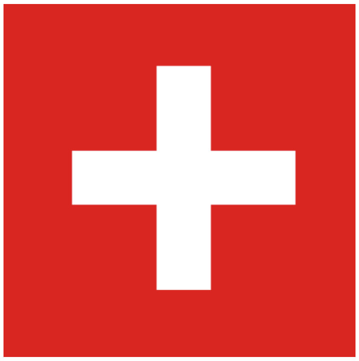

Support Kit

A step-by-step guide for creating your customer support experience.

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supportops.co

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Version 1.0

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All that to say this - be smart. Do your homework on everything I talk about in this guide since I'm not responsible if you make your customers angry. And feel free to use brief parts and quotes to share with your team. Just don't go posting the entire guide for free on the Internet. That's not smart or cool.

Now with that out of the way, on to the good stuff!

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Introduction

INTRODUCTION

Imagine a space filled with customers. Each faces a distinct problem. The lady over there? She can't log in. The gentleman to your right? A charge from your company shows on his credit card statement but he has no clue why it's there. Then hear that loud guy in the corner? He's shouting at you because he can't get something to work right. The kicker is that it's something wrong on his end—he's just blaming your app because he doesn't know what's going on.

They're all looking at you because you're the link to the company. You're the person that can get them logged in, find their charge, and fix what was broken. You're there to support them and help them be more awesome in their work.

So how do you do that?

This guide started with one question that I am asked all the time:

"I've got a great product. Now how do I support my customers?"

Support Kit will help you do customer support right.

Customer support is not a hard concept. Someone has a question or a problem and it's your job to fix it and make them happy. When done right, it can set you apart from your competition. An app can be recreated easily. A rocking support experience is much harder to copy. When customers know they're going to get great support, they'll usually choose you over the competitor.

But if you do it wrong, it can undo everything that you've worked so hard on with your company. Customers will start leaving you behind as they find a company that can provide that support experience they're looking for.

"But Chase, it costs money!"

Yeah, customer support does cost money. So does paying for servers, apps, designers, and developers. Running a business costs money. But did you know it's cheaper to keep current customers than to get new ones? Gaining just one new customer can cost you up to ten times as much as any of your current customers do. You're paying ten times the cost of keeping a current customer just to get a new one.

Placing profits over customers leads companies to do stupid things like outsource their support or offer a very narrow set of ways to interact with the support team. Sure, sending your support calls and emails overseas gives you a chance to cut costs. But outsourcing often leads to more frustration for your customers because the company no longer owns that support. They've pushed that problem off on to an outside company rather than doing their own hiring and training. They've given support reps scripts and robotic replies in place of actual thought.

When your support team is truly part of your company, you take the time to hire the right people and make sure they're trained. It's a different mindset—one where the company has a greater sense of ownership over providing customer support.

From a profit standpoint, you want to keep your customers and keep them happy. Providing solid customer support does that. Customers will love you for doing the job right.

Need more proof? Check out these stats from Customers That Stick.

Think of the free marketing.

When customers love you, they're going to tell others about you. There's a reason I rave about Media Temple when people ask me about web hosting. Every single time I contact Media Temple, their support rocks my socks off. In return, I make sure to send every person I can their way.

Side note: Want to hear how Media Temple does it? Listen to my interview with them here.

At the end of the day, everything you do as a company is marketing, customer support included. Say you're looking at two identical products. Same cost, same functions, same in every way. You email one and receive an auto-responder promising a reply in 48 business hours. You email the other and you get a reply back from a human within a single hour. Which one wins your business? You'll pick the one better at support every time just like your potential customers will.

You've got to be better at customer support than the other teams behind products competing against yours. You've got to outsupport the other guy. It's not an option anymore. You have to make the shift from seeing support as a cost to seeing support as marketing.

Great support lets you keep customers at a cost way cheaper than getting new ones. Those same customers are going to bring you new customers because they love you.

What else do you gain by rocking at support?

You get better.

You can get an immediate glimpse into how customers are using your product. It allows you to see exactly what pains your customers are having, what confusion is happening, and where your product could be better. Customers want to help you, so listen when they share their thoughts with you.

Now, if one person emails you asking to tweak or add something, that doesn't mean it's a good idea. Someone might say they want you to add photos of penguins to your app. I'm all for cute penguins but they probably won't make your product better.

Your company should be customer inspired,
not customer driven.

Let's be clear—you can definitely learn from the crowd. That's what your customers are there for. To learn from. To be inspired by. To help.

If you get multiple people a day writing in about those penguins, that's the time when you might want to rethink it. Those changes that you need to make will bubble up from your customers.

Keeping track of the common requests and problems that pop up from customers will let you know what you need to be focused on. That way, you can improve pain points and make your product better.

Just a quick recap so far. When you provide an awesome customer support experience, you're going to save money, get free marketing out of it, and your product is going to get even better. I think that's a pretty solid case for doing support right.

Chapter 1

Set the Tone

SET THE TONE

PRESS START

You’ve got to start somewhere with customer support. From the first day you start thinking about support, you must be focused on setting the tone. This tone will carry through everything you do to help the customer be more awesome.

First, what does great support look like?

Great customer support comes down to three things: it’s got to be clear, concise, and fast.

Support teams bring clarity to confusing situations.

Support teams bring concise replies to complex problems.

Support teams bring fast answers to waiting customers.

When you focus on those three, a great customer experience flows naturally. The things that we’ll cover in this Support Kit will set you up to do that. Hiring the right person, picking the right support app, setting up the right channels for support; they all come together with those three things as the base.

Clear, concise, fast

That means your response to the customer focuses on short sentences. Here's what happened. Here's how I fixed it. Here's how to get back to me with any questions in the future. Everything is in simple, easy to understand language without any tech lingo.

That also means your emails are short. Our customers are busy, and we don't want to tie them up any longer than necessary. Don't write lengthy novels or include information they don't need. Instead, focus on communicating with them in the shortest period possible.

Now, this doesn't mean I rush a customer. I'm with them for as long as they need me to be. But when I do an online class, I keep to the scheduled thirty minutes. When I reply to a customer, I don't use any extra words. A customer's time is a valuable resource that I'm not going to waste.

There is an old phrase that goes, **"Slow is smooth. Smooth is fast."** Working with customers is similar. If you communicate clearly, you'll be concise. And if you're concise, you'll be fast.

