but incredibly valuable action aligns all team members on next steps and helps everyone stick to goals and stay on track. Your ability to build and gain consensus on a schedule for moving forward is critical to providing excellent service and support.



COMMUNICATE CONSISTENTLY

Being proactive means staying in continuous contact with your customers. A proactive communications plan can help you avoid the tendency to overemphasize support, the reactive function.

That plan starts with identifying who the necessary points of contact are and determining what their needs are regarding cadence and channel.

Whenever you start a new engagement, confirm with the customer who the main point of contact will be on their end. Find out who else is involved. What are their roles?

For example, if you just sold a SaaS product to a company, your main point of contact may be the team leader for the business unit that benefits most from the software or a member of the user group. It might even be someone in IT.

While the end-users of the tool are most important to communicate with about product use, they might not have the authority for renewals, meaning that a higher-up decision-maker should be kept in the loop, too, even if they're not using the product. Someone leading the group

of end-users might be the best point of contact for your CSM because they'll have a more holistic understanding of how the software benefits the team and provides success.

But that will all depend on your product and the customer, so it's important to collect that information at the start of the engagement and to then incorporate staying on top of communications with the appropriate parties into your workflow. Mimic their communication style and match your outreach to their needs.

Some customers might prefer regularly-scheduled calls, while others might want short texts whenever something noteworthy happens. Some might need in-depth emails full of data and reasoning. Regardless, you should try to have some regular, proactive communication. Customer communication shouldn't be reserved for things going wrong.

YOUR BEST CUSTOMER CONTACT MAY NOT BE THE END-USER

While it's important to keep in touch with your end-users regarding actual product user, they may not be your ideal point of contact for your CSM. Consider staying in contact with higher-level decision-makers who may have a more comprehensive understanding of the team and play a larger role in future purchase decisions.



BE THERE WHEN THINGS GO WRONG

Things will go wrong that are out of your control, and occasionally issues will occur at such a large scale that they'll impact the majority of your customer base.

Maybe a natural disaster causes a power outage and downs the internet and phone tower, leaving your team unable to communicate with customers. Maybe a technical error causes a product outage for your software. Maybe there's a security breach that puts your customers' data at risk.

The first step to handling all those situations or similarly widespread issues is to evaluate how your customers will be impacted. Identify who will be affected

the most and reach out to them first. Then work to get ahead of the issue.

When emergencies happen, it's extra important to put your customers first. How you respond to a customer in distress can make or break the relationship.

However, the ethos of being there when something goes wrong isn't reserved for widespread emergencies. When your customers experience product issues unique to them, they may express distress, too. Your communication plan should be similar: evaluate the impact and reach out.



CUSTOMER **SATISFACTION**

Customer satisfaction is how the main point of contact feels about your product or service and also how that sentiment trickles down to the rest of their company. Do they feel like the value they gain from your offering is worth the price they pay for it? Is the way you're delivering service and support fulfilling their needs?

Satisfaction is also the baseline of a happy customer. Not every customer will necessarily become an evangelist who recommends your company to their entire network, but you should be able to satisfy every customer your company takes on.

Unlike customer support and service, you might not have employees whose whole jobs are devoted to customer satisfaction. Instead, it's a function that should be carried out by everyone who comes into contact with a customer. But, in order to enact a consistent standard for customer satisfaction company-wide, there should be someone overseeing customer sentiment.

This can be part of the job of someone overseeing customer experience as a whole, but they should take time to isolate the customer satisfaction component and analyze it independently.

How to Satisfy Your Customers

As is the trend with all areas relating to working with customers, part of satisfaction is establishing the right expectations from the start. Your employees should be aligned on your mission and vision, allowing them to fulfill your customers' goals, while your customers should be aware of how relationships will progress through their use of your product or service.

When there are gaps in understanding, people will fill them in based on their own beliefs and experiences and draw their own conclusions.

Without explicit conversations, clients can make assumptions about how the engagement will go and be disappointed if that's not how things turn out. Meanwhile, customer-facing employees at your company might feel like they're doing everything right and exceeding goals even though they're not living up to the clients' expectations. Those misunderstandings can be solved through an open dialogue. Sometimes this conversation involves

listening to customers' unrealistic assumptions and reframing them to match what the engagement will actually entail. Having a clear process for your services or documentation about your product will help you do this.

For example, if a customer were to start using a marketing automation platform and expected to immediately start generating 1000 leads a month even though without the tool they've been struggling to generate 50 a month, you can explain how they need to ramp up to reach that goal.

