THE ALIGNMENT ADVANTAGE

Why Cross-Team Collaboration Should Start With Support

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Introduction

A lot of companies talk about collaboration, but few practice what they preach.

Sales reps are unclear about marketing initiatives, marketing may not accurately portray the use-case of a new feature, and for the most part, the product team just wants to be left alone.

Amidst the chaos, one department is left to listen to the most important voice in the room: the end user.

For any business striving to call itself customer-centric, the cleanup must begin with the support team. These service professionals speak to clients on a regular basis and know more about use-cases, short-comings, and successes than any other department.

But support teams can’t build an outstanding customer experience all on their own. They need other departments to carry their insights throughout the business, and they need organizational support from managers and c-level employees alike.

In this guide, we'll discuss several ways your organization's support team can align with marketing, sales, and product to form one well-connected system.

Scenario 1

Customer Service & Marketing

You finally did it.

After eyeing those Facebook ads for weeks, you decide to book a week-long stay at a fancy resort for several hundred dollars below market rate.

There's just one catch: The rate you saw applies to a different property.

You don't discover this until you hit the landing page where your comparatively crummy accommodations become clear.

Frustrated, you call support for an explanation. Instead of providing one, they reaffirm pricing and ask whether you'd like to book the deluxe property.

They're more than willing to charge your card. But they're not so willing to discuss the root of the problem—poor alignment between teams.

These scenarios happen often. At some point, we've all felt misled by marketing messages. We've all grown frustrated when support seems oblivious to their promises, and in response, we've all taken our business elsewhere.

Your customers will do the same.

The cost of misalignment

The lines between customer service and marketing have blurred.

From customers seeking help on social to the growing focus on brand advocacy and word-of-mouth marketing, there's never been a better time for these teams to make friends.

But at most organizations, the divide between customer service and marketing remains firmly intact. As people whose work relies heavily on effective communication, the majority of marketing and support squads never compare notes.

Unsurprisingly, their level of rapport can impact revenue.

Source: Aberdeen Group

According to research from Aberdeen Group, companies that align their customer service and marketing activities are able to:

Earn free marketing and brand awareness via more positive social media mentions

Salvage relationships and undo churn with high customer win-back rates

Generate loyalty in a disloyal era via significantly increased customer retention

Prioritize the customer experience to drive high levels of customer satisfaction

As for the companies that don't, their support teams function like fancy resort reservationists, striving to push things forward without really considering the customer's perspective.

For these organizations, lack of alignment translates to:

- Less customer retention and more churn
- Wasted marketing efforts and spend
- Negative reviews that scare prospective customers away

Make no mistake—misalignment between customer service and marketing is decidedly unprofitable.

Here's the good news

Whether you're in B2B, B2C, SaaS, or eCommerce, your team can spearhead at least one of the following activities to drive better alignment between teams—and, more importantly, better experiences for customers and prospects.

5 Ways To Align Customer Service & Marketing

1

Start a knowledge base for marketing promos

Marketing promotions may succeed at generating interest, but it often comes at a price.

Whether they're pushing an upcoming webinar, site-wide sale, or local event, marketing rarely fields questions from customers. Customers make a beeline for support.

And they expect agents to address their concerns with the same level of authority as they would any other question.

But when a company's customer service and marketing teams don't sync on promos, agents are forced to find the fine print before they can actually help people.

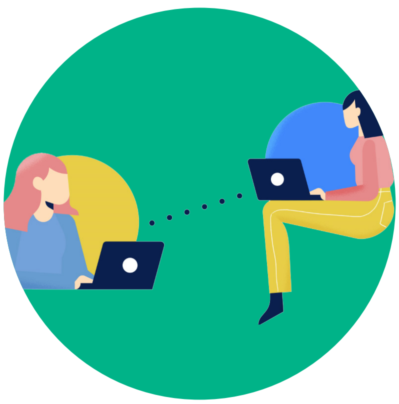
This can be especially problematic when marketing promos are inadvertently misleading. Customer service must inherit the confusion—and probable frustration—of the customer while also feeling pretty frustrated themselves.

Without the facts at their disposal, they have two options: put the customer on hold while they try to flag someone down, or take a message, wait on marketing, and then get back to the customer.

Not only is this an ineffective use of agent and customer time, it also reminds customers that your marketing and support teams are separate units operating on their own terms.

To bridge the gap, create a repository for all company promotions. It could be as simple as a series of well-organized Google spreadsheets, as accessible as a Slack channel, or as structured as a knowledge management system.

What's most important is that it's:



Easily accessible to both teams

Owned and maintained by someone in marketing

When customer service and marketing align on promos, your organization can better calibrate customer expectations and empower reps with a single source of truth. Instead of making customers wait, reps can deliver promo information as reliably as they can information about your product or service.

This will help to create seamless brand experiences that make customers feel like they're speaking to the same person—no matter what department they're in.

2

Craft a social media support strategy

One of the most obvious but frequently overlooked ways to drive alignment between customer service and marketing is social media.

According to Microsoft, almost two-thirds of adults between 18 and 34 believe social media is an effective channel for customer service issues—and they're probably right.

But with most company social accounts nestled under marketing, support reps often have no idea what's happening on customers' favorite networks. And marketers lack the knowledge—and often the patience—to figure out how best to respond when customers enter their domain with issues instead of interest.

For example, when marketing receives a complaint on social, they can respond in a few ways:

- **The laissez-faire approach:** Marketing notifies the support team, leaving them to handle it.
- **The caution-be-damned approach:** Marketing takes a stab at handling it themselves, even if they're not totally sure how to respond.
- **The team player approach:** Marketing asks support how to respond and replies to the customer based on this feedback.
- **The not-my-job approach:** Marketing sees the message but doesn't notify support or attempt to respond.

While ignoring customers on any channel is a poor choice, responding and getting it wrong could be equally damaging: The number one reason consumers unfollow brands is bad customer service.