It's that simple. Be clear, concise, and fast. That's the basis for a great customer experience. From that base, you can just keep building to make it even better. You can start adding things like online classes or live chat. You can start to send out surprise gifts to customers. That base provided a focus for making customers happy instead of just satisfied.

Happiness versus satisfaction

That's an important distinction—happiness versus satisfaction. I'm satisfied when I go into Walmart and buy a cheap item. But when I want to be happy during a grocery shopping trip, I go to Publix. I enjoy going to Publix, browsing the aisles, and talking with their staff. Walmart? That's just an in and out blitz because it's cheap and on the way home from work.

You want to leave customers happy at the end of every interaction with them.

Seth Godin had a great post on this:

> *The only purpose of 'customer service' is to change feelings. Not the facts, but the way your customer feels. The facts might be the price, or a return, or how long someone had to wait for service. Sometimes changing the facts is a shortcut to changing feelings, but not always, and changing the facts alone is not always sufficient anyway.*

A last note about tone via text interactions

The written word can be notoriously tricky for conveying tone.

In a typical conversation, we get about half of our cues from tone, inflection, and body language. The same sentence can be said two different ways with two totally different implications. I remember being at a store in the mall once and overhearing two girls shopping. "You'd look great in that!" was said on multiple occasions with two entirely different tones to convey if the girl would look great or if it looked horrible.

With emails, I don't have that luxury. It's only the words on the screen that I have to work with.

You have to nail every single word in an email.

The best example of this one is the idea behind "appreciate." We're bombarded every day with "customer appreciation," "We appreciate your business," etc. There's over nineteen million hits for that phrase on Google. That constant overuse leads many of us to be jaded with the word in any context.

However, I know people who I can genuinely use the word "appreciate" with. Just the other day, I had a friend look over an idea I had. Over a text chat, I said, "I really appreciate you sharing those ideas with me." I truly did appreciate it, and since we talk each day, I could convey that over text and not sound cheesy or insincere.

But over email with a customer I've never talked to before, I could never use that phrase. Believe me, I've tried and each time the customer let me know that it felt cheesy, like it was part of some script or automated reply.

So I dropped it in favor of just saying "thanks for …" Gone was the perceived robotic feel. In its place, customers pointed out that they felt it was more honest and open.

When you reply to an email, remember to choose your words carefully. Look for ways that a customer could read them incorrectly or interpret them differently. The cleaner and more concise you can get your reply, the better your conversation with that customer is going to be.

Chapter 2

Setting Up the Help Site

SETTING UP THE HELP SITE

You walk a fine line between answering your customers and running your company. Spend too much time with customers, your product suffers. Spend too much time on your product, you won't have any customers left. There's a balance between the two as you're starting in the realm of customer support.

Here's how it typically plays out.

- The customer emails you with a question about some feature.
- You type out a response and reply, which takes about five minutes.
- You and the customer both lost time during the whole thing.
- A few minutes later, you get another customer asking the same thing. The cycle repeats.

A solid help site and FAQ will help up to 40% of your customers find the answer without having to contact you. At five minutes a ticket, those numbers add up.

A customer's first stop should be your help site where they can find the answer themselves.

What should a good help site look like?

First, you need to decide on your terminology. It sounds like a minor point but deciding if you're going to call it a support site, a help site, a knowledge base, etc. will minimize the confusion for your customers. Keep it simple and just go with a general name like Help Site. It instantly conveys to customers what it's there to do.

After that, decide what the different areas will be. Some sites go with just a series of questions like Kickstarter. Others have tutorials and discussions highlighted like YNAB. Basecamp puts an emphasis on the guides to encourage exploration and learning.

For a solid help site, let's include at least these areas:

- Top FAQs that customers ask.
- Search page so that they can search for answers.
- Guides for the different areas of your product.
- Videos to explain different areas of your app visually.
- Contact page so they can ask for help if they can't find the answer.

What should a good help page look like?

When customers are on your help site, they're already confused and in need of help. Don't make it worse with a complicated page. Focus on three things:

1) Clean and simple

Keep the page design clean and simple. Make sure to include screenshots to illustrate what a customer should do. A complicated help page just makes things worse for a confused customer.

2) Short and sweet

Keep paragraphs short and sweet. Lengthy answers should be broken up in easy-to-read sections. Making something more clear does not mean adding more text to the page.

3) Headers and formatting

Use headers and text formatting to make it easier to read. Bolding the right word helps the customer find the answer faster.

What does a good screenshot look like?

Seems like a no brainer right? Take a screenshot of what you want to show and throw it up on your help page. Easy.

No.

You've taken care to craft every word on that page. Take the same pride and professionalism in your screenshots.

1) Frame and context

Make the object you're calling attention to obvious. But remember to include it in the context of the page itself. If you focus on just one tiny part, a customer might get confused trying to figure out where on the page you took that screenshot.

2) Use arrows, callouts, etc.

Use them sparingly. A dozen arrows in one screenshot is a tad too much. Highlight one to two things that you want the customer to see.

3) Don't forget the alt text tag

You're going to have people that rely on that alt text tag to "see" the screenshots. Screen-reading software needs the alt text to relay that information to a customer. It'll take a few moments to describe the screenshot but the customer that needs it will love you for it.

Help customers find the info first

You've got to have a solid search tool. No matter how organized things are or how clear cut your FAQs are, customers search for things first. We live in the days of Google search, not a book's index.

Put the search box prominently on the page. Customers should find it as soon as they land on the help site. If it's not readily there, they'll go ahead and send you a support case so you can do the heavy lifting and answer their question. By having the search box first, they'll use it first and find their answer without ever emailing you.

Want a good search tool that just plugs in? Check out Swiftype and Google Custom Search.

Let's look at other support channels.

Of course, your customers are going to reach out to you through other means, like through social media. And I really don't like that phrase but it's the best I've got to work with. I feel like it's becoming more ingrained in corporate speak with each passing day really. I was watching PBS's NewsHour and they offered to be "social media friends" with me on Facebook if I would just click Like on their page. When it shows up on PBS … Yeah …

Let's look at each one. I'm a pro/cons list kind of guy so that's how we'll break these down. They're in the order that I think you should focus on expanding into.