While the tool can help them drive conversions, they still need content for leads to convert on. While the marketing automation platform can help them run ads and social media campaigns that attract visitors to their website, they still need to know how to target good-fit prospects and what platforms they actually use. And, while a marketing automation platform can help them measure the performance of their marketing efforts so they can optimize their strategy, it takes time to collect conclusive data.





So, the point of contact for that customer should share the enthusiasm of the customer and acknowledge their goals, but they need to also explain what's required to actually reach them while still making the customer feel like they're involved in the process.

Don't let fear of disappointing a customer stop you from being transparent with them. It's better to have an uncomfortable conversation than leave them with a goal you can't possibly meet. Either way, your customer may feel let down, but if you're in control of the conversation you can work to reframe their expectations to become something more reasonable so you both can eventually feel like you've accomplished what you set out to do.

How to Measure Customer Satisfaction

Communication is key to understanding how satisfied a customer is, and on top of trying to understand how your point of contact feels, you should also try to gain insight into how the rest of their organization feels about your product or service.

You typically won't get unprompted feedback about how your product or service is affecting the rest of their organization unless it's something really good or really bad. For that reason, you'll need to remain aware of changes in the organization that might impact their use of your product over time.

Customer satisfaction can also be difficult to measure because it's almost always subjective. While you can refer to quantitative indicators like customer satisfaction score (CSAT), Net Promoter Score* (NPS) and Customer Effort Score (CES) to get a complete understanding, you need qualitative feedback that can only be obtained by talking with your customers.

Ask them about how they feel your product or service is fulfilling their needs and then dig into why they feel that way. In addition to talking with your customers, you can also gain information about customer satisfaction by looking at reviews and social posts about your company.



CUSTOMER SUCCESS

Customer success focuses on building trust with customers so you can help them exceed their goals and expand their engagement with your company. It's a completely proactive function, so for you to be able to focus on customer success with a client, they'll need to be on solid ground in terms of sentiment.

If the bulk of your interactions with a customer could be characterized as reactive responses to issues that arise, it'll be hard to build trust and offer long-term recommendations. To help your customers create and achieve long-term goals around their engagement with your company, you should have a customer success department and customer

success managers (CSMs) who work with clients proactively and strategically.

CSMs typically don't deliver service or product support, but they can help with communication and strategy across all teams. Their job is to oversee the success component of a customer engagement and expand your company's partnership with a customer through upsells and cross-sells.

When you have a strong customer success function, your existing customer base will directly contribute to your company's growth through retention and expansion opportunities.

How to Achieve Customer Success

From the client lens, customer success is determined by their desired outcome. Customers expect the product or service they purchased to help them reach their goals. In order to help their customers achieve that, companies need to have clear achievable goals set for the engagement so the company and their client are on the same page about what they're working toward.

These will differ from company to company and customer to customer. Two different customers using the same product or service can have different goals for the engagement. For example, a company might be leveraging a messaging tool in order to improve company culture or to streamline internal communications. Work with each customer to help them achieve their goals as opposed to focusing only on a general outcome your product or service can accomplish.

Customers might not always have attainable goals. Thus, an important part of customer success is properly scoping out how your product or service can help your customer reach their goals and what kind of results they can realistically expect to see. While this can sometimes result in customers having to lower their objectives, it can also lead to companies identifying new paths forward for their customers.

It's important to be honest and transparent as you're setting goals with your customers. This can lead to difficult conversations in the short-term but is necessary for a long-lasting healthy relationship.

You can't be afraid of losing business by being honest about what's achievable. If you won't be able to drive success for a customer, then they're not a good fit for your company.





CUSTOMER RETENTION RATE =
$$\frac{(\text{\# of customers you have at the end of the period} - \text{\# of new customers during that period})}{\text{\# of customers you have at the start of the period}}$$



NET PROMOTER SCORE =
$$\text{\% of promoters} - \text{\% of detractors}$$

How to Measure Customer Success

DATA FROM CUSTOMERS

Is your product or service helping your customers meet their goals? Do your customers consider your relationship to be successful? Where is this room for growth? Information along those lines will provide insight into how you're driving success for individual customers, but it won't provide the complete picture of how you're doing holistically.

RETENTION/CHURN

Retention and its inverse churn will show how well you're managing to continue doing business with your existing customers — one of the main goals of customer success teams.

Retention is your ability to generate repeat business from a customer over time. Churn is the rate at which you're losing customers. Both can be measured across individual product or service lines or across your company as a whole.

Measuring retention and churn helps you understand customer health and how well your company is delivering the value the customer was expecting. This information can be used to optimize your offerings and the way you deliver them to clients so that you can ensure that your engagements result in success.

