PUTTING THE CUSTOMER AT THE HEART OF CUSTOMER SERVICE

A Best Practice Guide to Integrating Customer Service and CRM

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Is customer services the weak link in your business model? Why create a slick and sophisticated sales and marketing model to acquire customers, only to lose them as a result of a bad customer services experience? Good customer services is essential to:

- Improve retention rates.
- Ensure customers make the best use of a product or service.
- Identify opportunities for cross-selling or up-selling, especially for consultancy or professional services.

An effective CRM should be at the heart of all of these activities - but how many organisations regard the CRM as nothing more than an unsophisticated way of recording customer data? Can customer services use the CRM to:

- Prioritise cases based on actual customer demands?
- Monitor performance in real time?
- Identify bottlenecks?
- Inform on-going product development?
- Deliver measurable business value?

To discover the 7 steps required to move from a primitive use of CRM to a highly sophisticated approach that embeds CRM within the corporate growth model read on...

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Prioritise Activity

What happens when a customer raises a support issue – via telephone, email or the website? Some organisations deal with each case on a first come, first served basis. But does that make sense for your business? Creating a customer services culture that reflects the needs of an organisation's customer base is a critical step:

- What is the customer's Service Level Agreement (SLA)?
- What is the severity of the problem – should a customer with a non-urgent question about a product or service really be dealt with before a company that has a business critical issue?
- How many times has the customer called in with the same problem? Is this really a support issue - or does it require escalation to product development or account management?

Of course all customer issues are important – but some will clearly be a higher priority. Great customer service should reflect the real nature of the customer call.

Capture every Case

Using scripts within the CRM system, customer services can ensure the severity of the customer event drives the prioritisation of response.

The only way a company can understand how well – or not – it is delivering customer service is to track every customer interaction, in depth.

While the customer service experience will begin when a case is logged, typically via email, phone or the web, it is the effective management of that process – and customer communication – right through to completion, that is key to customer retention.

The first step is to ensure that any support requests are automatically logged within the CRM and that a response is sent to the customer saying case number 1234 has been raised.

Each request should then:

- Go through a triage process to determine the severity of the incident.
- Receive a priority rating.
- Generate an automated customer response – typically via email – confirming receipt of the customer case.
- Create a first response when customer services starts to work on the case - either confirming the issue is being investigated or requesting further information.

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Track Progress

For any customer services team, juggling workloads and managing priority cases can be difficult. Time stamping each step of the way is key to ensuring customer cases progress smoothly through to resolution. Use time stamping:

- When each customer service request is received – or when the team starts each day, if received out of hours.
- When the first (non-automated) response is generated – via email or phone – to inform the customer of the next stage in the process.

This enables the CRM to automatically set a number of targets – including the time and date of when the resolution is due (to fit the SLA).

By automatically calculating these times, the customer services team:

- Has a clear list of priorities to work through.
- Can see if there is a risk of a case missing its resolution due deadline and react fast.
- Has accurate timing information to discuss with a customer in response to a complaint or query.

Using dashboards to share key performance and case status metrics on a big screen – with figures turning red to indicate when a deadline may be missed - provides the customer services team with a visual cue to support effective working.

Monitor Performance

Using the reporting facility within a CRM system also provides the customer services team with an excellent insight into performance. Reports can cover a multitude of performance metrics, including:

- Number of cases opened this week.
- Number of cases awaiting a first response.
- Number of cases closed this week.

Performance can also be monitored by individual agent and by customer.

- **How does agent performance compare?** Drilling down through the top level information to understand performance differences can be very informative – lower apparent performance figures may be because an agent has been out of the office for a day; or because he is very experienced and hence routinely allocated the most complex and time consuming cases.
- **How does customer performance compare?** Are some customers more demanding than others – and if so, why?
  - A 'top five customers' list – by number of cases raised – each month, can be interesting:
    - Are new customers making the most calls?
    - Do customers need more training?
    - Is there an on-going product/service problem?

Combining top level dashboards with in depth information enables the Customer Services Manager to improve both day to day and longer term management.

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Share Insight

For any company, customer services can provide the first sign of a potential problem in the customer base. Capturing that information and understanding trends in customer requests and activity can provide vital insight to support effective changes across the business. For example:

- **Knowledge base:** Can repeat problems be addressed by improving the quality of the information on the website, to help customers resolve their own problems at any time?
- **Development:** If enough customers are citing the same issue, should engineering or product development be involved? Does the company need to fix a fault or is there an opportunity to create an enhancement.
- **Consultancy/Training:** If the same customer keeps coming back with the same problem, is the issue one of training rather than anything else? Detailed information regarding the number and type of calls raised will enable a frank and open discussion with the customer that could result in additional training and/or consultancy work.

By capturing the information within the CRM, everyone from the Account Manager to senior management has real time access to this information – it should be a go-to resource before any customer interaction.

Extend Self-Service

Every customer services team will have a top ten, twenty, even fifty questions routinely received from customers. As a result, switched on organisations will have invested in creating a good online knowledgebase that should be a customer's first port of call for addressing standard issues.

In addition, most companies enable customers to log support calls via the website.

Extending that model by providing a dedicated support portal can further improve the customer experience - whilst also reducing the demands on customer services. Using a portal customers can:

- Log support issues.
- Track the case status.
- Upload additional information if required by the support team to resolve the case.
- Monitor the number of support issues raised, with reports including:
    - Number of cases logged.
    - Average resolution time.
    - Number of cases still open.

By providing this simple access to information, a company can build a stronger, symbiotic relationship with the customer base.

Open the Window

Customer services should be a window into the health of the customer base – but without a way of effectively capturing each customer interaction, not only is it impossible to prioritise activity and ensure a good experience but the business has no way of knowing just how happy – or not – the customer base may be.

So how evolved is customer services today?

- **Is customer services able to prioritise customers based on need – or is it a blanket, first come first served approach?**
- **Does the customer services manager have any idea how effectively agents are performing?**
- **Can customer services identify customers that require consultancy or training? Or those that might be at risk of disappearing to the competition?**
- **Do sales and account management have any idea what is going on with their customers?**

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