Twitter

Pros: 140 character limit means it's perfect for short questions and answers. For easy answers, a simple yes or no and a link to a help site works great. Your product/company is probably on Twitter already so just start answering questions there too.
Cons: 140 characters isn't enough for all questions. That's when you just send them your support email address so they can send you an email. Twitter's also a very public place where others can jump in on a thread. If it's a Tweet from an angry customer, it can explode into a public nightmare real quick.

Facebook

Pros: Lots of people use it already. It's easy for them to find your page and interact with you. There's no limit to the characters like Twitter so they can have longer conversations with you.
Cons: Similar to Twitter, it's a very public forum. If something goes wrong, it can become that publicity nightmare.

Live Chat

Pros: Customers love live chat. They can instantly interact with someone, almost like a phone conversation. When offered, customers jump to this channel. From the support side, it's nice that it eliminates back-and-forth email replies that can drag on for a day or more.

Cons: It's an interruption machine. Just when you get into your groove on something else, you'll get a popup from a customer wanting to chat. It's also people intensive. You can handle dozens of emails in a 10 minute span. With live chat, you can only juggle maybe three chats at once. That means to scale it, you have to bring in more support reps.

Community Forums

Pros: It helps take some of the support pressure off you. Customers can help other customers with questions. They can share ideas between themselves.

Cons: The pros only happen in a utopian world. It's equivalent to outsourcing your customer support to someone else. Customers aren't even getting paid to answer those questions from other customers. That means they don't have to worry about responding fast or in a clear way. You lose control of the support experience.

When you first start with a support team, **you're not going to be able to cover every possible support channel out there**. That's part of a lean customer support setup. And that's okay! But you do need to be paying attention and managing expectations.

> “*A brand not responding on Twitter is like hanging up the phone on customers. With millions watching. – Dave Kerpen*

Anywhere your customers are, you need to be listening. Even if you don't provide full support via Twitter, you need to watch for customers that reach out to you there. It's fine to redirect them by saying, "Hey, can you email us with that question?” It’s not fine to totally ignore them when they’re asking for help.

Set those expectations.

The last thing I’ll point out is setting expectations with your response times. I want you to say this next part with me.

It’s okay to take off holidays. It’s okay to have open hours.

In the world of out-supporting each other, many teams turn to a 24/7/365 support availability.

“See!” they cry. “We’re here all the time via email, phone, Twitter, Facebook, snail mail, LinkedIn, and that brand new app forum that just started yesterday. We’re here!”

You’re one person right now. It’s okay to set open/closed times.
I know you’ll want to jump in with the “But Chase, what about this situation?” You’re right – it’s not always possible. There are some businesses out there that need 24/7/365. If you’re in the hotel business, your customers need to be able to reach you at any time. If you’re in retail, don’t plan on taking off holidays.

Beyond that, aim for replying to customers as quickly as you can. If it takes you more than a few hours to get a reply back, you’ll want to consider hiring on another person to your team. But don’t kill yourself trying to do more than your team can.

At the end of the day, let work happen during work hours and go spend time with family and friends outside of that.

Examples of great support sites

- http://help.campaignmonitor.com/support
- http://basecamp.com/help
- http://wistia.com/doc
- http://bufferapp.com/faq
- http://en.support.wordpress.com/

Chapter 3

Interacting with Customers

INTERACTING WITH CUSTOMERS

RTD - Torrance Transit
Customer Service Center

You've heard the word "lean" thrown around a lot these days—lean startups, lean design. When you start out, you're going to want to run lean customer support. That means delivering the best possible customer experience within a limited set of resources.

Let's dig in on how to do that.

No fancy apps needed.

You don't need a fancy app to run support. A shared email inbox will do the trick just fine. Gmail's a popular option since it's free but you can use any email tool as long as it has the option for labels and filters with it.

When a customer emails you for help, replying to them is the obvious step. To help keep things organized, I'd go ahead and label that email with your name. That way, you'll know at a glance which messages were answered by which members of your team. Labels are also great for grouping together feature requests, bugs, or any other natural groupings that you come across.

When customers show you bugs (and it's going to happen), you can use shared to-do lists to track those. Each bug can be a separate to-do. Then you can assign it to that person and track who's working on it. Once it's fixed, check off the to-do and everyone knows what's happening.

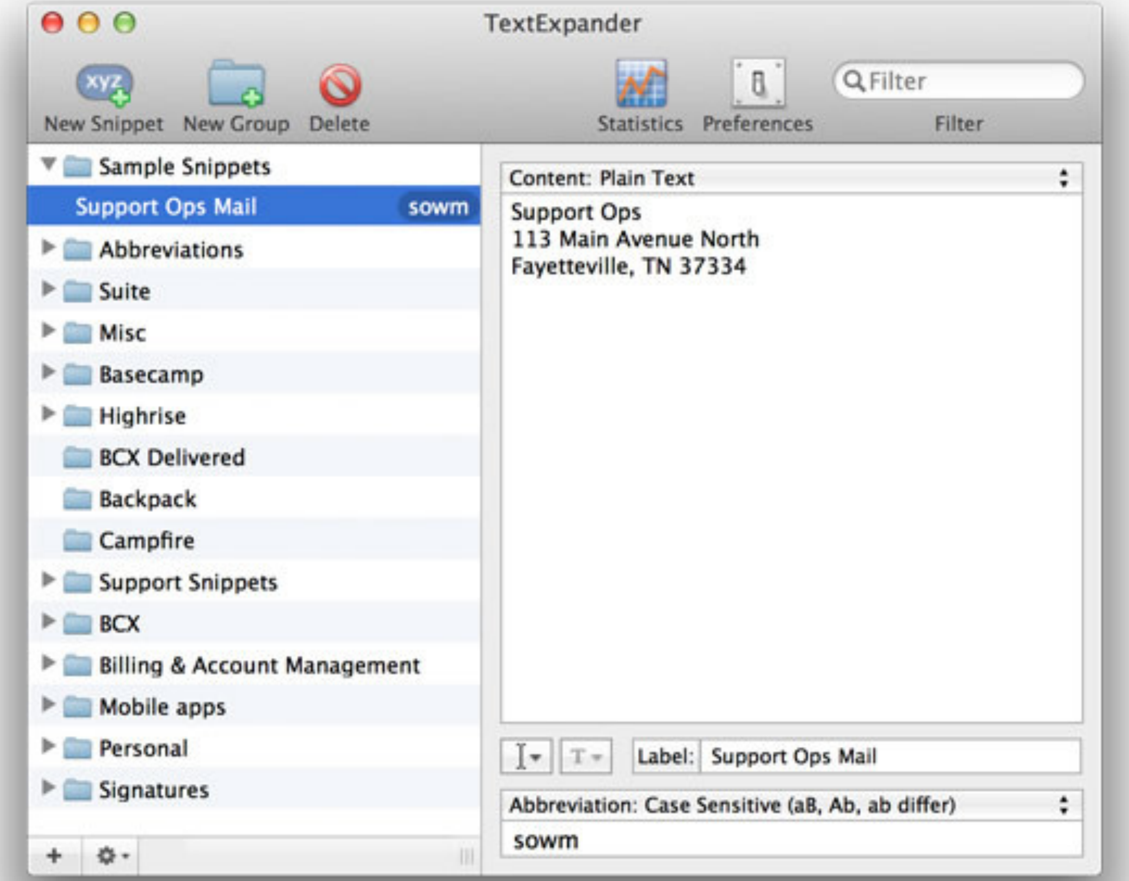
Between a shared email inbox and a to-do list, you can cover most of the customer support functions. You don't need to buy an expensive app to do these things in the beginning, especially since you're just starting with support and want to save some money.

