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When Customer Service Goes From Bad to Worse

– David Taber, CIO

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This article is the fourth in a series of excerpts from the second edition of David Taber's Salesforce.com Secrets of Success*, which is scheduled to be released later this year. This installment examines what happens customer onboarding goes off the rails.*

This real-life customer service example comes from the cable TV industry, which is famous for dysfunctional customer support that's exposed in its purest form where it really counts: Right after a customer signs up. Since this situation has been true for years, it appears to have been an intentional choice.

For clues, just read Dilbert for a few weeks. Since most cable operators grew by acquisition, their IT systems are a crazy-quilt of partially integrated systems that would cost a fortune to really fix. As the cable companies face lots of competition and customer churn, they feel compelled to offer lots of new services and limited-time offers before the operational systems are ready to support them.

Our focus here is the downstream area. Let's look at the CRM and customer support issues that stem from a "vanilla" service install order. Every step of the process offers a look at how poorly integrated systems quickly make customer service go from bad to worse.

Website: Lipstick on the Pig

The initial order was made on the company website, which was snazzy and reassuring as it took the order and scheduled the installation visit. Minutes later, another system automatically sends a confirmation email, and it was clear that the installation visit time-slot needed to be changed.

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That email includes a link that says, "Click here to change the appointment time." That link brings the user to a website registration wizard, which indicates that a new user account has to be set up. That wizard can't be completed, but it also won't present an error message. The user tries three separate browsers and gets same no-go, no-error condition all three times. From there, the website offers the option to "Chat with a support agent."

Customer Chat: Assuming Lowest Common Denominator

Since this is a website problem, the chat-agent approach seems to be a reasonable approach. But at the start of the chat session, there's no self-categorization or other self-selection for the customer, so the chat workload is an undifferentiated mass. The chat agent pool must assume lowest common denominator—and that means the chat agent can't be very good.

In this instance, not only is the chat agent trying to service probably 20 concurrent sessions, she had poor English language skills, no real knowledge of the business process and no access to the system the user's interacting with. Bad choices in the customer service department caused every one of those issues, each the result of an effort to look "with it" and keep costs down.

Net result: No progress. Process wastes one hour of IM chat agent time and one hour of customer time. So the customer grabs his phone.

Phone Support: More Lipstick, Same Pig

After 30 minutes on the phone with a competent customer service rep, the user learns he can't set up a new account on the website to change his service appointment time because—wait for it—the service appointment hadn't happened yet. You see, you can't set up an account in the system when you haven't been provisioned yet. The "helpful" email confirming the appointment had obviously never been tested against the way the website actually works.

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Root causes: Incomplete integration of ecommerce, operations and marketing automation systems; CRM users unable to see all systems involved with the business process; weak design of agent chat business process.

Net result: Burns 90 minutes of customer service rep and customer time.

Order Signoff and Acceptance of Terms: 3 Days on the Phone

A couple days before the service appointment time, another system generated an email to confirm the order and accept the terms and conditions. But the order had two errors that had not appeared on the previous confirmation email, so the customer grabs the phone again to fix the service address and the ordered items.

Such a fix requires the customer service rep to log into three separate systems. The rep can't figure out how to reissue the corrected email for order confirmation and acceptance of terms but assures the customer that the corrected email will be sent in the nightly batch.

Of course, no new email came—and without signing off on the confirmation, no truck would come, either. The Web page for the order confirmation was *still* wrong.

On the phone for a second day, the service rep fixes the order but, again, can't see all the systems involved with the business process. The rep also mentions that the company needs to send a field agent for a site survey in advance of the real service appointment, which hadn't been mentioned at any earlier step of the process. The rep reissues the confirmation mail but, again, nothing changes.

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On the phone for a third day, the service rep fixes the order yet again. The customer decides to do the order confirmation and acceptance of terms a different way, using the phone system and an interactive voice response (IVR). That appears to work.

Root causes: Incomplete integration of operations, sales order processing and marketing automation systems; CRM users not able to see all systems involved with the business process.

Net result: Takes up two hours and 40 minutes of service rep and customer time

Site Inspections: A 60-Second Glimmer of Hope

The first field tech site inspection occurs on schedule, indicating that internal systems talk to each other a little bit. He worked for the cable company, too, which is a good sign, but the inspection lasted all of 60 seconds. The field tech neither inspected the site nor talked with anyone and just drove away. Guess it's an easy install.

The second field tech visit occurs on schedule, but this time it's a contractor. He doesn't have the correct address, the correct hardware or the authorization to pull the cable in conduit. In other words, all previous order corrections and site visits were ineffective. After several phone calls, enough expedites and escalations are done so the contractor's allowed to perform the work on the original order.

Root Causes: Incomplete integration of operations and field-tech outsourcing systems.

Net result: About an hour of various service reps' time burned.

Service Activation: What's This Shovelware?

After hardware install, the service requires software setup. The customer must set up a user account and go through some service portal wizards. One step says, "You need to install this package on your PC," but it fails to show what the package contents are, indicate what alternatives are available or provide a link to uninstall instructions. Customer's machine gets several unanticipated—and mainly frivolous—changes.

Commentary: Go Beyond the Survey to Learn More About Your Customers

Root Causes: Marketing and support are cute with "added value" but pay little heed to desires of power users.

Net result: More calls to customer support to remove shovelware.

The Bottom Line: Bad Systems Waste Everyone's Time

This customer order was a promotional special, so it presumably offered less profit than normal service. But the cost to the cable company was more than that, as this single order wasted six hours of service rep time, as well as one service visit that was little more than a "truck roll." All because of false economies in integration, business process work and usability testing.

The indirect cost on top of it all was one irate customer. The onboarding processes contained so many break points that customer diligence, not company follow-through, was the only way to actually complete the order. Wasting customer's time might be acceptable for a bleeding-edge product, but it's absurd for support of a commodity service such as basic residential cable with ISP access.

David Taber is the author of the Prentice Hall book, "Salesforce.com Secrets of Success" and is the CEO of SalesLogistix, a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel and India. Taber has more than 25 years of experience in high tech, including 10 years at the VP level or above.

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