How to Create Your Customer Support Function From Scratch: 5 Phases

By Queen Joseph

Easily Build Your Customer Support Org from Scratch

© 2020

Set Your Team Up for Success

NEW! Scroll to the end of this guide to watch my video overview

Your customer support operation is ever-evolving and will change as your company grows, and business needs change.

Creating a streamlined customer support operation is much more than just installing software and creating a support email address.

In this guide, I'll walk you through each phase (in order) to help you create an organized, customer-centric support operation from scratch.

Best practice tip: document your processes and procedures in an internal wiki or playbook and share it with your team.

Create Your Blueprint

The first thing you need to do is create a blueprint. A blueprint is the foundation of your customer support org. Think of construction. Before buildings are built, they are designed first on paper.

The blueprint helps you figure out what processes you need to create, your support standards, and how to structure your org and team. Your answers to the questions/statements below will help you create the blueprint or playbook for your org.

- What does customer support mean to you?
- What does success mean to your customer support team?
- What are your goals?
- Do you have any current pain points or problem areas?
- What kind of support will you offer or what are your support options (i.e. email, live chat, bots, text, phone, social media)?
- What is the job responsibility of your customer support team? For example, will they provide customer training? Will they respond to support inquiries only? Will they troubleshoot with customers (technical support)? Will they do any proactive outreach?
- What is the name of your support team? What are their job titles?
- Will you offer support to ALL customers (paid, free and website visitors)?
- What are you promising your customers in their SLA, contract, or terms of use?
- What metrics do you want to measure or matter to you (i.e., chat response time, chat ratings, bugs, etc.)?

Create Your Blueprint Continued

- What are your support hours? Consider the timezones of your customers.
- What is your standard turnaround time (ex: 24 hrs, 48 hrs)? Consider SLAs. For example, you may offer enterprise customers 24 hrs to respond to support inquiries.
- What are your support standards? Do you want to be known as a company with a customer support team that goes above and beyond? Do you want to be known for friendly customer support? Do you want to be known for a fast, quick response?
- How will your team handle product feedback and feature requests?
- How will your team handle sales related questions or prospect questions.
- How will your team handle bugs, escalations, reports of outages, and product issues?
- Who will handle the technical aspect of fixing bugs and product issues, and how will they be notified?
- How will your support team handle customer follow-ups? Closing the loop
- Create your P-level system (P0, P1, etc.). State of emergency.
- Is your product 100% self-serve, 100% hands-on (CSM), or a combination of both?
- Do you want to create a learning management system (LMS) or a knowledge base help center?

Customer Support Software Research & Purchase

After you have your blueprint, the next thing you need to do is research and purchase a customer support software tool.

The questions and statements below will help you decide what software tool is right for you.