TextExpander rocks.

It's easy to use and really affordable. TextExpander allows you to create "snippets," which are bits of text you can insert into an email with only a few keystrokes. It's easy to organize snippets into folders and extend them for all sorts of use cases.

When you start looking for a support app down the road, lots of people will try to push you on their special macro tool inside a support app. Don't focus on it. Keep using TextExpander. Your snippets aren't locked into your support app so you can always take them with you if you change. Plus, each person on your support team can customize them to their tone and writing style. You can go with other apps if you'd like, but for this one we'll be focusing on TextExpander.

Creating your first snippet


TextExpander
xyz
New Snippet
New Group
Delete
Statistics
Preferences
Filter
Filter
Sample Snippets
Support Ops Mail
sowm
Abbreviations
Suite
Misc
Basecamp
Highrise
BCX Delivered
Backpack
Campfire
Support Snippets
BCX
Billing & Account Management
Mobile apps
Personal
Signatures
+

Content: Plain Text

Support Ops
113 Main Avenue North
Fayetteville, TN 37334

Label: Support Ops Mail

Abbreviation: Case Sensitive (aB, Ab, ab differ)

sowm

You'll click on the "New Snippet" button in the top left. That'll give you the content area where you can put your snippet. Start with ones you use a lot like your signature, your contact info, and things along those lines. For me, you can see I've got my work address in there for this one.

Next up, give it a label. Something that's memorable so you know what it does when you're looking through a list of snippets. Then add the abbreviation for it at the bottom.

The abbreviation is critical. Too short and it's easy to trigger the snippet accidentally. Too long and you're not going to remember it. You want to be like Goldilocks and use something just right in the middle.

One other thing I like to point out with abbreviations is to use a key at the front that you don't typically use. In this case, I put "so" in front of my Support Ops snippets and then follow it up with something I can remember. "sowm" is for "Support Ops work mail".

Saving happens automatically with Text Expander. Open up a text doc and enter your new abbreviation. Remember, it's case sensitive so AB is different from aB. If your snippets appears, you're all set with your first snippet!

Pro Tip: *Include your working hours inside your signature. It'll help customers to know if you're online and when you'll be replying to them.*

Groups

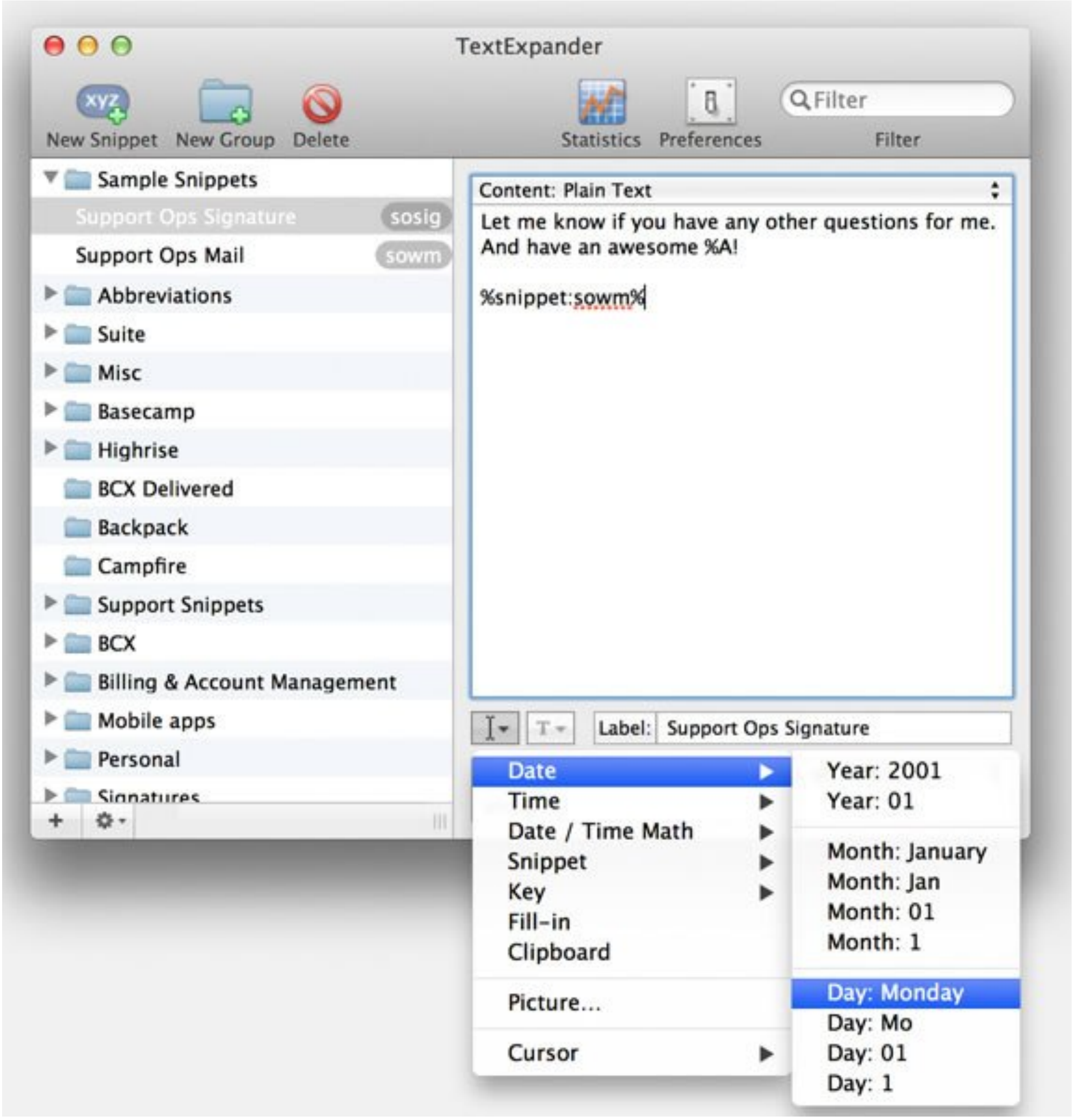
From that screenshot before, you'll see that I've gotten a ton of snippets. To keep them straight, I break them up into different groups. Creating a new group is as easy as creating a new snippet. Just click that button that says "New Groups".