According to Sprout Social, poor brand responses on social also lead consumers to:

- Share their experience online (41 percent)
- Share their experience offline (42 percent)
- Boycott brands altogether (50 percent)

Rather than risk their reputations, organizations that align their customer service and marketing functions define exactly how to handle support requests across networks. To get each team on the same page, they eliminate guesswork with a social customer care strategy.

Here's where to start with marketing:

Conduct an audit to understand issues and volume:

How many incoming messages or @mentions are customer service related? What are customers asking about?

Define when to deflect:

It's not uncommon for social support teams to respond once or twice before moving a customer to another channel—you just need to agree on when it makes sense to do so.

Decide who responds to what:

If marketing is open to fielding simple support requests, let them—even if it's just to say "We're so sorry! Please DM us your [unique identifier] and someone from our team will get back to you." If they're not, task a select agent (or two) and have marketing share login information.

Consider a dedicated tool:

There's a growing list of third-party social media tools that make it easy for marketing to route support requests to agents. If you have or anticipate a high volume across networks, getting one is a must to scale.

3

Build better buyer personas

Buyer personas are a challenging notion. As fictional representations of potential customers, they're supposed to help marketing teams connect more effectively with target audiences—the motto being if you can understand them, you can engage them.

The idea makes perfect sense in theory. In practice, many marketers operate with a superficial understanding of their target audience. In their zeal to define and document personas, they lean on data found in market research and Google Analytics.

Removed from the human element, they profile and pursue ideal buyers instead of real ones. In the process, prospects are often reduced to demographics and feature sets.

And it takes more than that to resonate with human beings.

It takes a holistic understanding of the real-world situations that lead to a sale—something customer support reps build naturally over time.

Whether your organization is starting from scratch or revising an existing set, creating buyer personas shouldn't fall squarely on marketing. Not when there are so many resident experts on your support team.

Marketing may not think to ask for support's help, but that doesn't mean your team can't offer it. According to industry-leader, [Content Marketing Institute] (CMI), sharing customer support data can help marketers suss out information they can use to build better buyer personas.

Ask your support squad to consider:

What questions they hear from prospects: This may not seem super important to support reps in the moment, but for marketers, it's a goldmine. Questions almost always precede decisions––especially purchase decisions.

What questions they hear from existing customers: Understanding what existing customers care about post-sale enables marketers to add more depth to buyer personas. In what ways do they seek help applying your solution to their problem?

What internal content helps get the job done: Does your team take on manual tasks for customers to make their lives easier—or to make up for product shortcomings? Any internal how-to document that helps agents do their jobs will reveal a lot about customer needs and values.

What skills customers need to be successful with your product: Many SaaS products (Aircall included) are capable of doing more for tech-savvy users while remaining useful and accessible to people who prefer plug and play solutions. With data from support, marketing can meet different buyers where they are.

What customers say about your product: Customers do more than complain when things don't work. They also shower brands with hard-to-beat praise when things do. Given insight into both positive and negative feedback, marketing can write to your strengths and prospect pain points.

By looping support into the process, marketing can leverage their knowledge of real customers to speak to the real-life situations prospects actually care about.

4

Create trustworthy content and campaigns

Every marketer's chief goal is to build a bridge between what's being sold and who's buying it.

- **For content marketers**, this means coming up with relevant ideas and transforming them into engaging and educational content to attract prospects.
- **For acquisition specialists**, it involves experimenting with different channels and tactics to attract and convert prospects into customers.
- **For marketing operations**, it's about making sure the various touch points connect so the team can assess the ultimate impact of their efforts.

But good marketing doesn't materialize like magic. Marketers can attend conferences, earn certifications, scour review sites, spend hours on keyword research and still fail to connect with their target audience.

The problem can usually be traced back to empathy—the most persuasive and engaging marketing ideas often come from the audience itself.

Which is why customer service teams are uniquely poised to help drive better marketing content and campaigns: The best support reps don't just field customer frustrations, they inherit them.

And if they're encouraged to share their insights with marketing—including why they care about customer problems on a personal level—marketers can write with the empathy needed to make meaningful impressions on prospects. The kind that makes them sit up straighter, share a link with a friend, or finally request that demo.

Using the same framework from CMI, here's how marketing might leverage support's insights:

Use prospect questions to create on-demand content, like an FAQ page that lives on your site or a whitepaper they can download.

Use existing customer feedback to create and inform content that demonstrates an ongoing commitment to meeting their needs, like Q&A videos or articles that address popular questions and common complaints.

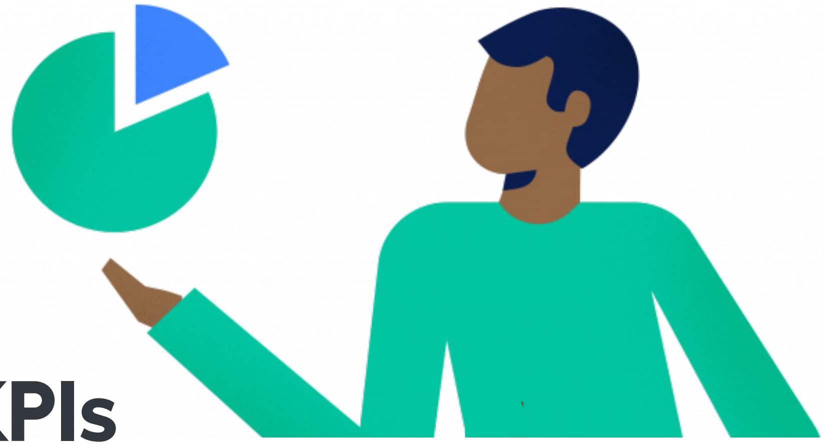
Use internal how-to documents to create relevant blog content that addresses pain points upfront. Offer how-to guides and/or video tutorials to new customers post-sale.

Use positive customer feedback to create testimonial content that doubles as social proof. Quotes, customer videos, and case studies chock full of positive customer experiences are all good options.

Finally, ask marketing if there are any writing opportunities for interested members of your team. One of our own senior support specialists used her expertise to write about customer service language—and the Aircall marketing squad really appreciated it.