- Who will install the software?
- Number of user licenses (who needs access)
- Do you want the software for other teams/departments as well (ex: marketing, sales)?
- Does the tool offer customer support ticketing?
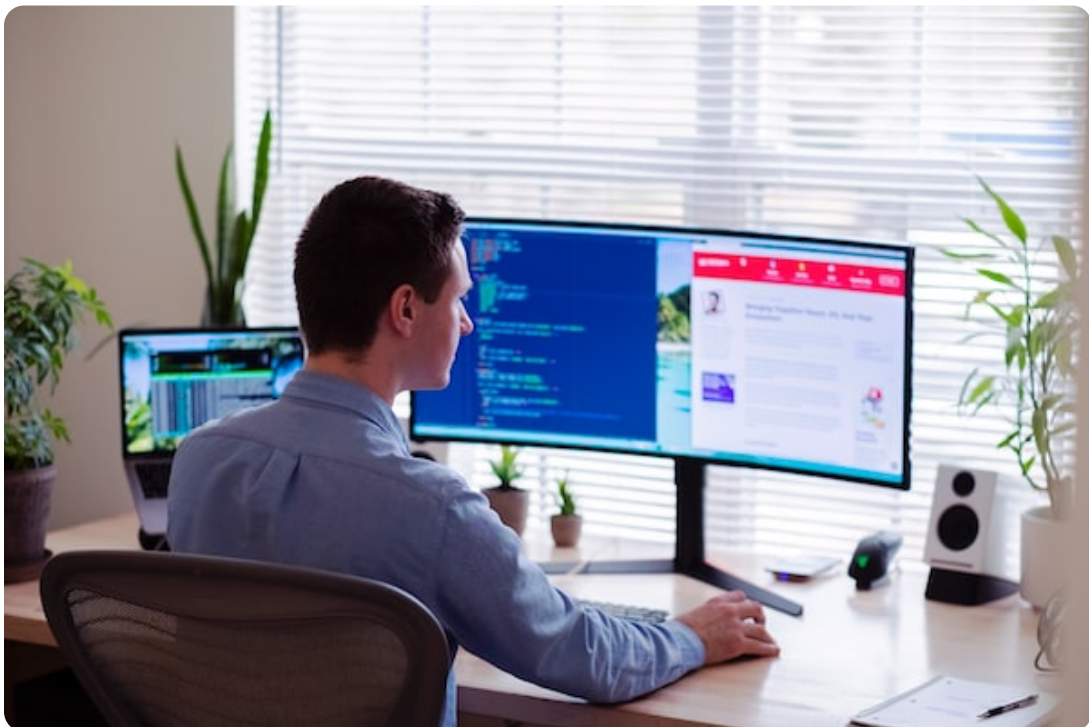
Knowledge Base Help Center

After you've purchased a customer support software tool, now you are ready to create your knowledge base (KB) help center.

The purpose of a KB is to share resources, FAQs, and best practice tips to educate and empower your user base.

What to include in your knowledge base help center:

- Articles
- How-to and product demo videos
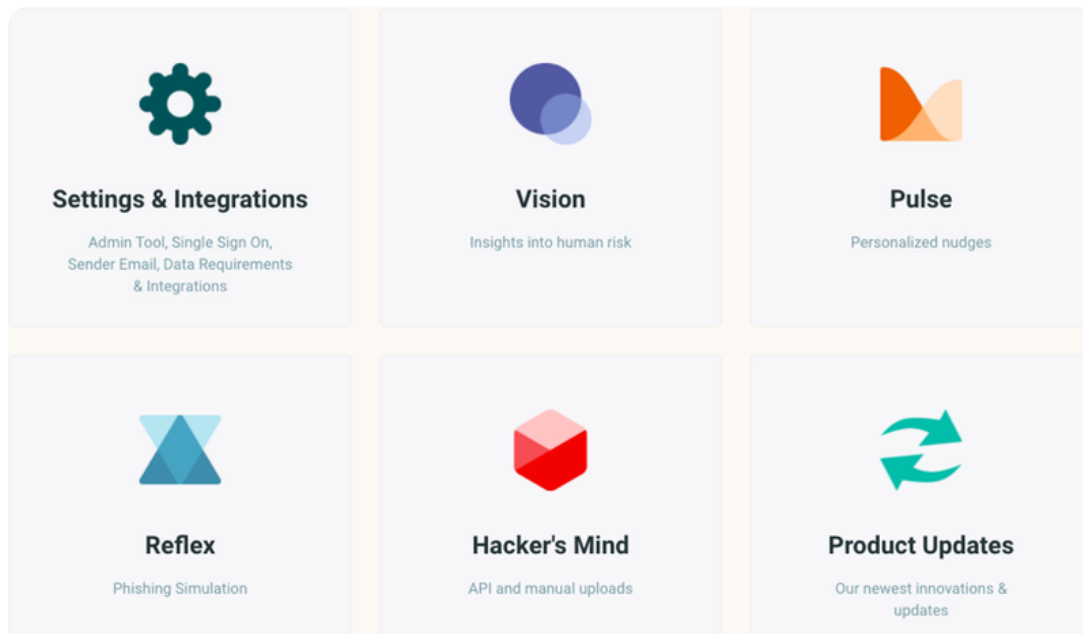- Optional: a community forum
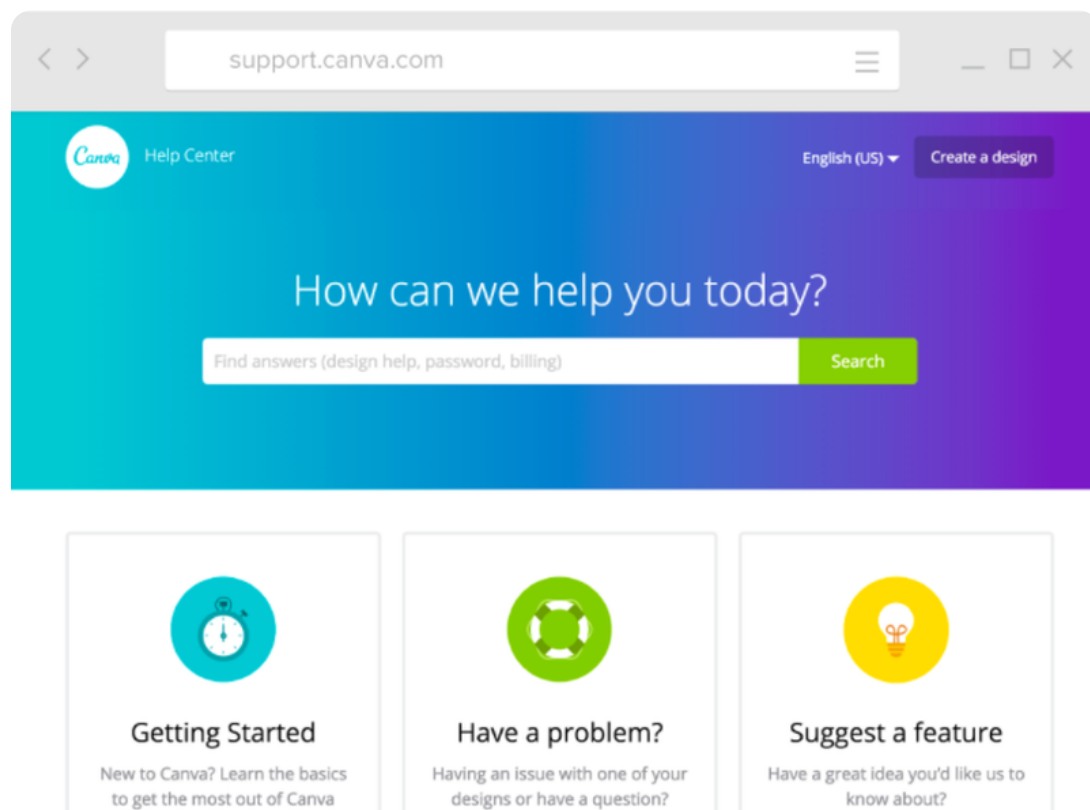
Knowledge Base Help Center Continued

How to structure your content:

- Organize by type of content and group together like content, such as how-tos, products, features, account settings, FAQs, getting started, etc.)
- Match the flow of user experience
- Arrange by video vs. articles

Settings & Integrations

Admin Tool, Single Sign On, Sender Email, Data Requirements & Integrations

Vision

Insights into human risk

Pulse

Personalized nudges

Reflex

Phishing Simulation

Hacker's Mind

API and manual uploads

Product Updates

Our newest innovations & updates

Knowledge Base Help Center Continued

Best practice tips for article writing:

- Write short articles (1-3 paragraphs)
- Longer articles include white space, headings, and break paragraphs. Use a table of content (anchors)
- Include videos, GIFs, or screenshots in articles
- Avoid writing in technical gibberish. Write like a 5th grader (basic terms)
- Write from the customer's viewpoint
- Write short and descriptive article titles
- Include appropriate tags and keywords for search purposes

Software Setup

After you've created your KB, now it's time to fully set up and customize your customer support software tool. The blueprint you created in Phase 1 will come in handy here.
Note: If you start a KB help center from scratch, it may take some time to complete it entirely. You can always go back and continuously add new articles and content.