I break mine up into groups around the apps I support. So you'll see Basecamp, Highrise, Campfire, etc. Those are all apps that we support at 37signals. Grouping them that way makes finding, managing, and updating them painless.

The other trick I use for grouping is within the abbreviation. At 37signals, I use "bcx" for the start of my Basecamp snippets and "hr" for Highrise to keep them straight in my head. So I might have a snippet called "hrmerge" to talk about merging inside Highrise.

Groups are your friend. Use them when you first start out to save the time and headache of setting them up after adding your 100th snippet.

Advanced snippets



TextExpander
New Snippet
New Group
Delete
Statistics
Preferences
Filter
Filter
Sample Snippets
Support Ops Signature
sosig
Support Ops Mail
sowm
Abbreviations
Suite
Misc
Basecamp
Highrise
BCX Delivered
Backpack
Campfire
Support Snippets
BCX
Billing & Account Management
Mobile apps
Personal
Signatures
Date
Time
Date / Time Math
Snippet
Key
Fill-in
Clipboard
Picture…
Cursor
Year: 2001
Year: 01
Month: January
Month: Jan
Month: 01
Month: 1
Day: Monday
Day: Mo
Day: 01
Day: 1

Content: Plain Text

Let me know if you have any other questions for me.
And have an awesome %A!

%snippet:sowm%

Label: Support Ops Signature

Your typical snippets are straightforward. Your signature, your contact info, etc. But what if you wanted to start on the road to true snippet mastery?

The next step would be auto-filling so you can convey some customization in your emails. Let's take an easy example.

That's my closing signature. See that %A at the end of the sentence? That's Text Expander's way of setting today's date.

To get that, click on the cursor icon to the left of the label line. You'll be given lots of different choices. We want "Date" and then "Day: Monday" Click that and you'll have that %A in your snippet content. Now when you type out that abbreviation, Text Expander will automatically put in today's name. Your customers will get that closing line with a hint of customization. You save time from having to type that out each time.

That cursor icon holds a ton of other auto-fills like this. I'll let you experiment with the others on your own since you know how they work now.

You can even have snippets inside of snippets! Cue the Inception soundtrack.

Pro Tip: *Want even more snippet examples? Check out my Brief Guide to a Better Email for examples of snippets I use every day.*

Sync your snippets

All these snippets won't help if they're not on the computers you use. Thankfully, the team behind Text Expander thought about that one. You'll have a way to sync them to other devices. Head over to the

Preferences pane and you'll see the Sync option there. No point in typing them out twice, right?
More info on syncing here.

Use a snippet app

Lots of support apps will have some sort of macro/snippet tool built into it. The reason why I don't use those is because your support app will probably be down at some point. Most online apps have downtime every now and then. Let's just prepare for the worst and say it'll happen to you.

When your support app goes down, you can at least still reply to emails directly in your email inbox. But all those snippets won't be available to you if they're locked up inside your support app.

Or what if you decide to change to a different support app? I bet those snippets won't transfer over.

Having a specific snippet app like Text Expander keeps you going if either of those things ever happens.

Easy as 1-2-3

And that's it! Nothing to fear when it comes to setting up your snippets. If you haven't yet, grab a copy of Text Expander and start using it today. It'll pay for itself the first time you blaze through all those Monday morning emails that used to take forever.

Some email tips and tricks.

To make sure you nail the email part, I want to leave you with a few tips and tricks that you can use for every email you write.

Customers love when you say, “Hi Bob!” rather than just a generic “Hello” or “Hi there.” Use their name whenever you can.

Make sure to say thanks for using your app. There’s usually a lot of choices out there and your customer has chosen you. At least say thanks and mean it.

You’ll want to talk like they do. Don’t use formal writing or words that you wouldn’t use in real life. Write like you would write to a friend.

Short simple sentences reign. Break up long paragraphs into readable ones. They’re reading an email, not a novel.

For feature requests, repeat their idea and relate to it if you can. This shows them that you actually read their email and didn’t just skip over it. If it’s one that’s intrigued you, go ahead and ask what they were thinking about when that idea happened. That’ll give you some context so you can relay that idea to the rest of your team.

If you can, tell them about new features in advance. It shows that your team is always working on your app.

And close your email on a highlight. “Happy Friday!” or another date specific line lets them know you’re writing the email on that day. If you see they have an auburn.edu email address, throw in a “War Eagle!” or other tidbit.

A few phrases you should never say.

“If you have any other problems, just let us know.”

This line usually ends up at the end of an email from a support rep. They should find a better way of ending an email instead of reminding me there will be other problems.

“We get lots of feature requests each day so we’re not able to respond to each one. But do know that we read each and every one of them.”

Yeah, right … they really read each and every email? I find that hard to believe.

“Thanks for your feedback.”

They don’t really mean it. And don’t use the word “feedback.” That’s what happens when you stick a microphone near a speaker. It’s a painful word that’s tainted by so many people using it and not meaning it.

“Your call is important to us.”

Another one they don’t mean.

“I apologize for any inconvenience caused by this.”

Say you’re sorry over this “inconvenience” BS. It’s just another bad sentence in the corporate lingo toolbox.