If you've ever been successfully sold by a landing page, or clicked through a company's blog archive after reading one exceptionally good post, this is the level of familiarity to target. Support can help marketing achieve that.

5



Share some KPIs

The key to productive collaboration is purpose. If you can't answer the question of *Why are we doing this*, your alignment efforts will likely lose steam before making a discernible impact.

For support and marketing to collaborate effectively, there should ideally be more at stake than a nebulous goal like "improving the customer experience." Both teams should be able to answer the question of *How*.

The solution here is to identify a few key performance indicators (KPIs) that both customer service and marketing can work towards.

Depending on your industry or vertical, this might include:

User Generated Content (UGC): From YouTube to Yelp, UGC powers some of the most popular websites in the world. To lend trust and transparency to the buying process, support reps and marketers can join forces to strategize ways to elicit more (and better) user generated content.

Net Promoter Score (NPS): Support knows who's who among your customer base. Involving them in NPS recruitment means you can more easily and reliably curate reviews from your most enthusiastic customers. Known as promoters, these folks are likely to be thoroughly satisfied with your product or service, and even more impressed by your support team.

Data associated with collaborative activities: To ensure your teams aren't working together in vain, you may also want to track data associated with their newfound collaboration. This could include:

- Number of support requests about marketing activities (e.g. promos)
- Support-influenced campaign performance vs. previous campaign performance
- Social media sentiment (as measured by support + marketing engagements)

Maintaining the relationship

The relationship between customer service and marketing is far from symbiotic for most organizations, but it should be.

Support needs to know where and how marketing plans to pursue and engage new and existing customers—and marketing needs a finger on the pulse of customer needs to create effective plans for prospects and existing customers alike.

You can invest in integrated tools and figure out how to align KPIs, but without a motivated group of people, you'll be back to separate interests in no time.

Pledge your allegiance by:

- Setting clear goals, both overarching (e.g. improve CX) and measurable (e.g. earn more social media mentions)
- Defining how to achieve goals—and who will own the work needed to see them through
- Meeting regularly, always with a pre-defined purpose and action items for follow up

Scenario 2

Customer Service and Sales

Picture it: Your desk, 2020.

After considering several software solutions, your team concludes it's found The One.

Before you can commit, you need to know how it connects with your existing tech stack.

When demo day arrives, your sales rep leads with enthusiasm: You'll save time! Double revenue!

Become a king among men!

The future looks even brighter when you learn their solution integrates with your primary tool to do exactly what you need.

But when you ask to see the integration in action, your rep races through the basics before signing off for another call. She assures you the integration will do what you need. She reiterates what a good fit their solution is for your business.

Against your better judgment, you move forward without making sure it checks all the boxes. She is confident.

You are sold.

Within a few days of purchase, you hit a blocker. The integration exists, but it seems too limited to be helpful. And your once-attentive sales rep hasn't responded to any of your emails.

You ring customer service for help, but all the agent can do is apologize for The Confusion.
As it turns out, their tool "doesn't do that." And it's unlikely it will any time soon.

These scenarios happen often. And it's not because salespeople are inherently dishonest.

It's because customer service and sales have no stake in each other's success.

The customer service & sales rift

The potential for synergy between customer service and sales is easy to spot. Sales teams work to reel customers in and support teams strive to keep them around.

In an ideal world, they meet at various points in the middle to compare notes.

But in an era where investing in the customer experience has the potential to double a company's revenue, most sales and support teams remain surprisingly misaligned.

A huge part of the problem stems from lack of visibility into each other's work. Customer service teams usually know little about the sales process, and sales typically wants little to do with prospects once they become customers.

It's not that sales reps are ruthless mercenaries—or that support reps don't care whether the business grows. In reality, both teams are often too busy working in their respective domains to engage with other departments.

This is how most organizations operate. As customer-facing teams, the majority of sales and support squads follow their own set of goals, philosophies, and KPIs—few of which foster collaboration. Unsurprisingly, these competing priorities can breed contempt.

For sales, aggressive quotas and ambitious company goals around growth lead reps to chase bad-fit deals in exchange for job security. And since it's not uncommon for an organization to pursue big-time growth without scaling its customer service function, the sales team's success can quickly become support's burden.

This friction goes both ways:

- **Support reps can view sales as irresponsible and self-interested.** When sales makes a habit of closing poor-fit deals that evolve into dissatisfied users, support associates them with difficult interactions and seemingly non-stop tickets.

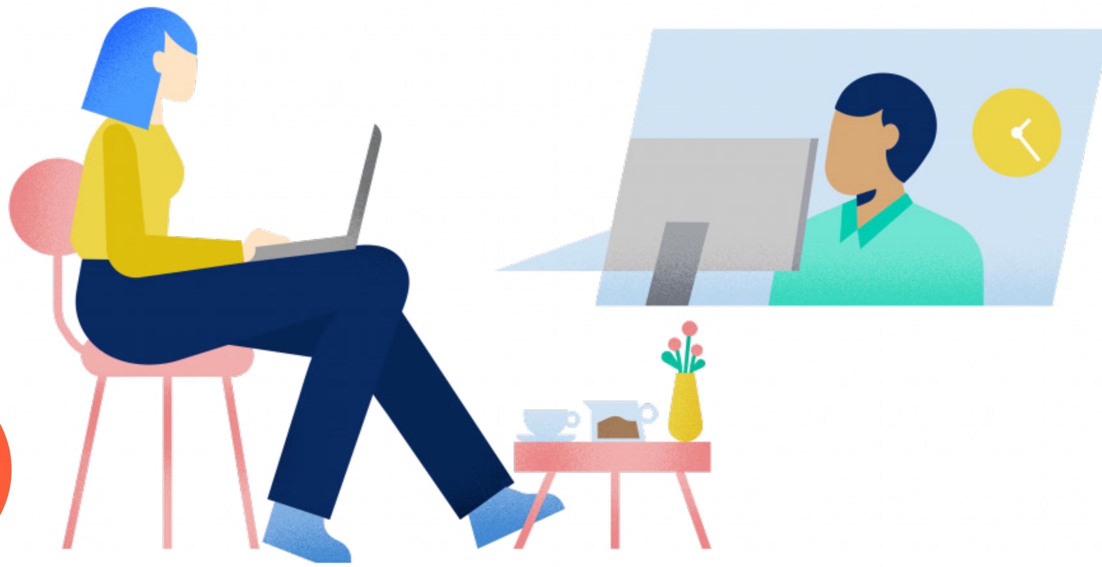
- **Sales reps can view support as disgruntled bringers of churn.** When the quality of agent-customer interactions takes an inevitable hit, negative reviews, customer churn, and fewer sales opportunities are soon to follow.