NET PROMOTER SCORE (NPS)

While retention is a measurement of loyalty, Net Promoter Score demonstrates advocacy, which can be a stronger indicator of your business's health. Loyal customers can still part ways with your company, but advocates are actively working to help you grow.

Net Promoter, Net Promoter Score and NPS were developed by, and are registered trademarks of, Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld. The score is determined by asking the question "How likely are you to recommend [company, product or service] to a friend or colleague?" Respondents then rate your company on a scale of 1–10.

NPS tells you how accounts and contacts are feeling about their engagement with your company. It can be used to understand sentiment trends over time with specific accounts or your aggregate portfolio of accounts.

On the other hand, NPS can be volatile due to occurrences around when the survey is sent. Human nature makes people more likely to react negatively in the moment without taking into account the overall experience. One fluke can skew your NPS score from an individual customer.

Sending these surveys at a consistent, periodic basis (that doesn't overlap with a customer's renewal) can reduce your odds of getting skewed results, but that still won't eliminate volatility.





CUSTOMER EXPERIENCE

Customer experience is your customers' interpretation of success, support, service and satisfaction, and it's driven by emotion. You need to work to create experiences that resonate with your customers and engender positive feelings.

To do this, you need to make sure your product or service is responsive to the needs of your customers and enable your product and service delivery team to support your customers and fulfill their needs, even as those needs vary or change.

Because customer experience is the output of success, support, service and satisfaction, you can't create or manage it in a vacuum. The people within your company responsible

for customer experience need to have insight into not just how experience is the sum of the other functions, but also how those other functions work together to contribute to experience. Because of that, sometimes customer experience teams can be responsible for the other customer functions within a company. If that's the case, they need to make a concerted effort to not ignore individual impact of each component.

A great customer experience isn't created through a single "wow" moment. It has to be built up consistently through every interaction. It's not flashy; you just need to continuously provide your clients with value.

How to Create a Great Experience

First, determine what you want your customer experience to mean for people. What do you want your customers to remember? What are your service delivery team members actually trying to accomplish?

Once goals are clear, ensure your team has the resources to accomplish those goals and your organization is structured in a way that supports those goals. If your customer-facing employees are incentivized based on their performance, make sure the metrics they're measured on can actually result in a better customer experience.

For example, a support team shouldn't just be measured on how many tickets they can resolve in a given amount of time, but also how well customers feel their issue was resolved. A strategic consultant shouldn't solely be measured on the

delivery of results now, but also given the ability to experiment and be measured on efforts to improve performance long-term.

ALLOW CUSTOMER INFLUENCE

The least empathetic action you can take is to make decisions on behalf of your customers without obtaining their feedback. It's your job to create an experience that matters in each and every moment.

By allowing customers to shape their own experiences, you're creating something unique and personalized for everyone instead of forcing them into a pre-built mold. Your tailored efforts raise the quality of the experience you're creating.

ELIMINATE HANDOFFS

One way to improve the customer experience is to try to replace handoffs with swarms. Handoffs can be jolting for customers, especially if their points of contact and communication methods are changing.



YOUR CUSTOMERS ARE PEOPLE TOO. LOOK BEYOND BUSINESS CONVERSATIONS.

Customers are more likely to purchase from someone they feel close to as a person and will likely feel more comfortable approaching them when potential issues arise.

So instead of passing customers from one internal team member to the next, the idea behind swarming is to introduce customers to multiple people they'll be working with early on so a familiar team can support and guide them throughout the entirety of the engagement, even as temporary points of contact, like sales reps or onboarding specialists, end their involvement.

For example, one of the biggest handoffs that occurs is the transition from sales to services once a deal is closed-won. Unfortunately, that transition often poses a poor experience for customers due to internal processes not always being communicated, uncertainty about who to turn to with questions and information not being transferred from team to team.

Address these issues by involving service team members as a deal approaches closing. Bringing account managers, customer success managers, designated support reps and maybe even specialists into the sales process can help eliminate miscommunications. Service members will be more aware of what promises are being made, and the prospect will know what will happen — and who they'll work with — once the deal closes.

BUILD RAPPORT

Ultimately, your customers are people, so as you work to build your relationship, try to extend beyond just business conversations.

While you do need to feel out customers on a case-by-case basis, devoting a portion of your conversations to connecting on a personal level can help all parties understand each other better. That can open a lot of doors for communication and problem-solving and make it easier to have difficult conversations.

When your customers are comfortable with you and feel close to you as a person, they're more likely to come to you when things aren't going well as opposed to not communicating, getting upset and not renewing.

