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Salesforce.com: What the Customer Support VP Needs to Know After Rollout

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Customer support VPs may have to manage a range of customer-facing functions such as order-taking, shipment expediting, installation and field service appointments, as well as technical or warranty support. Each of these functions should have direct access to the CRM system, but the specific information needed (and transactions performed) are quite different across these CS roles.

If you're using SFDC, what decisions will you have to make? How should you measure success? Here are some customer support executive guidelines for the first few months of system usage. While much of this article applies to any modern CRM system, we've focused here on the specifics of salesforce.com.

Salesforce.com: What Sales and Marketing VPs Need to Know After Rollout

Did you miss the previous articles in this series exploring what sales and marketing VPs need to know to make a new Salesforce.com or CRM rollout succeed for the business? Check out the sales VP and marketing VP advice.

Integration is a key success factor

Unlike traditional call center packages that "grew out of" advanced telephony gear (PBXs, ACDs, etc.), salesforce.com was not designed to center on telephone conversations. Indeed, many of their customers use web, e-mail, and IM extensively for customer support interactions. So if your CS operation is highly dependent on the phone, job one will be obtaining an App Exchange CTI plug-in for your telephony system. Fortunately, there are several of these available (and some are free). Evaluate the plug-ins for their depth of integration and the amount of data they automatically insert into SFDC records with each call. The larger and more distributed your call center, the more you'll appreciate the automation provided by the better CTI plug-ins.

Depending on the function of your customer support reps (CSRs), they'll need access to information that's outside the purview of SFDC. You will need to access the Force.com platform APIs to facilitate integration with external systems such as:

• Information integrated from your order management system: current orders, pending fulfillments, etc.

• Information integrated from eCommerce: "shopping cart" status, order details, and credit-card payment status
• Information integrated from the accounting system: order history, invoices, and payments
• Information integrated from the manufacturing/ERP system: shipments, serial numbers, inventory, backlog, parts availability, return merchandise authorization (RMA) numbers, reverse-logistics information, and warranty information
• Information integrated from engineering: defect reporting/tracking, resolutions, technical bulletins, patches, licenses, and repair/rework status

As most of these data elements don't change very often, you can probably get away with a periodic batch update in most cases. However, probably 10 percent of the data changes frequently, so some real-time integration will be required. While SFDC's APIs and 3rd-party integration connectors fully support closed-loop integration, there are implementation and maintenance costs involved. The depth of integration you use (including, for example, providing a login frame to external systems within an SFDC tab) is really a business decision, and most of our clients choose their integration approach on a screen-by-screen basis.

Customer Self-Service is King

It's ironic that in some industries, a well-executed customer self-service portal can achieve higher customer satisfaction scores than "more people on the phone." While this may not make CS professionals feel all warm and fuzzy, the cost savings and time efficiencies cannot be ignored.

A well-executed customer portal lowers the company's costs, gives customers 24 × 365 access to the information they need, and reduces the error rate associated with support information. Ideally, the portal should include access to the following information:

• Customer name, address, phone, and account information (including user preferences such as language and currency)
• Order history, invoices, and shipment history.
• Warranty information and support entitlements.
• Licenses or serial numbers.
• Frequently asked questions (FAQs).
• Product documentation and manuals.
• Solutions and a knowledge base with really good categorization and full search capabilities.
• IM-with-a-support-person or chat bots.
• Case (problem) submittal, tracking, and updates.
• Support contract renewals or warranty extensions.
• Ordering information for accessories, parts, and upgrades.
• Training and certification options.
• Salesforce.com's Ideas application, which provides a great way to capture and prioritize customer suggestions.
• Survey/feedback center.

SFDC's Customer Self Service portal (part of their Service Cloud offering) is a great foundation for this, but it can't just be a "click and run" proposition. You need to spend some time to really integrate it into the rest of your website and your business processes. It's critical that you get customers directly involved to test and refine portal usability. Skimp on this step, and you'll miss a huge opportunity for improving customer satisfaction at virtually zero incremental cost.

Although high-tech customers become very comfortable interacting with portals, *do not implement a self-service portal as a "slash cut"* that removes phone support. Introduce the idea gradually, letting customers naturally drift over to the customer self-service portal. As more of the support volume shifts to the portal, you'll get suggestions for refinements to make it even easier and faster for customers (and in the long run, cheaper for you). Once 80 percent of your "call volume" is handled through the portal, you can provide some incentives (such as lower costs or better service levels) to cement the customer behavior.

Measure the Right Things

Installing CRM system across all your CS functions provides a range of measurement capabilities that can be overwhelming. Don't let yourself get caught in information overload, or worse, detail that leads to micromanaging behavior.

With the right App Exchange plug-ins for system integration, reporting, and dashboards, you can focus on the things that measure customer *satisfaction* and loyalty the things that really matter to the business:

• Number or value of customer problems handled per CSR per day.
• Average wait time, call queue depth, and response time.
• Average number of calls or time required to resolve a customer's issue.
• SLA compliance percentage.
• Top 10 problem categories each week.
• Top 10 customer complaints or escalations each week.
• Customer satisfaction percentage.
• Customer loyalty and willingness to recommend.

Focus on measuring the customer experience and how that effects their satisfaction. Extend salesforce.com to bake in as many measurement points of the customer's behavior as you can. Click-path analysis in the customer self service portal tells you a lot about things to improve in your operation. Online surveys (keep them short!) at the end of every customer interaction help you develop a wholistic picture of your customer relationships as they evolve.

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, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

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