By creating silos, organizations promote resistance and resentment between two of their most vital functions. The byproduct of these tensions is the trickle-down effect it has on customers, prospects, and your brand's reputation.

Here's the good news

With a few meaningful adjustments to the way a business promotes and measures sales and support success, organizations across industries can increase sales velocity, deliver consistent brand experiences, and keep customer retention high.

5 Ways To Align Customer Service & Sales



1

Enforce meaningful facetime

The most surefire way for these teams to overcome negative perceptions of each other is by forging mutual understanding.

Meaningful, ongoing contact makes this possible. By breaking down the communication barriers that prevent sales and support from coming together for the common good, increased facetime should:

- Help customer service and sales reps **establish empathy** for each other
- Get them to **partner on activities** that help them to do their jobs better

Here's a few productive and empathy-building options:

1

Buddy systems

Both sales and customer service benefit from easy access to reliable information. A support and sales buddy system is a simple way to provide them with exactly that.

With a dedicated individual (or several individuals) on the other team, sales and support reps can get trustworthy answers from the folks who know best—whether sales needs specific product information, or support has questions about pricing.

The idea isn't for them to become best friends (though that's always nice) but to keep both sides in the loop throughout the customer life cycle—from trailing prospects to expansion opportunities.

2

Deal desks

A deal desk is a process for evaluating promising leads to ensure product or service fit. To achieve this, account executives (AEs) must "sell" the deal to relevant colleagues from other departments—usually marketing, product, and customer success.

Given their extensive knowledge of your existing customer base—and the impact poor-fit customers have on their day-to-day work—your support team deserves a seat at the table. They're bound to have valuable ideas about the types of companies coming down your pipeline and can leverage these insights to help your organization pursue growth more responsibly. As one sales exec put it, "If you want clean water, send it through a filter."

3

Cross-team training or shadowing

Understanding the relevance of each other's work is crucial to building empathy and respect between teams.

Your support team should understand the entire sales cycle (i.e. prospecting, discovery, demo, close) and how they fit into the process. The sales team should understand real use cases, what the product can and can't do, and what sorts of questions and problems customers encounter while using it.

Whether you frame it as training or shadowing, allow reps from each team to observe the work of their newly appointed buddy and learn from their process. Consider making it a part of onboarding new hires.

When you get it right, sales can avoid overpromising (or telling partial truths) to prospects who may not be the best fit for your product or service. On the support side, reps will be better prepared to field questions from prospects who make it to your help center and opt to engage with them directly.

2

Prioritize customer-focused incentives

Most organizations promote short-term incentives that divide their sales and support teams instead of uniting them.

Sales is incentivized to win as many customers as possible—as quickly as possible—because their team is seen as the main growth driver of the business. Support is incentivized to respond to and close tickets as quickly as possible because customer service is still viewed as a cost center.

These expectations surface in metrics like time-to-resolution and time-to-close. These metrics indicate how efficient reps are at doing their jobs. They do not account for desirable customer outcomes, or for the relationship between growth and good service.

Instead, they focus mostly on speed. And customers don't get the 5-star support they're promised when support reps struggle to remain friendly and efficient given increasingly unrelenting queues.

To forge better alignment between customer service and sales, high-growth organizations must put long-term, customer-centric metrics ahead of short-term, speed-based ones.

Here are two impactful ways to get started:

1 Give the sales team customer retention goals

To meet the challenge of building and advancing relationships from scratch, sales reps aren't known to engage with prospects once they become customers. By the time they close one deal, they're already pursuing other opportunities.

This is doable at small or early-stage companies, but as an organization grows, everyone should have a hand in customer retention—and their incentives should reflect the organization's focus on the customer experience. For sales, this could include:

- **Modified commission structures** based on customer lifetime value (CLV)
- **Looking at average** revenue per user (ARPU) instead of booking volume
- **Basing performance assessment on adding value**, not customer acquisition

When sales reps receive praise for quality of deals rather than quantity alone, they're more likely to screen prospects for the right fit—which means they're less likely to:

- Make promises around product features or timelines your organization can't keep
- Close bad-fit deals based on overpromises that create future problems for support

2 Empower support to upsell and cross-sell

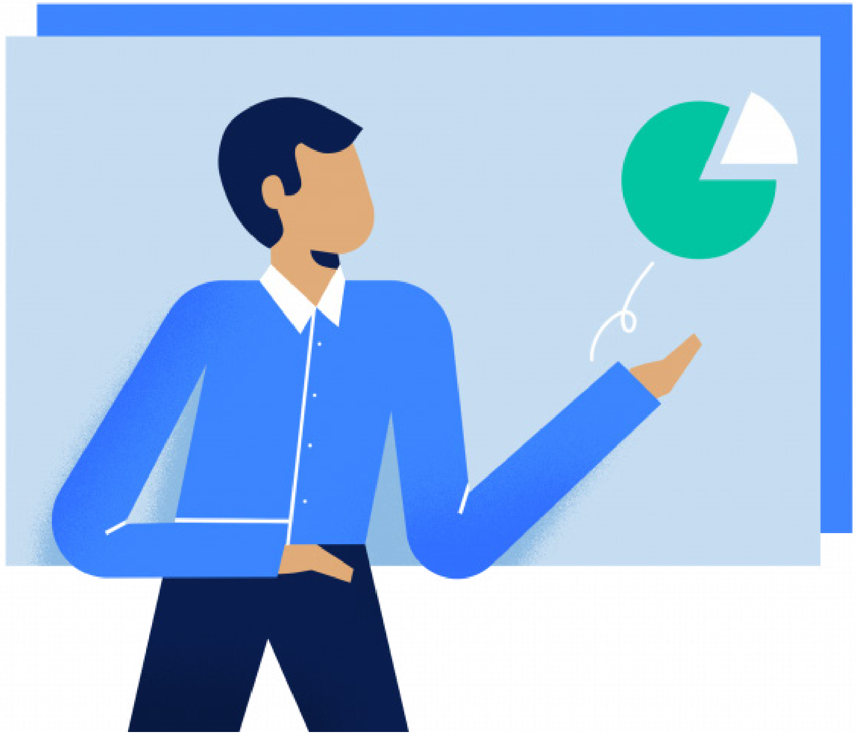
The best support reps are also use case experts. From product usage to customer activities, support teams are in an ideal position to identify expansion opportunities. And they've usually earned the trust to do it without seeming smarmy.

