

# Customer Service Experts Interview

An in Depth Look on How Customer Service Leaders Manage Critical Events



**Dave Hare**

**Senior Vice President of Customer Success**

David Hare is Senior Vice President of Customer Success with over 30 years of experience building, designing, and managing world-class service delivery organizations, international and offshore, with profitable service operations and industry leading customer satisfaction.

**What has been your biggest support related challenge? How did you overcome it, or if the challenge is ongoing, what steps are you taking?**

Support Engineer retention. We overcame it by literally starting a campaign on support/service as a profession. We worked with some colleges as well as known industry associations to bring up the "stature" of support within the hierarchy of technical roles.

**Can you recall a specific critical event (for example: natural disaster, holiday rush, new product launch, etc.) where you had to manage a large spike in call volume/web traffic/questions?**

Anyone who has been in support for any length of time has experienced new product launches that did not go as well as planned. [Dave inserts smiley face here.]

**How did you respond to it, and what did you learn from that experience?**

We had an unnaturally high call volume and the average wait times were measured in hours. So we shut the phones off and "guided" customers to our web portal. This allowed us to add technical folks from the entire company to address web submitted issues. We had developers, sustaining engineering, Sales, Engineers, and Solution Architects helping us out until we had things back to normal. We also paired technical doc writers with employees who were solving problems so that they could write knowledge articles on the fly and post them in almost real time. We found that this went over well with our customers even after we had things back to normal. As a result, our self-service rate going forward doubled and improved slightly as we added more content.

**What role does self-service and automation play in the total customer experience?**

More and more of the millennials don't want to speak to agents. They want to solve problems on their own, in the way they are accustomed to working and that is on the web with as much automation as possible. It is increasingly important to have multiple channels to serve all of your customers.

**If you could share advice with others in your role, what would it be?**

Think automation and self-service first. Build it into the product, get a seat at the table at the highest level of the company you can. Come armed with data on the value, customer loyalty, and cost benefits of automation and self-service. The facts, numbers, and statistics don't lie.



**Garry Schultz**

**Customer Success Executive**

Garry Schultz is Customer Success Executive of 20+ years. Focused in the international B2C and B2B software market, Garry has moved the bar forward with AVG Technologies, BlackBerry and Intuit.

**What has been your biggest support related challenge? How did you overcome it, or if the challenge is ongoing, what steps are you taking?**

Recognition of customer sentiment is the biggest challenge I have faced. The issue is not that the C-suite denies its existence but in proving the long-term effect sentiment has on the health of the corporation. We may talk about AHT, AWT and ASA metrics, we can measure NPS and CSAT, but how do we quantify the silence of a disenfranchised/disengaged/disinterested customer?

The first step is in agreeing on a goal, after which build a working model and establish a vocabulary to facilitate actionable dialog. Second step is building and executing on a quantification framework. Third step is run a gap-analysis between the data in the second step, and the established goal of the first step, and then execute, execute, execute.

It may come as no surprise that step two is the hard part.... the secret sauce stage.

**Can you recall a specific critical event (i.e. natural disaster, holiday rush, new product launch, etc.) where you had to manage a large spike in call volume/web traffic?**

Numerous. The key is – per the Scouts of America – be prepared. Sophisticated post-sale support organizations host a multi-channel environment. In times of volume stress, an effective response is to re-balance the channels. That is; send more customers to self-serve V-agents, publish fresh context-sensitive KB collateral immediately for the V-agents to draw off and monitor closely. But, remember to keep the customer, and the customer experience, the center of any re-direction decision.

**How did you respond to it? What did you learn from that experience?**

The learning is the redirection described above. The extension of the technique is to apply algorithm driven decision tools to invoke the mechanism expediently (automatically, accurately, unemotionally, 24x7).

The additional lesson learned is build the customer messaging collateral well before it is needed. Anticipate worse case scenarios. Author it, test it, tweak it, stage it and then affect an algorithm to deploy it in an emergency.

**What role does self-service and automation play in the total customer experience?**

The industry has been morphing. Some feel the shift away from traditional telephony support to be heresy. But, it is here and now. I still have conversations with old-school peers that hold on to the idea that telephone is the most desired channel for customers PERIOD (emphasis is theirs). While that may be true for some demographics, the overwhelming evidence from the industry pundits, from customers, is that the shift has occurred. I can draw an analog to my family:

I prefer online support – email is my choice of channel if I cannot serve myself

My brother, retired high-school teacher, prefers phone – he adamantly demands a voice

My daughter, also a high-school teacher, prefers online tools – last thing she wants is to talk to an agent

I contend this mix is the norm. Where do you put resources? Simple – what demographic do you serve and where is your projected growth? Apply relief as needed.