When you're talking to someone you don't know, it's a lot easier to put problems before solutions, especially when the conversation is purely transactional (as support requests tend to be). But creating just a little bit of emotional intimacy can make customers more receptive to working through solutions as a team.



Using the Customer Journey to Track Customer Experience

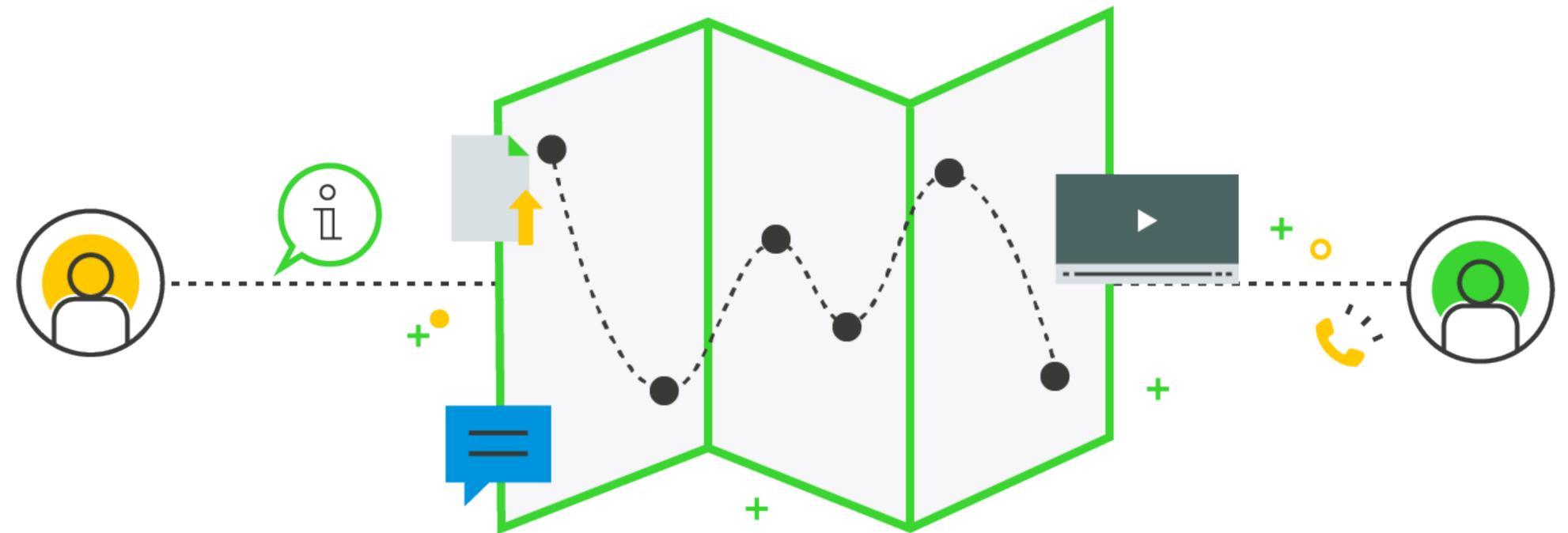
You can't really quantify customer experience, which makes measuring it difficult. However, you can track how customers are engaging with your company and how that relationship develops over time using the customer journey.

The customer journey is a framework for client nurturing. It contains all of the touchpoints customers have with your company and can be used to understand the experience your customers are having.

It can be used to aggregate quantitative and qualitative insights so you can automate triggers based on client behavior. The combination of performance data and emotional data can help you understand the experience your customers are having and respond appropriately.

For example, if you notice concerns about the results being driven, you can promptly respond with actions that can help them to become more successful.

A well-developed client journey can solve many business challenges.





Measuring the client journey helps you track goal attainment, flag at-risk accounts, prioritize accounts, support teammates and clients facing common problems and identify opportunities for future growth — for both individual accounts and your customer base as a whole.

The stages of the client’s journey should be tailored to fit your company. As a whole, it should represent the spectrum of relationship types a customer might have with your company.

Common customer journey states include:

- **Unengaged or At-Risk:** While a customer is paying for your product or service, they’re not really leveraging them or engaging with your company
- **Reactive:** Your engagement with a customer is focused solely around providing support and service based on the requests that customers ask of you
- **Proactive:** You’ve built up enough trust

with a customer to proactively provide recommendations around how they’re leveraging your product or service

- **Strategic:** Your customer views you as an extension of their team and seeks your input regarding everything related to your engagement
- **Partnership:** Your customer views you as an extension of their team, and they seek your input on topics outside of the scope of your engagement

Whether the information you’re using to track a customer’s progression through these states is quantitative or qualitative, you need processes in place to collect and analyze data across multiple platforms.



