

Will Swaney



Let's work together to transform your organization.

Support Improvements

Delivering on customer promise while increasing CSAT, NPS, reducing churn, and growing a team of experts at scale.

WAIT TIME REDUCTIONS

(start wait/reduction)

Phone: 4min/**1min**

Email: 24hr/**6hr**

Added chat, social media, and SMS support driving a **35%** of phone contacts to these methods with a **30sec** or less average response time at a **4.0+ CSAT**.

CSAT INCREASE

At ShopKeep, once I changed the hiring profile to search for service backgrounds, we saw retention soar and advisors connect with customers raising the CSAT from 2.5 to an average of 4.1.

Training and Development

- Service focused training with technical basics (5 days)
- Created a library to walk through all standard troubleshooting in Slack (AI and other automation tools)
- Top driver meeting weekly to create new training and documentation
- Weekly newsletter release with quiz for all support agents

Reduction in handle time from 18+min to a 10min average on phone support contacts

Generated Millions

In additional revenue across multiple organizations added by offering teams an upgrade/upsell options on their plans based on solving their support ticket(s) and needs of their customer. Support agents earn commission on the upgrades giving incentives to the team to offer accordingly. This is a knowledge share with the customer to implement retention and highest LTV.

Scaling Customer and/or Operational Support

I have personally scaled and built teams from 1-100+ high performing team members across multiple organizations and business types.

HOW DO WE HIRE FOR SCALE?

- Create a hiring profile based on core values and business needs 2+ years out, with monthly hiring goals
 - Exit interview program to increase retention
 - Create a clear path for technical and leadership advancement training (cohorts based on performance/tenure/specialty)
 - Offer referral bonus programs that offer retention incentives over time
 - Use heatmap based contact thermometer to know optimal headcount for every hour and allocate labor accordingly
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TEAM RETENTION

Creating a place where growth is the constant goal will build a team that grows into leadership and captures the long term vision of the organization.

HOW WILL WE RETAIN TALENT?

- Weekly 1-1 meeting between direct reports and their manager
 - Retention bonuses in year 1 based on tenure and performance
 - Internal hiring for promotion whenever possible
 - Monthly lunch and learns with other departments (engineering, product, etc.)
 - Top driver reporting shared with support to reduce multi contact customers (leads to stress and churn of agents)
 - Support and operation based hackathons
 - Team suggestion roundtables for process improvements
 - Monthly All Hands to keep all informed of current and future state
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KEY PERFORMANCE INDICATORS

Key performance indicators are very important to success. The metrics can vary from channel to channel, but with a focus on customer satisfaction the end result will always align if the vision is clear.

METRICS FOR SUCCESS

- Contacts per customer (less than 1CPC monthly)
 - Multi touch cases monthly (less than 25%)
 - Average wait time per channel (30sec)
 - Average CSAT per channel (4.0+)
 - Average NPS score
 - Social media chatter/Review sites
 - % self service deflection (drivers that can be self service without contact)
 - Customer churn (before/after contact)
 - Budget forecast/actuals-“Are we meeting the promise while staying in budget?”
 - Organizational alignment- “Are the KPIs exceeding goals and supporting the growth vision of the organization?”
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STACKING SUPPORT OFFERINGS

There is a balance between how many options a customer has to contact support. Too many channels not done well will lead to dissatisfaction.

SUPPORT OFFERINGS/TOOLS PROCESSES

- Poll customers on contact wish list (phone, etc)
 - Focus on chat and SMS performance to reduce wait, handle time, and repeat contacts
 - Outbound scheduled phone contacts for unresolved tickets
 - Implement onboarding w/shared screen walkthroughs for customer understanding and success
 - Monthly customer webinars led by a team SME to promote product usage and adoption
 - Tiered support modeling based on MRR
 - Customer newsletter based on top contact drivers to reduce contacts to support
 - Self support initiatives to reduce contact before case creation.
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TOOLS AND PROCESSES

In a support organization each tool and process should ease the burden on the customer and the agent, either by need to contact, time to support, customer satisfaction, agent satisfaction and/or cost savings.