"There's nothing I can do."

There's always something. Even if it means helping your customer find another app that will help them do what they're looking to do. By doing nothing, you're just becoming the problem rather than helping to solve the problem.

"That's just how our policy works."

What you're really saying is that you don't care. Using this phrase permanently shuts down the conversation between you and the customer. When you say that, the customer just hears "I don't care—deal with it."

"I don't know."

Just because you don't know doesn't mean you can't find out. Your job is to help the customer. If that means you've got to do some digging to find out an answer, do it.

Chapter 4

Hiring Your Support Team

HIRING YOUR SUPPORT TEAM

In the beginning, you'll be able to handle customer emails by yourself. And you'll want to. You'll want to interact with customers every day so you can see what they think about your app.

But eventually it'll become too much. Customer emails will take up too much of your time. Time that could be spent on making your app better, faster, easier to use. You'll feel the strain as you ask yourself, "Can I wait on answering these emails so I can finish this design?"

That's when you want to make your first support hire.

A good rule of thumb is to hire when it hurts. That way, you're hiring to help with some of the load. The new support person will be able to tackle those customer interactions and free you up to keep making your app the best one out there.

It's pretty easy to hire a designer or a programmer. You know what their role already looks like. You've got in mind exactly what projects you want them to tackle. When it comes to your first support hire, it's a little different.

You know you'll want them to help customers. But what does that really mean? What does that look like?

The first support hire.

Your first support hire will need to be a jack of all trades and master of a few. At the very core, they need to be able to interact with customers. They'll be handling your emails, probably answering questions on Twitter, and taking care of fixing things for the customer.

They're also more than that, though.

This person will be your company's face. Every customer that talks with them will see and hear your company through them. They are in the role of spokesman for you.

It'll also work in the other direction. They'll speak for the customer to the rest of your team. You'll have them in the room when talking about new designs and new ideas. That way, a confusing design will be clarified. A buggy behavior will be fixed before it’s shipped. The best part is this will happen before the first customer ever uses the new feature or whatever you're working on. Your support rep will watch out for the customer every step of the way.

What should you look for?

Personality

They need a great personality to start. You want someone upbeat, cheerful, and always smiling. They need to be able to win over angry customers.A side note here—don’t feel that you have to always hire loud, boisterous people. The quiet guy in the corner could be a right fit too. This is just part of what you’re looking for in a great support rep.

Communication

They need to communicate clearly and concisely. Teaching grammar skills is the school’s job, not yours. Ask to see some writing samples before you hire them. If they have some sort of online blog or website, check it out to get a feel for their writing style. For the in-person interview, role play a few customer interactions to see how well they can talk with customers.

Creativity

Every customer you have is unique and every trouble they find themselves in is different. You don’t want to set a bunch of rules and regulations when it comes to customers. When you have a rep that’s creative, they’ll use their best judgement to figure out how to make the customer happy.

Creative reps go out of their way to help customers and even do crazy things like send a box of chocolate to make up for a customer’s bad day. I remember having a customer once whose boss was being horrible to her for his mistake. She was just trying to fix it. After we got it fixed, I sent her a box of chocolate-dipped strawberries. She got them the following day and absolutely loved them. It didn't erase how bad the boss was, but it definitely made her day.

Self-motivated

There are lots of things wrapped up in this one. You want someone driven, able to work on their own, and such. You've got customers to help—you don't want to have to babysit one of your team members at the same time. To find this one, find out about personal projects that they lead or run. If they're raising money for a local charity in their off-time, they're probably able to be their own boss.

Culture

You want someone that's a good fit for your team and company culture. When you do the interview, take them out for a meal with the rest of your team. See if they naturally fit in or if it's a forced relationship. There's no reason to try to push a square block into a round hole. Notice these are all qualities called soft skills. These are really things that the person either has or doesn't. Compare that to hard skills like typing, being able to use a computer, knowing how HTML coding works. Hard skills can always be taught. I can teach anyone how to reply to an email. I can't teach them how to empathize with a customer. Hire for soft skills—train for hard skills.

Putting together the opening.

Now that you know what kind of person we're looking for, put together a job opening on your website.That'll give you a central link to advertise, pass out to others, and so on. It should be short, descriptive, and fun. But what should we put in it?You'll want to tell people what their typical day would be like. Give examples of the emails they'll be answering. If a little bit of HTML knowledge or programming abilities would be helpful, put that in there.

But make sure you let people know that you're really looking for one thing: someone who loves to help others. Remember, hire for soft skills—train for hard skills.

You'll also want to say that this isn't your typical customer service kinda job. There are a ton of customer related jobs out there, most so boring you'll wish that you never heard of the company let alone applied for a job with them. So you need to let people know that the customer experience you want to provide is different. One based on trusting them to do the right thing for the customer.Take a look at some of the other job postings from teams that you think are doing a great job. Then make sure to check out the jobs page I have at Support Ops, too. Once you start combing through the applications, you'll see a few standouts. These are the people you want to get to know better. To do that, I'd take them through three steps.

1) Give them a call.

Just call them up. See how well they can have a conversation with you. Talk about their background, current job, favorite sports teams, anything that will let you have a conversation. Helping customers is all about having a natural conversation with them. If they can't do that with you, there's no way they can do it with your customers.

2) Bring them in.

Meet them live and in-person. Give them a tour of the office and introduce them to some of the team. See how they interact with a person on first meeting them. It'll give you more time to observe how they talk with people. Do they overpower the conversation or do they listen to the other person more? Do they just say anything that comes into their thoughts or do they think about the words they use?

Watching and listening to a person talk will tell you a lot about how they'll treat your customers.

While you have them here, have them answer a few support cases. That'll give them a chance to see what a typical case would be like. It'll also give you a chance to see how they can write an email, figure out a problem, and explain things to a customer.

3) Take them to dinner with the team.

After the day's over, take them out to dinner. It's all about spending some time with them and watching how they interact with others. Do they treat your server well or are they bossy with them?

Bring your team along so they can feel out the new person as well. These are the people who'll be working alongside the person you pick, so they deserve some input too.

Then make your pick. You've got all the information at your fingertips. It's just a matter of saying yes to the right person.

As the team grows.