But selling should **never** be your support team's priority. They should never be tasked with any upsell "quotas" or have their performance evaluated in terms of new revenue generated. Instead, managers should look for their ability to recognize when it's appropriate to try.

When they do, their pitches should be framed as recommendations that will solve a problem specific to the customer's unique circumstances. This could include:

- **Subscription or tier upgrades:** If a customer purchased the basic version of your product but needs functionality only available to premium users
- **Additional licenses or seats:** If support notices a customer sharing user accounts or learns of growth at a customer's organization

With customer-centric incentives in place, providing value to retain customers is everyone's job.



3

Declassify each team's data

Your support team's knowledge of sales interactions matters more than most organizations realize. According to Salesforce, 70 percent of customers believe it's crucial to keeping their business.

From product capabilities to a prospect's unique use case, support is better positioned to deliver great service when agents know what sales reps discuss before closing.

That's likely because the transition from prospect to customer is far from transparent. In their zeal to advance pipeline, sales reps rarely make it a point to inform support when new customers come on board.

When trailing prospects find their way to customer service, for example, out-of-the-loop support reps might unintentionally contradict a sales rep or provide inaccurate information. They may even deprioritize their tickets for known paying customers.

These scenarios can create a rough start to the relationship. At worst, any of these interactions could cause sales to lose the deal.

Modern customers know companies collect reams of data about them. And most prefer it when companies put that data to use with contextualized interactions where they're immediately recognized.

To drive better alignment between customer service and sales, organizations must:

- Provide both teams with access to each other’s go-to systems
- Integrate sales and support tools wherever possible
- Encourage tool adoption based on each team’s use case

Allowing two-way access to traditionally siloed data has several benefits. Sales will be better equipped to identify high-quality leads once they know what actual customers sound like, and, given the benefit of context, support can provide the best experience possible—even when someone’s “just on a trial.”

But connected data has an even greater value: It makes it easier for organizations to create seamless brand experiences that build trust from the beginning. According to HBR, tapping into consumers’ fundamental needs is the best way for companies to form emotional connections.

For sales and support teams, this means exploiting all available resources to ensure the customer experience is as frictionless as possible.

4

Align support team growth with sales team growth

It's rare for sales and support to grow at the same pace. As organizations recruit sales reps by the dozen, customer service teams stagnate in size and must work harder to compensate.

Well-meaning support managers are aware of the problem—and will usually lend a hand on the frontlines when needed—but they don't start their own hiring process until efficiency-based metrics like call queue time or first response time take a noticeable hit.

This is all wrong. If an organization wants to drive better alignment between support and sales, what they should really be tracking is **metrics associated with customer retention.**

According to one source, the average SaaS company must keep a customer for 12 months before recouping the cost to obtain them.

Most organizations don't consider this when setting sales targets. Instead, they focus on actualizing flashy financial talking points to please investors—like doubling their net new customers month over month.

Growth isn't a bad goal on its own, but it's counterintuitive to pursue it at the expense of frontline support soldiers forced to do more with less. Many growth-focused organizations hinder their chances by chasing growth single-mindedly—and creating an unmotivating work environment in the process.

Here's a better approach—use your organization's data to figure out:

- The cost to support each new customer
- The cost to onboard each new customer
- The lifetime value (LTV) of each new customer
- How much churn to expect

Given these calculations, organizations can:

- Avoid setting sales targets that promote bad practices
- Rethink the relationship between customer service and sales
- Refocus sales and support activities on serving the customer

Most importantly, organizations can leverage the data to course-correct the uneven hiring practices that accompany high-growth and lead to poor service and churn (not to mention low morale and attrition on the support team).

5

Sell the idea to your C-suite

The biggest obstacle to customer service and sales alignment is company culture.

From mismanaged expansion to the uneven hiring practices that follow, most organizations view and treat their sales and support teams like completely separate entities. But uniting these teams in ways that drive real business results will ultimately require executive approval.

Your organization's C-suite will likely have questions and opinions about how prioritizing different metrics will impact the larger financial picture. Your head of sales is likely to wonder how you plan to incite such a major cultural shift.

As champion of this new initiative, it's your responsibility to provide answers and hear their objections. You'll improve your odds by being prepared and doing a little internal marketing. To start, arrange a meeting (more likely a series of meetings) with all vested parties.

Next, build a business case using internal and external data: How has your team dropped the ball or lost business due to poor alignment? How have other companies who've re-prioritized customer service and sales incentives fared in similar circumstances?

Include an abbreviated version of these benefits in your request to change the status quo. If you can demonstrate why it should matter to the business, to the teams involved, and to the individuals on those teams, your request is more likely to be taken seriously.

