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Top 10 CRM Tricks Guaranteed to Lose Customers

– David Taber, CIO

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There's a ton of evidence supporting the business value of great customer support. It's not just a matter of happy customers and loyalty—a solid customer base can make a real difference to profitability and even stock price.

However, that's not to say you should [overinvest in CRM technology](#) for customer support and service. The technology alone doesn't make for happy customers. The devil is in the details—and if those details aren't done just right, you end up with unhappy campers.

As with marketing, much of the [success of customer service](#) depends upon subtlety and nuance. Here, then, is my top 10 list of customer support tricks that only end up corrupting customer satisfaction.

10: Set Up Really Deep IVR Navigation Trees

Life is complicated. So are the support functions of big businesses. Why not just expose all that organizational complexity directly to the customer? While you're at it, make sure to use internal jargon in the interactive voice response audio prompts. The customer will know exactly what you mean, and he won't forget the third option after listening to nine of them. Bonus points if you make it so customers can't jump back up the tree if they select the wrong option.

9: Make the Leaf Node of Your Navigation Tree a Line to Nowhere

After making users trudge through a Byzantine navigation tree and sit in the hold queue, connect them to a busy signal or voicemail box that's always full when their call has been addressed in the order that it was received. Instant insanity.

8: Go Purely Single Channel for Customer Support and Service

It may sound like a great idea to have customers go through the phone, the Web portal or email with equal ease, but wouldn't it be better to have *everyone* go through exactly the same channel, to ensure uniformity of service and the ultimate in measurability? Well, sure, as long as that one channel doesn't fail...and as long as the user likes using only that channel...and as long as you're not trying to get to a wide range of customers. This one is a pure loss.

Case Study: [How Citibank Uses Twitter to Improve Customer Service](#)

7: Use a Low-Quality Phone Line

Once you've spent all that money on ICDs, IVRs, predictive dialers and CRM, you're going to need to economize somewhere. I know: Let's use low-grade VoIP service and an overloaded router. The

customer won't notice.

6: Publish Too Many Documents

As Frasier Crane said on his TV show, "If less is more, imagine how much better more would be." Publishing more documentation is easy to measure, so it's easier to nail the departmental bonus. Sure, it might be better to create a small number of documents that really matter and that are oriented to the perspective of the user's likely problems. But that's harder, more expensive and can require more subtlety of measurement. That's no good. So let's go back to the high-volume, low-quality approach that we know so well.

5: Use a Crummy Knowledge Base Search Engine

If you have a lot of documents, you're sure to want a search engine that exposes them all to the customer. Look at all the stuff we've found for you—it's mostly useless drivel, if not misleading and outdated, but just look at it all! Much better to do this than to have the search engine say, "Sorry, we can't find anything useful for you." That would be depressing for the [pointy-haired boss](#).

4: Hide the Can Opener Inside the Can

You've got the greatest content and a really strong correlation engine to serve up just what that customer needs. Even though this is just help for a toaster oven, you're going to lock all that content behind a registration wall so Google can't see it. That way, users don't understand why they should go through a ridiculous registration process to find out how to clean the crumbs out of their toaster.

Analysis: [Why Customer Experience Management Is the Next Step in Interaction](#)

3: Don't Perform Usability Testing With an Outsider

Now you've set up a sophisticated application with an AI-driven knowledge base and a terrific customer self-service portal—all on schedule and on budget, and all because you skipped the part about testing with real, outside users. It's OK, though, since all the guys from the Indian call center ran through the test scripts, and they all said it came out fine. You've proven that your own people can navigate the system that they designed. What could be better?

2: Set Up a Ticket Echo Chamber

We all know how ticketing and case management systems are supposed to work, and we want the user to be able to check the status and make updates from email and the Web. While you're at it, throw in instant messaging and paper airplanes. Too bad you made it so that, whenever somebody responds in one medium, it creates a new ticket for the other media. Every time somebody makes an update anywhere, they are daisy-chaining the creation of yet another ticket in an endless loop. Boy, look how high our ticket-close rate is getting!

1: Overzealous, Obtrusive License Enforcement

You have intellectual property to protect, so make sure that nobody ever gets access unless you know they've paid for it. This type of great customer service is best served up as denial of service when your company's license server is down.

How-To: [5 Things CIOs Need to Know About Customer Experience](#)

Why not go the extra mile to annoy your customers? Behave like the image library companies whose clever algorithms look for their images on websites. As soon as they find one, their "customer service" teams use a guilty-until-proven innocent tactic, including a fine and threat of legal action. Best of all, there's no mechanism for the website owner to validate that the images that some contractor put up on their website have been licensed. It's "pay us or see us in court." Now *that's* customer service!

The bottom line here is simple. When putting in a highly automated customer support system, pay serious attention to the business rules you're mechanically enforcing. "Soft issues" and usability problems can set customer satisfaction back a long way.

David Taber is the author of the new 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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