THE **TECH STACK** NEEDED TO

SUPPORT CUSTOMER RELATIONSHIPS

Tools will come and go, but there's a balance between tools and process. While not everything should be automated, technology can enable you to really be there for your customers.

These are the necessary components of a tech stack so you can manage your relationships and communications with customers.

COMMUNICATION TOOL(S)

Not all customer communications can occur in person, but consistently communicating is key to maintaining a healthy relationship. While you can communicate via text, phone call, email, chat or video, you also need to be able to record those conversations so you can reference them later on.

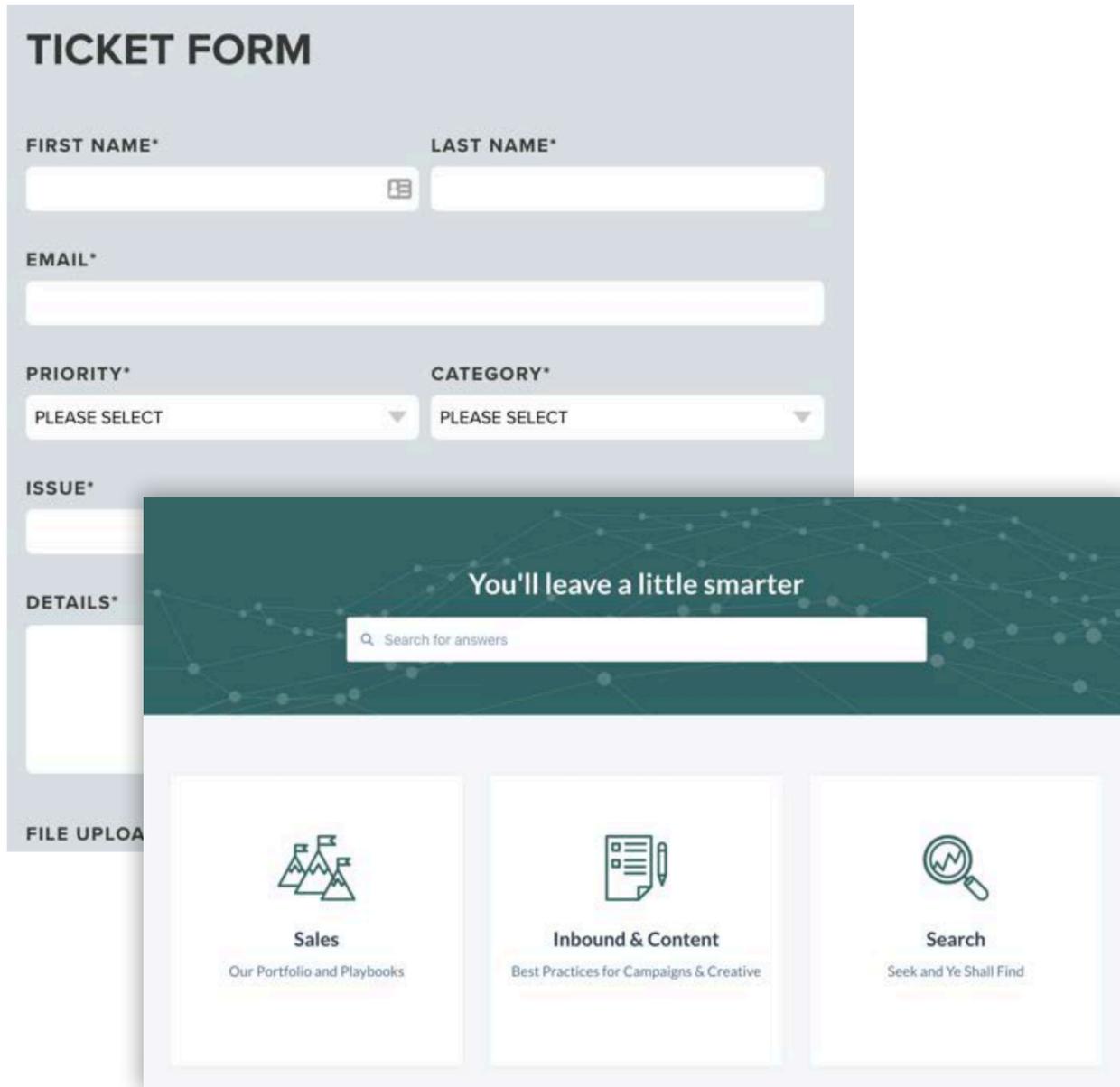
In some cases, a project management tool can serve as a communication hub, but you can also use messaging tools or teleconferencing tools.