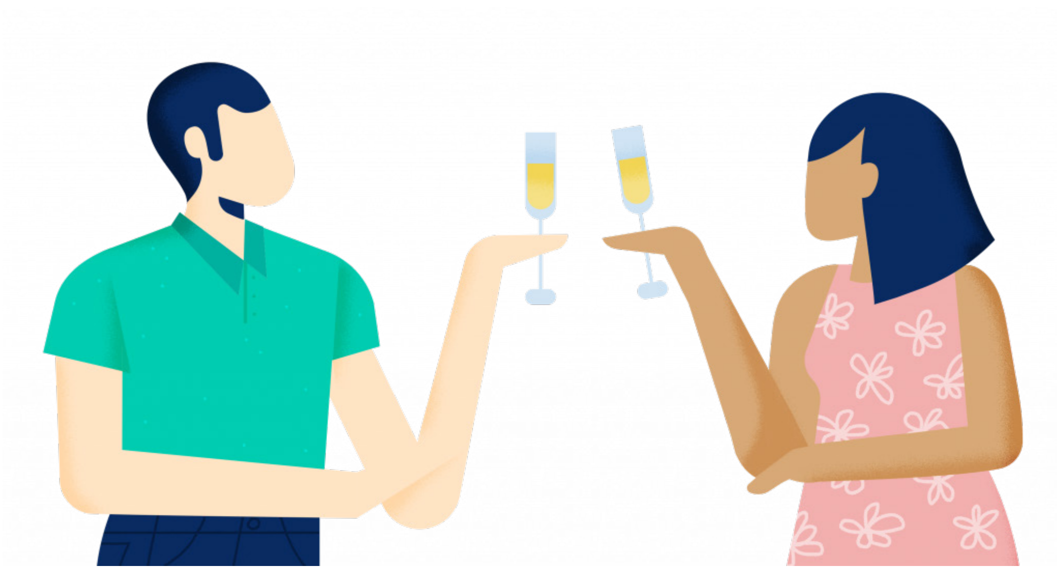
Once you've earned executive support, tailor your message to the parties that matter most: your organization's customer service and sales teams.

Maintaining the relationship

When it comes to building a loyal customer base, the right fit is everything.

An organization's sales team should never feel pressured to embellish the value of your product or service to meet ambitious quotas. And the support team should never make a habit of apologizing for the confusion.

When sales and support are on the same team, your organization can pursue only the most qualified opportunities with full confidence that your solution will help them win.



Key takeaways:

- Build empathy by giving sales and support reasons (and the room) to learn about each other's work
- Find ways to put their newfound knowledge to use to help each team do their jobs more effectively
- Rethink how individual and team success is incentivized and evaluated

Scenario 3

Customer service & product predicament

Your credit report has changed.

That's the subject line of an email you receive from a popular credit monitoring service.

Expecting praise for aggressively reducing your debt, you're surprised when you open it. The email reads:

"Hey Customer,

It looks like there is a change to your TransUnion credit report.

You fell behind on payments on one of your accounts.

Do you recognize this new information?"

You don't.

So you check your credit report with TransUnion where your suspicion is confirmed. There are no missed payments.

You reply to the email asking for an explanation. When support writes back, they ask for information to verify your identity: full name, social security number, date of birth.

Two days later you receive an auto-generated email. Apparently, your request was solved.

Annoyed, you reply again—this time to demand an answer. Instead of providing one, the rep follows up by doubling down.

He sends a lengthy canned response detailing how credit scores are calculated and says nothing of the company's faulty notification emails. You decide to double down too—by deleting your account.

These scenarios happen often. And it's not because support reps enjoy unproductive conversations.

It's because customer service and product only engage when they must.

The customer service and product predicament

Support and product have a great deal in common. Both teams work to create positive user experiences and both know the product better than most of your organization.

They're also not strangers. According to Tony Ulwick, pioneer of the jobs-to-be-done theory, customers "hire" products and services to perform specific jobs.

When those jobs aren't delivered as expected, customer service serves as a safety net—a way for companies to bridge the gap between what customers need and what they're actually getting. In practice, this often includes:

- Completing a task internally that customers can't (or asking the product team to)
- Reporting an issue to the product/engineering team for a fix
- Compiling and communicating customer feedback as feature requests

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- **Customer service teams can view product as indifferent to their perspective.** Whether they're following up on bugs or much-awaited product features, their ability to provide customers with solutions often depends on timely responses from the product team.

- **Product/engineering teams can also see support as indifferent to their plight.** Whether they're trying to make sense of badly written bug reports or wading through unfeasible feature requests, their ability to balance ongoing development needs with unexpected product issues depends on clear and concise briefs from support.

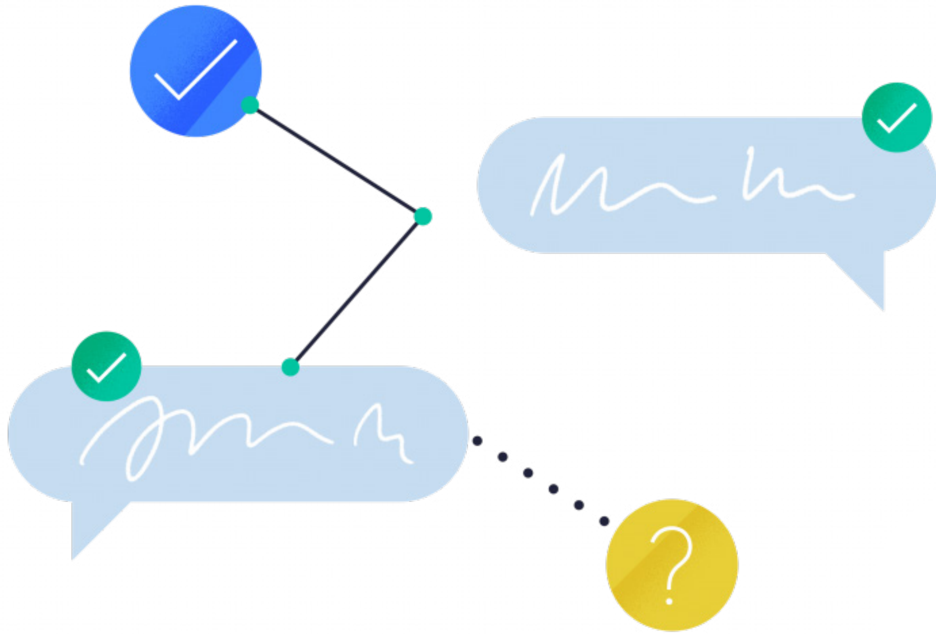
Amidst these tensions, customers suffer, products stagnate, and members from each team like their jobs (and each other) a lot less.