The broader ramification of this is self-service is growing in importance. If you have not acted yet (perhaps you have been living in a cave) it is time to get to it.

If you could share advice with others in your role, what would it be?

Internalize the following definition: Reflect first upon yourself, then your team. Are you protean rich?

## pro·te·an

/ˈprōtēən,prōˈtēən/ 

*adjective*

tending or able to change frequently or easily.

"it is difficult to comprehend the whole of this protean subject"

*synonyms:* ever-changing, variable, changeable, mutable, kaleidoscopic, inconstant, inconsistent, unstable, shifting, unsettled, fluctuating, fluid, wavering, vacillating, mercurial, volatile; *technical labile*  
"the protean nature of mental disorders"

- able to do many different things; versatile.

"Shostakovich was a remarkably protean composer, one at home in a wide range of styles"

*synonyms:* versatile, adaptable, flexible, all-around, multifaceted, multitalented, many-sided  
"a remarkably protean composer"



**Bill Rose**  
**Service Executive**

My name is Bill Rose and I have been in the technology services industry for 40 years. The first 20 years were spent holding every position from field service rep to software support engineer to service management and finally to service executive. Most of my time was spent in the United States Air Force, IBM and Hitachi Data Systems. In 1989 I founded the Service & Support Professionals Association (SSPA) which has been morphed over the past 20 years into the Technology Services Industry Association (TSIA). Today the TSIA is the largest trade association dedicated to the improvement of services within the technology industry. Over the years we have developed multiple certification programs including the J.D. Power Support Center Certification along with individual certifications for technicians to executives. [www.BillRoseINC.com](http://www.BillRoseINC.com)

**What has been your biggest support related challenge? How did you overcome it, or if the challenge is ongoing, what steps are you taking?**

Over the years there has been one service challenge that still remains a critical issue today....Resolve Time. We define this as the time it takes to resolve an issue to the customer's satisfaction. My focus in particular has been on first contact resolution (FCR). For years the number one customer satisfaction issue has been the time it takes to resolve their issues. Most customers think it just takes too long. The thing that is extremely interesting to me is that industry data shows that 85% of all service requests across all types of tech companies can be classified as usability issues. That's right, there is nothing broken. Customers are just trying to use the product to its fullest. This means that these issues are not complex or really technical. They are questions about how to use the product. If we can understand this then we should be able to provide the proper training and skills to our service technicians that will allow them to fix issues faster. It seems simple but can be very challenging. At every opportunity I have discussed this issue at conferences and seminars. If we can continue to focus our attention on fixing customer issues faster we will be delivering exactly what customers want and need.

**Can you recall a specific critical event (i.e. natural disaster, holiday rush, new product launch...) where you had to manage a large spike in call volume/web traffic/questions? ---- In this case, you might share how you help others address these critical events.**

It seems like history repeats itself each and every time we launch a new product or even a new version of an existing product. Most service organizations are not prepared to handle the onslaught of calls from customers who have questions about the changes in their product. Most service organization run at full capacity and an influx of new issues can flood the phones and inboxes.

**How did you respond to it? What did you learn from that experience?**

It is Imperative that we get ahead of the game by doing analysis on possible scenarios if and when the new issues start pouring in. How are you going to handle more customer requests when you are barely able to keep up with the pace today? We need a game plan that we hope will never be used. A plan to handle all of the requests that could possibly come in and we hope they never do. We won't be able to add new people fast enough to handle these issues so we have to find alternative ways to deliver service. Our best hope is to ensure that our "non-assisted" service delivery tools can pick off as many issues as possible.

**What role does self-service and automation play in the total customer experience? Describe.**

There is a subset of our customers that will always want to use the telephone but this is rapidly changing. As our self-service tools become more sophisticated the customer experience increases drastically. The smarter these tools become the more customers are willing to use them again and again. The most expensive method we can use to deliver service is to take a senior tech and put him on a plane to the customer's location. The least expensive way to deliver service is to deploy sophisticated self-service tools that really work and give customers what they want: answers to their questions.

**If you could share advice with others in the service/support industry, what would it be?**

Of all of the service metrics that we collect and monitor, the one thing we seldom know is "Why do customers call?". This seems like a very simple thing to track but few of us collect and analyze this vital piece of information. If we understand why customers are calling then we can staff our support operations with the correct skill sets, choose automated self-service tools that truly answer customer questions and provide better service than we have in the past . Why are your customers calling?