PROJECT MANAGEMENT TOOL

A strong project management tool can help bridge the gaps between sales, internal communications, customers, timelines and deliverables. Without one, it's difficult to hold everyone accountable and monitor how tasks are being completed.

PAYMENT PROCESSING TOOL

On the billing and collection side, you need to be able to receive payment from your customers, whether that's through charging them directly or sending invoices. Try to make it as seamless as possible.



CUSTOMER RELATIONSHIP MANAGEMENT TOOL

A customer relationship management tool helps you understand how a customer moves through the customer journey from reactive state to advocate. These tools can help you monitor both high-level lifecycle stage progressions and tactical challenges that occur week to week.

Relationship management tools allow you to track interactions, take notes and make that information accessible to everyone who's working with a customer.

KNOWLEDGE BASE

Knowledge bases are customer-specific resource libraries that provide self-service support for your customers.

By using your knowledge base to answer common questions about your product, service or industry, you can increase your customer support team's efficiency so they can spend their time providing personalized answers to case-by-case questions instead of answering questions that can be addressed through a FAQ page.

Knowledge bases are also beneficial for your customers because it's often quicker and easier to search a knowledge base for an answer than reach out to a customer support rep.

TICKETING SYSTEM

When things go wrong, ticketing systems enable you to solve problems as quickly as possible and ensure the right people know what's going on.

By using tickets, you can provide your customers with a clear process for support outreach and make it easier for your support team to triage requests.

FEEDBACK AND SURVEY SOFTWARE

As we mentioned, it's important to collect both qualitative and quantitative information when interacting with your customers. Asking questions to measure NPS, CSAT and CES are extremely useful to measure customer advocacy, sentiment and satisfaction. Feedback and survey software allows you to collect that information at scale.

A man in a white shirt stands at the head of a long wooden table in a meeting room, holding a red mug. He is addressing a group of people seated around the table. The room has large windows with a view of a city. The background is a dark grey gradient.

WHAT ROLES MAKE UP

CUSTOMER-FACING TEAMS?

The structure of your customer-facing teams will depend on the size of your company and how customers use your product or service. Here are some of the roles you might employ at your company.

CUSTOMER SUPPORT REPRESENTATIVE

Customer support reps communicate with customers about any problems or questions that arise in their use of your product or service. These communications can be through email, phone calls, live chat or social media.

Customer support reps might not always be able to solve the customer's problem themselves, which is why triaging and ticket distribution can be part of this role. A customer support rep needs to be able to

communicate with a customer, recommend relevant self-service support resources and, if none of those solve the problem, forward the customer's query to an appropriate specialist.

CUSTOMER SUPPORT SPECIALIST/ TECHNICAL SUPPORT REP

Customer support specialists' jobs are similar to customer support representatives. However, customer support specialists have the technical knowledge to solve a customer's problem on their own.

In some cases, a customer support specialist may still handle initial support outreach communications through email, phone or chat, but they may also just receive tickets from customer support reps and focus solely on resolving those tickets.

CUSTOMER SUPPORT MANAGER

Customer support managers oversee a support team and their processes. They're responsible for setting goals for the team, empowering their team members to reach those goals and communicating support trends with the rest of the company. Customer support managers also help train new support reps and facilitate continued training for the rest of the team.

CUSTOMER SUCCESS MANAGER/ CUSTOMER SUCCESS ASSOCIATE

Customer success managers (CSMs) assist individual customers to leverage your company's product or service. Their goal is to optimize the value your customers gain from their engagement so that they don't churn.

In order to facilitate customer success, CSMs need to communicate with marketing, sales and your product or service team to understand what expectations and goals your customers have — and how they can help customers reach those goals. CSMs may also be responsible for monitoring your company's customer journey and tracking client progress.