TOOL AND PROCESS EVALUATION

- Guru (or similar) Slack walkthroughs to expedite contacts with linear troubleshooting
 - TextExpander for fast response to simple questions and troubleshooting
 - Loris.AI for real time coaching
 - Looker for KPI modeling and customer data
 - Social Media Customer Service in Zendesk (or Salesforce)
 - AnswerBot(s) for support channels
 - SMS support
 - Outbound voice feasibility
 - LMS for training and certification training
 - Bug ticket filing creation integration for Slack
 - Product feature request/parity ticket management
 - Custom Slack integrations for critical communication (attendance, high value tickets, churn possibility, low CSAT, social cases, etc.)
 - Internal comms for announcements and engagement
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DIFFERENTIATION IN SUPPORT

Understanding the culture of the overall organization and then creating a culture that exudes these values will make the team proud each day and increase the value add to the greater organization.

WHY WILL THE TEAM BE DIFFERENT/UNIQUE?

- Every individual has a seat at the table- great ideas come from giving all a voice
 - Support roundtables to discuss top barriers and idea sessions (rotating cohorts)
 - Process, procedure, and tools are always open to improvement or change as needed to support the team and organization.
 - Transparent KPIs for success, growth, and promotional opportunities
 - Technical training cohorts
 - Leadership training cohorts
 - Presentation opportunities in all hands to share peer knowledge
 - Monthly leadership book club
 - Team contests around using internal tools
 - Video check-ins and 1-1s
 - Happy hours (where we serve non profits to deliver happiness in our community)
 - Peer partner program (pair a top performer with a new hire for 90 days as a buddy)
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EXCEPTIONAL CUSTOMER SUPPORT

Exceptional customer support is a mix of a many different variables. All are important on their own, but working together they take the interaction above and beyond. A friendly conversation is just the start. Customer conversations quickly go through up to 10 steps from start to finish with exceptional quality and leave customers glad to reach out whenever they need support.

WHAT DOES EXCEPTIONAL SUPPORT LOOK LIKE?

- Response Time- “Do we respect the customer’s time?”
- Friendly Conversation- “Does the customer feel like this is a conversation or a transaction?”
- Engagement- “Did I listen to the customer to really understand their issue without jumping to conclusions?”
- Echo- “Did I repeat the issue to the customer so that we agree on the issue to resolve?”
- Troubleshooting/Investigation- “Did I use all of the tools available to me to follow a linear path to diagnose and resolve the customer’s issue?”
- Efficiency- “Did I take the time needed to get the correct answer to resolve the situation fully?”
- Clarification- “Does the customer understand what I am explaining and what steps I need them to take to resolve the issue?”
- Confirmation- “Does the customer agree their issue is resolved?”
- Appreciation- “Did I thank the customer genuinely for the conversation, for being a customer, and the opportunity to assist them today?”
- Farewell- “Ask for the customer to share their experience with others and do not hesitate to reach out again.”

This is not true of every interaction, but is a framework for always going above and beyond.

SCALING TO 100 MILLION

As a team grows and gets larger, there has to be an increased focus on the common threads that make the team thrive. Investing into making sure culture and core values do not get lost in the growth spurts will lead to scaling longevity. Clear vision with clear goals will lead a team to their greatest potential.

OBSTACLES AND OPPORTUNITIES

- **HIRING-** As hiring increases, a large obstacle is quality and consistency in hire quality and new hire training. Moving too quickly can cause for negative culture fits, unprepared new hires, customer dissatisfaction. This can lead to low morale, and to team and customer churn.
- **TRAINING-** Taking the proper time to train for agent success can be an obstacle because of growth, but if it is immovable it will pay off for the agent and the customer they support.
- **AGENT GROWTH-** More customers means more contacts per agent, tenured agents will not be used to handling this many contacts and will have to understand the growth needed over time to have buy in to process and be peer leaders to the new normal.
- **RESPONSE TIME-** When hyper growth occurs, response time will suffer initially, and having an executive understanding of this is important. If the focus is on quality while strategizing how to reduce response times then it will pay back the weeks where speed suffered by only having one customer interaction that was resolved at the highest satisfaction.
- **CSAT-** More customers will onboard at lower tiers and generally be the rate of lower CSAT scores when they occur. Understanding the needs of each tier of customer as they become clear will allow a proper support model for every tier of customer.

This is sampling of obstacles and opportunities when scaling the organization. Everything can be overcome with diligence and communication across all departments and teams.

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If I have delivered value and I can help your team, please [reach out!](#)