As you keep adding more support reps to your team, you're going to need some leadership for them. Let's talk about some ideas for how leadership should go with your team. I've seen a variety of methods from the classroom, restaurants, and of course the 37signals support team. Here are some of the best ideas I've seen in action.

Have a Team Lead

No matter how small or large your team is, they need a team leader. This is the person that help speaks to the rest of your company. They represent the support team to the others on your leadership team. The more people involved, the more that role is needed.

So the first step is to designate that as a role. Lay out some of their responsibilities. For us, the team lead backs off of answering support cases so they can work on other things.

A few things they might focus on:

- It might be helping to layout FAQs and such for a new product.
- If you hire a new person, they serve as the primary trainer.
- They send out cards and gifts to customers.
- They write up the weekly summary of what's going on in the world of support. We call it our heartbeat.
- One-on-one reviews and random case spot-checks are great for this person to work on.

As the team grows, you can add more things there of course.

What's in a Name?

What you call this role doesn't really matter. Really, I'm hesitant to include the word "leader" in any title. It conveys an image of only certain types of people as leaders.

In truth, anyone can be part of this role. And they should be. So you might call them a team rep like WordPress. Or section chief. I worked with one guy that had the lead that day called XO, short for executive officer. Despite obviously pulling it from his Navy days, he liked it because he wanted the lead to focus on executing and acting in that role. No one likes a lead that just sits around.

Keep it Fresh

One of the things that I love with this role is to keep it fresh with different people rotating in and out. This gives us a few key benefits.

- They don't get burnout. Having a person do the same thing all day gets monotonous quick. This role is great for bringing someone in to give them some variety to their life.
- They don't get egotistical. You're a lot nicer to teammates if you're not going to be the team lead in a few weeks. There's not an employee vs. management mentality if people are freely moving between those two levels.
- They don't hoard knowledge. If you only had one team lead, firing them would let a lot of info and ideas walk out with them. By sharing it, the entire team grows as people grow into that role and then pass it on to the next person in line for it.
- They don't politicize the role. I'm hesitant about people voting for their reps. We've seen how well that works with elected officials. Instead, have everyone interested in it take a turn. Remember, you want to grow the entire team, not just specific people on it.

I've seen this role shift on a weekly, monthly, and biannual time frame. Personally, I wouldn't recommend anything longer than six months. That's a long time in this role. Finding that sweet spot is something your team will want to work out. Try a few different time frames and see how it goes.

Of Course There's a Caveat

Let me end by saying while I love having this rotating role, it's not for everyone. Some teams need a permanent spot. That's what works for their team, and that's great.

But I highly recommend trying it. Every team I've been part of that used this approach has had a lot of success with it.

Chapter 5

Picking the Right Support App

PICKING THE RIGHT SUPPORT APP

Let's talk about picking the right tools for your team. It's a big choice when it comes to delivering a great experience to your customers. If you aren't happy using an app, it's going to come across in your interactions with customers.

You don't need a fancy app to run support. A shared email inbox will do the trick just fine when you're starting out.

But your support team is going to grow as your customer base increases. Once you get a few members on your team working in that shared inbox, it'll be time to move up to an app designed to do customer support.

Where to even start?

There are a ton of apps out there that call themselves "support apps. I could talk about my favorites like HelpScout, UserVoice, HelpSpot, and even Desk. But the truth is this: every team needs a different fit. Your team won't be like my team which won't be like the other support team over there. You're going to have to do some testing. That's why they give you free trials before you have to pay for anything.

Side note: Check my reviews of different support apps here.

When you're looking for an app, keep a few things in mind.

You want something fast.
There's no reason to be waiting around for cases to load. The faster the app is, the faster you can help customers.

You want something that matches what your team needs.
Don't use Facebook as a support channel? Then don't get an app that focuses on that. One thing I love about HelpScout is that they focus on being the best email support app out there. They're a great fit for people that just do email support. But if you're looking for a support app that you can install on your own server, HelpSpot is great for that.

Your needs are unique, so make sure to match them up with what the app offers.

You want something easy to use.
There's no reason to have a complicated app. It'll end up being more frustration than it's worth. Seriously, go out and try a complex app like Salesforce. You'll come running back to those simple apps in a heartbeat.

Finally, you want something your team likes to use.
If your support rep doesn't like it, they won't use it. Simple as that.

Chapter 6

Dealing With a Crisis With Your New Support Setup

DEALING WITH A CRISIS WITH YOUR NEW SETUP

With your new support setup in place, let's talk about what you should do when your app crashes. It'll happen. No matter how good your team is, it's inevitable.

To set the mood, let's talk about the typical downtime event.

Everything's humming along fine. Birds are singing. You just grabbed that second cup of coffee. Then you get a message in your chatroom from the sys ops guys.

> "*One alert just came up on a server. I'm taking a look at it now to see what's going on.*

The first line of defense before anything else is on your sys ops team. You've got to have some sort of early warning alerts. You don't want to be caught entirely off guard with a customer's email being the first thing to tell you your app is down.

Work with your sys ops team to make sure they have some early warning detection in place. The more lead time they can give you to get your plan rolling, the better.

Back to your coffee, you see this message:

> “*Something's up with that server plus another one. Go ahead and be ready in case the app goes down at some point in the next few minutes.*

That's when you kick in your downtime plan. It's not the time to create or practice it because by this point it's too late.

Let's break from this downtime to talk about that plan. I'm going to cover three areas: 1) Create a plan, 2) Practice that plan, and 3) Execute that plan.

Create a Plan

Your plan can be formatted to fit your team and how you work with each other. I'm going to talk about a general plan that can easily be adapted as needed. It's based on what I've learned during the downtimes we've had at 37signals.

As soon as you get those early warnings, designate someone as the lead role for support. We call them the incident commander, or IC for short. They work with the Ops IC to coordinate what's going on.

The support IC designates a support person for each of the incoming support channels. One person's on emails. Have them bulk reply to customers with links to your status and Twitter pages. One person's on Twitter. If you're running a support phone number, you'll want to have someone lead that effort and make sure anyone answering the phones replies with the same message and updates. The IC doesn't reply to tweets or emails. They work to make sure that each channel is covered and has the most recent updates.

You need to have a status page for your app, too. Have the Support IC update that. When they update that status page, it's a good time to send the update to the rest of the team so they know what to communicate to customers.

Need to set up a status page? Check out statuspage.io.