CUSTOMER SUCCESS TEAM LEAD

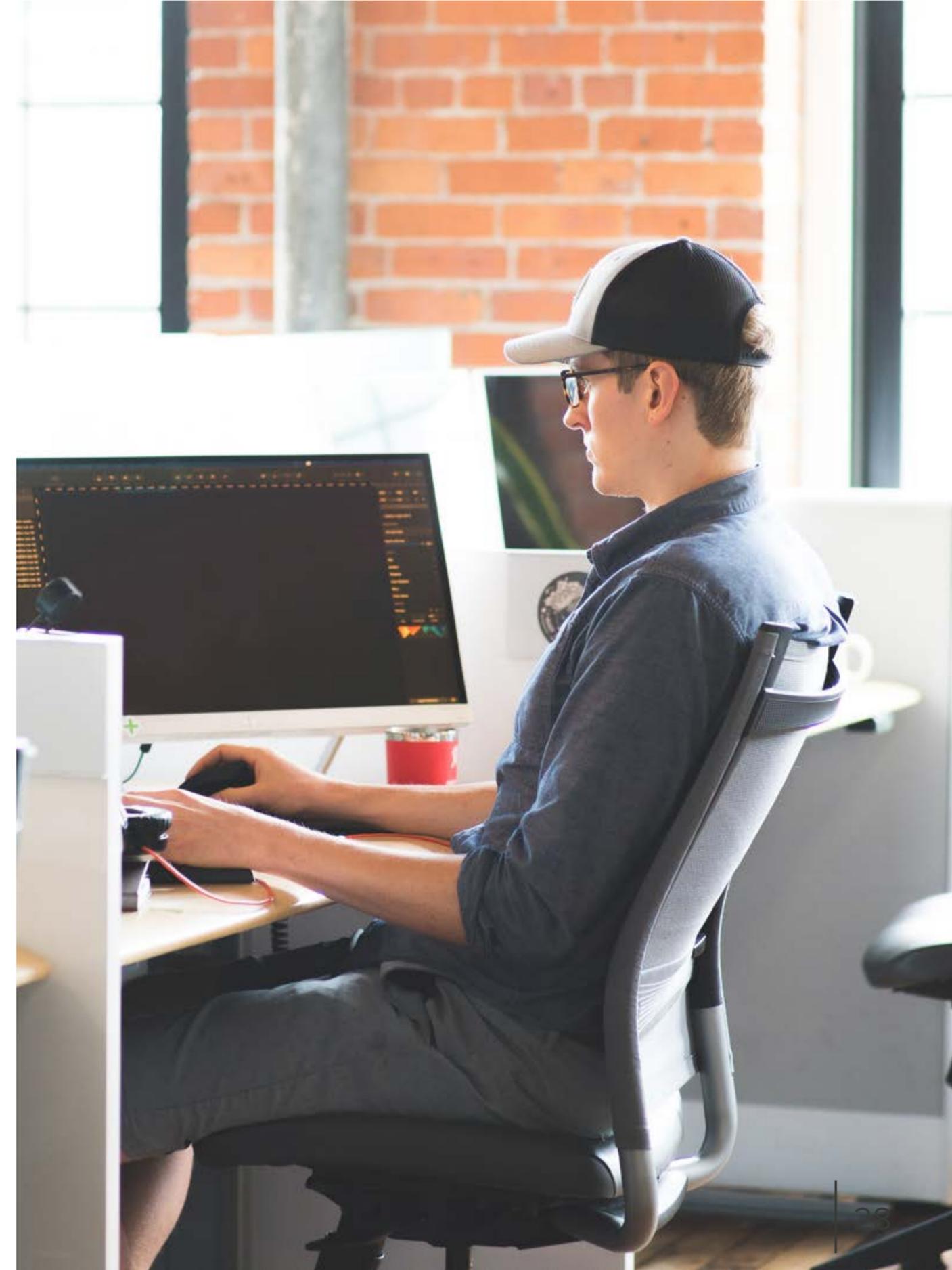
Customer success team leads oversee customer success managers. They help train new reps, set goals for both individuals and the team as a whole, track how their team's performance is contributing to the overall success of the company and assist with escalations when needed.

CLIENT EXPERIENCE MANAGER/ CUSTOMER RELATIONS MANAGER

Client experience managers work to ensure satisfaction across a company's client base.

They are responsible for collecting and analyzing customer feedback such as NPS surveys and product or service reviews. Additionally, they work across all customer-facing teams to help create a consistent, positive experience.

They may also be responsible for customer journey mapping and progression tracking in collaboration with customer success managers.





CLIENT RETENTION MANAGER/AT-RISK CUSTOMER SUPPORT MANAGER

Client retention managers work specifically to decrease churn and improve sentiment for at-risk accounts. They may be consulted by customer success managers or support reps to help with escalations or be responsible for monitoring accounts for signs of escalation themselves.

This role typically requires collaboration with multiple teams across a company to ensure the needs of at-risk clients are met.

IMPLEMENTATION/ONBOARDING SPECIALIST

The specifics of what an implementation or onboarding specialist is responsible for will depend upon a company's product or service. This specialist is responsible for overseeing the sales-to-service handoff and facilitating implementation or onboarding for customers.