Do each of the below to fully set up and customize your new customer support software tool to fit your needs and workflow.

- Create templates, and canned responses for auto-replies, bug intake, common questions, etc.
- Create tags, categories, or labels to track common issues, questions, and bugs
- Set up conversation feedback or ratings
- Set up automation workflows or routing (if applicable)
- Set up chatbot and triggers
- Create and test the process for escalation workflow (i.e., enterprise, high priority customers. created in Phase 1)
- Create and test the process for product feedback workflow (created in Phase 1)
- Create and test the process for ticketing workflow (created in Phase 1)
- Test and go through your support team's entire workflow
- Choose each customer support rep's role type and invite to the platform
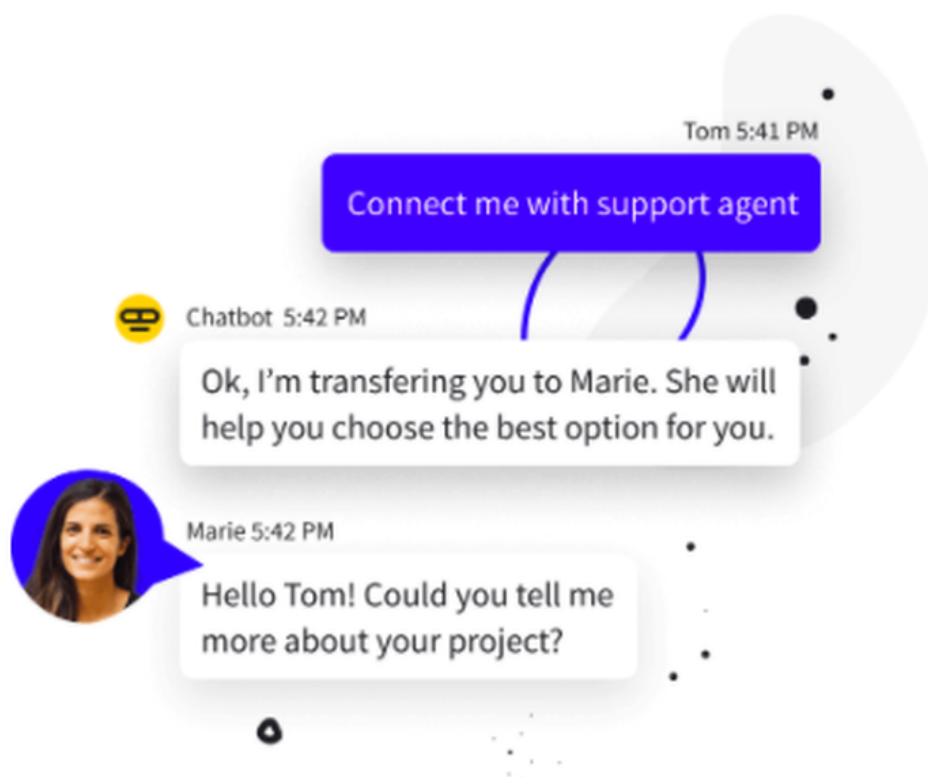- Train your support customer reps before go-live day

Go-Live!

Congratulations! 🎉 Your customer support software tool is now launched!

Phase 5 is the last phase. Your customer support team is ready to support your end-users!

By Queen Joseph

Easily Build Your Customer Support Org from Scratch
© 2020

Need help creating your customer support org?

Your customer support team is the face of your company.

Besides hiring customer-friendly customer support reps, you want a streamlined org with structure, appropriate processes, and workflows to help your team work efficiently.

I've led and managed many support operational projects. Get in touch and let's see if I can help you.

SCHEDULE A DISCOVERY CALL