Make sure to direct people over to your status page or to Twitter for updates. It's easier to provide a stream of updates to your customers than to tell every single one of them the same thing over and over.

Updates go out every 10 minutes at minimum.

There's nothing worse than an app being down with no one from the team responding. Clear and constant communication goes a long way with your customers.
Everything's jiving and your team is responding. The Ops IC just let you know that the app is back up. But wait! Don't post the all clear just yet.

Give it five more minutes. I've been burned before where the app comes back up only to go down again. Customers hate feeling like they're on a roller coaster ride unless they're at an amusement park.

Wait for a few minutes to make sure the app stays up before posting the all clear.

Now the app's back up and life is peachy again. Have the Support IC work up a blog post on what happened. Your customers want to know that you know exactly what happened and more importantly, how you're going to prevent it from happening again. Be honest and give your customers as much info as you can. Just make sure that it's clear and concise without a bunch of tech lingo.

Practice the Plan

With your plan now in hand, you've got to practice it. That means drill, drill, drill. Obviously, don't take down your app just to practice. But have some mock scenarios worked up so that your team can practice. Set up a separate chat room so that you can fake your app going down and feed info to the ICs there. In the middle of the day, throw out a "This is a drill line" into your support room and then have them designate roles. Help people get a feel for what a real downtime situation is like.

For the first time, you're going to want to walk through the plan slowly. Get a few key players in to test it out. Going slowly through the first drill will let you see what works, what doesn't, and what needs to be changed.

Once you've got the kinks ironed out, go faster. Downtime is all about a fast response where faster always equals better. The faster your key team can work, the faster the downtime clock stops.

And when you've got speed on your side, rotate other people into those key IC roles to give them a chance to grow. If the app goes down on your off day, you've got to have a backup person trained well enough to handle it.

Again, drill, drill, and drill some more. I remember watching Last Resort, a TV show that focuses on a submarine crew. The captain had just finished a drill and said something that stuck with me. He said,

"We don't drill to be good. We drill to be perfect."

Execute the Plan

So we've got a downtime plan and we've practiced that plan to the point that we can do it in our sleep. Let's go back to our coffee from earlier.

There you are, just settling in, and you get an Ops message with some early warning alerts going off. The hard part's really behind you now since you know exactly what to do. Just execute on the plan.

Set up your ICs and have them designate roles. Then you get to watch as the team kicks in and gets the word out to customers. Remember, your role as the IC is to coordinate, not to answer emails or get bogged down in one area. Stay flexible and watch the big picture.

The biggest thing during the downtime is to focus on one question:

"Do my customers have the most up-to-date info?"

Don't leave them in the dark. Remember, updates every ten minutes at the very latest. During these downtime events, knowledge is everything, so share the wealth with your customers. They'll feel better when they see those updates. Even if it's just, "We're still looking into it," tell them. Communicate, communicate, communicate. Your response here sets the tone for the overall downtime.

When the Ops IC gives you the all clear and you've waited an extra five minutes, post the all clear. Then go back and get another cup of coffee.

After the Downtime

You'll also want to review your downtime plan itself.
Did it work? Where did we run into confusion? What kinks do we need to iron out?

In military terms, it's called an AAR—an after-action review. Get your key players on a call and find out three things:

- What exactly happened
- Why it happened
- How it can be prevented and handled better next time

Your team and your app are going to get better from these downtime events. But they'll only get better if you review them.

Chapter 7

Don’t Forget the Customer

DON'T FORGET THE CUSTOMER

In the midst of setting all this up, it's easy to forget about saying thanks. The big thing to remember here is to be sincere and relevant. If you notice a customer is a big gamer, it's cool to send them a PacMan lamp. It's not cool to send them a cheesy gift card to some random place. Here are a few ways thank your customers.

Send a Card

Super easy. You probably already got their address when they signed up. Send them a simple thank you card. Customers will love that you took time to send a handwritten note rather than just a generic email. Try doing the Thank You Card Challenge this month. Have everyone on your team send one card a day to a customer. If even a few people on your team do this, it'll make a huge impact with your customers.

Send a Gift

With customers that I work with a lot, I often know their interests and hobbies. So if their NFL team wins a big game, I'll send them a shirt or

something featuring that football team. There was one customer who was brewing his own beer so we sent some beer mugs to him.
This works just like the thank you card except that it requires a little more time and effort. But the payoffs are still big. We get emails with customers showing their gifts and how much they love them.

Teach New Things

There's a local farmer that gives tours of his farm to customers. They get to see where he grows their food and how he does it. He then teaches them the best ways to cook with those fruits and vegetables at home. Customers love the openness and keep coming back to learn more from him.

If your product is hosting videos online, teach customers how to make better videos. The more movies they make, the more they'll host with you.

Make a Video

If you want to send something more virtual, at least make it a video. You could gather up your team and just say "Thanks!" really loudly as a group. Customers will appreciate that more than just an email that was blasted out to everyone.

Give Them Some Money (In the Right Way)

Who doesn't love free upgrades or discounts? This is the one time I'd allow an email to be sent. You could let them know that you've added a free month to their account just to say thanks. Customers love getting free money and it helps their business too.

Throw Them a Party

Rent out a big room at the local bar for a night. Hold a summer barbecue. Invite all the customers in a city to attend. Then go to another city and repeat.

Customers love getting to meet you in person. And who doesn’t love free food?

Chapter 8

Wrapping Up

WRAPPING UP

It’s easy to be bad at support. So incredibly easy.

Companies excel bad support all the time. Just call up your average bank or retailer. You’ll be sitting on hold for hours. Your email won’t get a reply for days.

Why not be the one that gets it right?

After reading this guide, you’ve got the tools and the knowledge. Now go out and create an awesome customer support experience to go along with your awesome new product.

Go back to that room from earlier. If you walk in doing support the right way, you’ll be a breath of fresh air to those frustrated people. Walk on in and bring a little humanity back to the world of customer support.

ONE LAST QUICK NOTE

This guide is the culmination of months of work, interviews, experience, and more. I just want to say thanks to all the people that I've worked with to make it happen.

Most importantly, I want to say thanks to you! We need more awesome people like you working to bring some humanity back to the world of customer support.

If you're looking for even more great articles and resources on customer support, make sure to check out my site Support Ops at http://supportops.co.

Thanks again and now go be an awesome customer support pro!

- Chase