For a SaaS product, this role would be responsible for setting up the tool to meet a customer's needs, helping them become

familiar with how the tool functions and encouraging adoption. For a service, this role might be more focused on introducing a customer to their main points of contact for service delivery.

In some cases, this job isn't a standalone role but rather tasks split between customer success managers and operations specialists.

CUSTOMER SERVICE REPRESENTATIVE/ PERFORMANCE CONSULTANT

Customer service representatives proactively reach out to customers with offers, product details or strategic recommendations. Their role is a hybrid between customer marketing, sales and account management. It involves proactively helping customers gain more value from the company's offering and trying to upsell or cross-sell.

Customer service reps typically work with a high volume of accounts but have minimal touches with each individual customer.

CUSTOMER SERVICE MANAGER

Customer service managers oversee the customer service team and ensure all reps are meeting their goals. They will assist with any problems that arise and mentor team members.

Additionally, they will train new reps and facilitate the team's continued training, including keeping all reps up to date on any company changes that will impact their customer outreach.

OPERATIONS SPECIALIST

Depending on the size of an organization, the operations aspects of customer service, support, success and engagement can be enacted by the business's general operations team, split among members of a general operations team or be a standalone role.

- **Service operations specialists** oversee the tech stack that enables product or service delivery. They are responsible for setting up systems of measurement, ensuring all technology functions properly for customer-facing teams and maintaining systems for collecting customer feedback.

- **Customer support operations** specialists are responsible for maintaining the tech stack used for ticket management, triaging and support communications. They'll need to ensure ticketing systems are functioning properly and customer support managers are able to monitor and measure their team's performance.
- **Customer success operations** specialists manage the technology and processes used by customer success teams. This can include setting up the tools necessary for customer journey mapping, establishing systems of measurement and ensuring customer communication platforms are functioning properly.

CHIEF CUSTOMER OFFICER

A chief customer officer (CCO) is an executive position that is responsible for overseeing customer-related initiatives and ensuring a company is actually operating in its customers' best interests. They make sure that customer service, support, success and experience strategies are unified across departments and that customers are represented in executive decisions.





The Minimum Requirements for Smaller Companies

If you're really strapped for resources, you can consolidate your company's customer support/service/satisfaction/experience/success function into a two-person team with the help of automation.

This team comprises of:

- One service delivery member who's an expert at solving problems and delivering services and support
- One person responsible for communications and operations who handles meetings, task management and budget capacity in addition to enabling the service delivery member to do their job most effectively

Both need to be checking the other's work. Your service delivery specialist focuses on delivering what the customer needs to meet their goals while the communication and operations role focuses on maintaining the relationship. As the amount of resources you can invest in your customer-facing team

increases, then you should add more service delivery members to increase the amount of work you're capable of doing.

Once you have three delivery members and one communications and operations person, you'll need to add an account manager to ensure the whole system is operating smoothly.

From there, you can replicate the system and create more account teams with that same structure and look at how you can optimize your teams.

In terms of the minimum viable functions your customer-facing team needs to accomplish, you need to be able to:

- Act as a point of contact during the handoff from sales
- Onboard the customer to the product or service
- Deliver ongoing support or services
- Oversee communication and project management
- Provide insights to the customer's leadership
- Optimize the process over time

A woman with a large, intricate braid of brown hair is shown from the back, looking towards the left. She is wearing a light-colored, textured sweater. The background is blurred, showing what appears to be a conference or meeting setting with other people and a water bottle.

GETTING HELP

Delighting your customers takes more than just a great product or service, and it can be a big responsibility for a company to handle all by themselves. But, in order for a company to succeed, they can't neglect customer support, service, satisfaction, experience and success.

One way to accommodate a lack of bandwidth or expertise internally is to bring on a partner to help you manage your customer relationships. A partner can act in a consulting capacity, helping you expand your capabilities or can even take essential customer functions off your plate entirely.

To determine if it might be worth bringing on outside help, start by examining the goals you're trying to achieve with a customer-facing function, both short- and long-term. What resources do you need to prioritize?

After you understand what resources you need to accomplish your goal, look at the skillsets your team has. If there's a misalignment between the two, that's a good sign that you should bring on extra support. Use your goals, current competencies and budget to determine whether to layer on team members internally or outsource the skills you're lacking.

Expanding your team is great if you're at that point in scaling your business, but it takes time to hire and ramp up new employees. Experienced partners can start providing immediate value so there's no gap in your ability to meet your customers' needs.

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