Worst of all, the gap between what customers want and what an organization can deliver widens, paving the way for competitors with similar solutions—and better alignment between teams—to gain market share.

Here's the good news

When they join forces to navigate customer problems before they happen, product can build better, support can serve better, and your organization can earn a reputation for being customer-centric, the ultimate in competitive edge.

5 Ways To Align Customer Service & Product



1

Streamline and standardize bug reporting

Bugs are more than an unavoidable part of doing business. They're a considerable source of tension between customer service and product.

As the folks on the frontlines, support wants bugs fixed as quickly as customers do, but on-the-job pressures frequently get in the way. From managing first-response times to obtaining the information needed to file a report, support reps remain stretched across multiple tabs and systems.

Product teams don't care about this when they receive mind-bending bug reports. They care about getting the information needed to replicate the problem. When support fails to deliver it, they push the issue back—usually to an overwhelmed agent who hoped they were clear enough the first time.

Whether the steps to reproduce are too vague, or there's two separate issues crammed into one ticket, too many support reps waste time writing bug reports the product team hates reading.

Here are two ways to solve it:

1

Re-configure your bug reporting tool

To produce bug reports the product team can act on quickly, support teams need a seamless process. Every input should be programmatic—like autocomplete drop-down menus—so that reps don't waste time thinking about what to enter where.

Manual data entry should only happen in one field: steps to reproduce. For added clarity, instruct reps to conclude each report with both an Expected result and an Actual result.

Consider investing in something more robust if your current tool can't connect with other systems or allow the flexibility to build reports around products or features.

2

Re-think product development resources

Product teams must balance bug and code management with new product development, which is no easy feat.

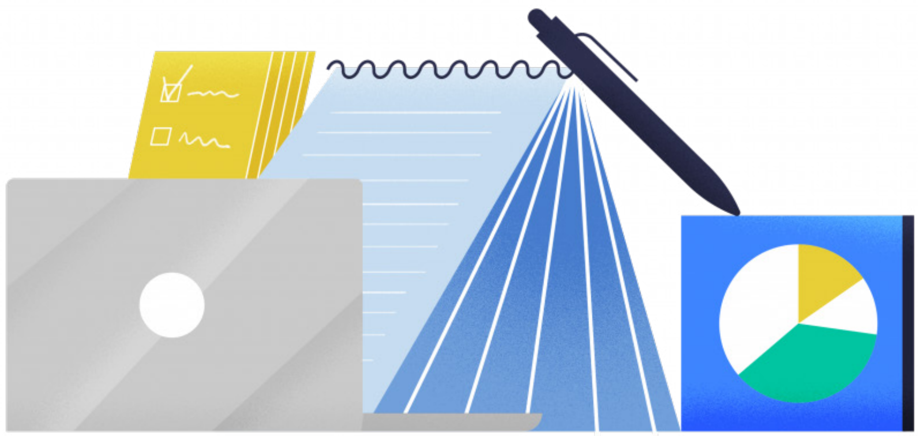
Some engineers view debugging as valuable experience that helps them grow into better developers. Others see the process as a time-consuming chore better left to junior employees. Then there's the folks who only enjoy the thrill of cracking something mysterious.

Your organization likely has all three on its product team. Depending on their backlog, they have a few options:

- Build sprints or releases that only target code stability and bug resolution
- Use a rotating schedule so everyone has a turn handling bugs for a predefined period
- Consider hiring a full-time QA engineer so someone's always on the hunt for defects

Products inevitably break in ways big and small. To reduce downtime for customers, every business should strive to resolve these issues as quickly as possible. To do so, they must reduce friction for employees first.

2



Encourage data driven feature requests

Feature requests can also foster tension between support and product.

Without visibility into big-picture goals, customer service reps can easily champion ideas about features they believe will make a huge impact—even when product knows better.

They may even frame their ideas as fully realized quick-fixes that product can “easily” address without realizing other dependencies.

For product teams, this lack of awareness breeds skepticism around support-driven feature requests. Left unchecked, they begin to see support’s feedback as anecdotal or too driven by emotion—and they can become dismissive as a result.

To shed these perceptions, customer service and product must align around what makes an irresistible feature request.

Here are two starting points:

1

Data

To get their requests taken seriously, customer service should validate their product recommendations with data as much as they can. There's a few ways to approach this:

- Track how many customers have asked about feature X within a time period
- Create a "product feedback" category for negative CSATs
- Use custom CRM fields or helpdesk tags to flag tickets with related products or features

Any of these options can help your support team identify which products or features create the most friction for customers. Attaching these data points to feature requests will help the product team understand the business case behind them.

2

Context that describes, not prescribes

Product development isn't just about adding new things. It's about identifying a customer's problem and devising elegant and holistic solutions.

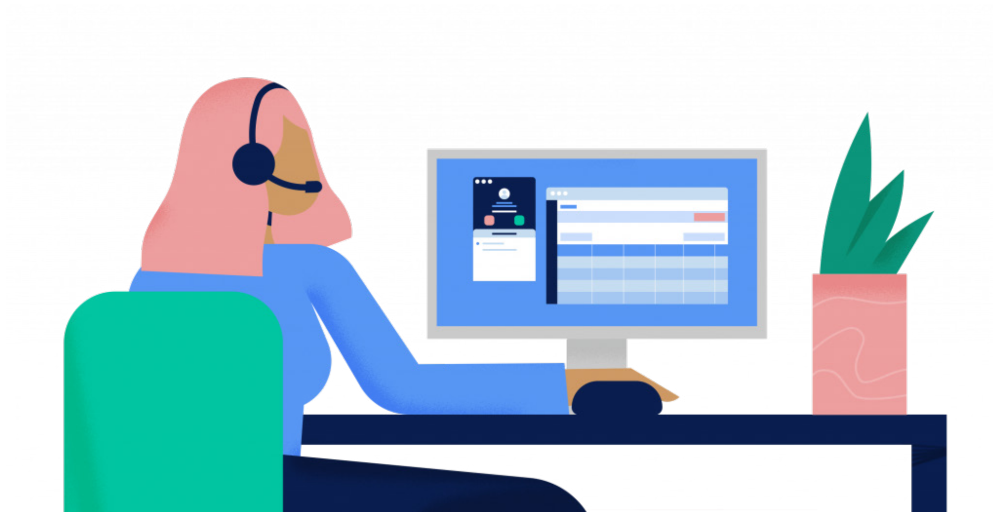
That's why product teams are more receptive to feature requests that describe the problem associated with an ask. They don't need support reps to prescribe a solution.

Here's the difference:

Descriptive	**Prescriptive**
As a user, I should be able to return to the app from the dashboard so that...	Put a 'Back to app' button on the dashboard

When support defines the problem rather than commanding a specific solution from product, it signals they understand there's more to consider than the immediate need at hand.

While support teams should never dictate product actions, they can and should use descriptive context to build recommendations that ideally reduce the volume of certain ticket types.



3

Choose a system for capturing feedback

How customer service curates feedback is just as important as the feedback itself.

For small teams, this usually starts in spreadsheets—maybe a Trello board if they're fancy—but if your team supports several high-profile enterprise clients or a global customer base, these makeshift methods can get messy fast.

No matter how hard your team strives to make them all-encompassing, it will be impossible for product—or support, for that matter—to grasp the full picture without toggling between several systems.

This may not seem like the end of the world, but it's not scalable or efficient. In their analysis of how innovative, high-performance organizations get ahead, Slack found they share three traits in common. Employees at these companies:

- Prefer user-friendly tools that foster open communication and provide the context for decisions
- Embrace innovation and the open platforms that make regular innovation possible
- Put customers first by equipping their teams with the best tools to do so

For an organization's customer service and product teams, this means investing in purpose-built software that not only captures product feedback, but can also quantify it and connect meaningfully with the systems these teams already use.

4

Build transparency with regular meetings

The best support reps know the product as well as the product team. In some cases, they may even know it better. It's what they don't know that hurts them—the bigger picture and all of its requisite complexities.

Regular meetings can solve for this. In addition to building rapport, they enable a company's customer service and product squads to build trust through transparency.

Here are a few ways to leverage support and product team meetings:

Train new agents on features and functionality

While your team can certainly train reps on how to perform certain actions, product can provide broader context into a product's origin, evolution to-date, vulnerabilities, and shortcomings—highly valuable context that new and existing reps can use to personalize their interactions and speak with authority.

When support reps understand a wide variety of use cases, they're better able to set customers up for success.

Provide clarity on product complexities

Some product features may be inherently complex, but customers expect support reps to be experts regardless. When they're not, your customers will react in one of two ways:

- **Assume your support reps are unprofessional or unprepared.** They'll also assume this is a reflection of how your entire company operates.
- **Assume your product is too difficult to use.** If employees struggle to understand it, they may believe they will, too.

They're also likely to leave the interaction confused and upset about devoting time to an unproductive conversation—especially if support provides inaccurate information.

By making it a priority to turn support reps into bonafide product experts, organizations can ensure meaningful, quality service.

Get ahead of support documentation

As a product evolves, support must do more than learn new features and functionality. They're also on the hook for creating and updating FAQs, email macros, and any other messaging they use to educate and inform customers.

Meeting regularly with product to discuss the product roadmap and coming updates enables customer service to get the information (and screenshots) needed to get a leg up on support content.

School product on adoption and trends

Product teams may have their own means of identifying user engagement, but the qualitative feedback support can provide them with can pack a greater punch than numbers alone.

Customer service reps can share data about which products generate the most questions or confusion, what sorts of questions customers ask, and what feedback they've volunteered.

Given the opportunity, product can ask questions about feedback and gauge how to prioritize feature requests with respect to their roadmap.

5

Involve support in new product development

Consumers have ample options. If you need a ride, you could hail a cab on the street, but you could also use Uber or Lyft to pre-arrange a pickup. Need a help desk? There's Zendesk, Freshdesk, HelpScout, and HappyFox, to name a few.

With so many businesses banking on similar solutions, true product differentiation is the stuff of unicorns. For most companies, increasing their focus on customer service is enough of a competitive edge.

But when organizations promote customer experience initiatives, they often overlook the relationship between product design and customer service. Worse, they rarely involve support in the design process.

According to several studies, these businesses miss out big time.

The most innovative companies acknowledge the relationship between a customer's "cost of ownership" and a product's "serviceability."

Low cost of ownership for customers	High serviceability for business
Product is intuitive and easy to use Product satisfies obvious needs and delivers on needs they may not have anticipated	Fewer support tickets and less hand-holding Customers more likely to share praise and "nice to have" feedback that inspires and informs product team decision-making

Organizations that don't regard customer service as crucial to the product design process usually face very different circumstances:

High cost of ownership for customers	Low serviceability for businesses
Product "too hard" or confusing to use Product too often fails to "do its job"	Support struggles to help customers achieve their goals. Product struggles to create or maintain the solutions customers need

When product teams make use of support insights before building or scoping new features, they're able to design for real needs instead of perceived ones.

Products consciously designed for ease of use often stand out as an obvious choice in a sea of options. Like the original iPhone, they may even help to redefine what customers expect from a product.

Key takeaways

The goal of customer service and product alignment isn't just to build a better product, but to build a better relationship between teams. To get there, both teams must do the work.

To help at the organizational level:

- Provide integrated, user-friendly tools for both teams to communicate
- Close product knowledge gaps with ongoing training
- Open the door to the product roadmap so support is always prepared
- Share customer data to help the product team make customer-centric decisions

Final thoughts

In a crowded and increasingly competitive landscape, being customer-centric is no longer an option, it's an imperative. Companies that align their support teams with key departments stand a much better shot at providing the seamless experiences today's customers crave.

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For more insights into the issues support leaders care about the most:

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