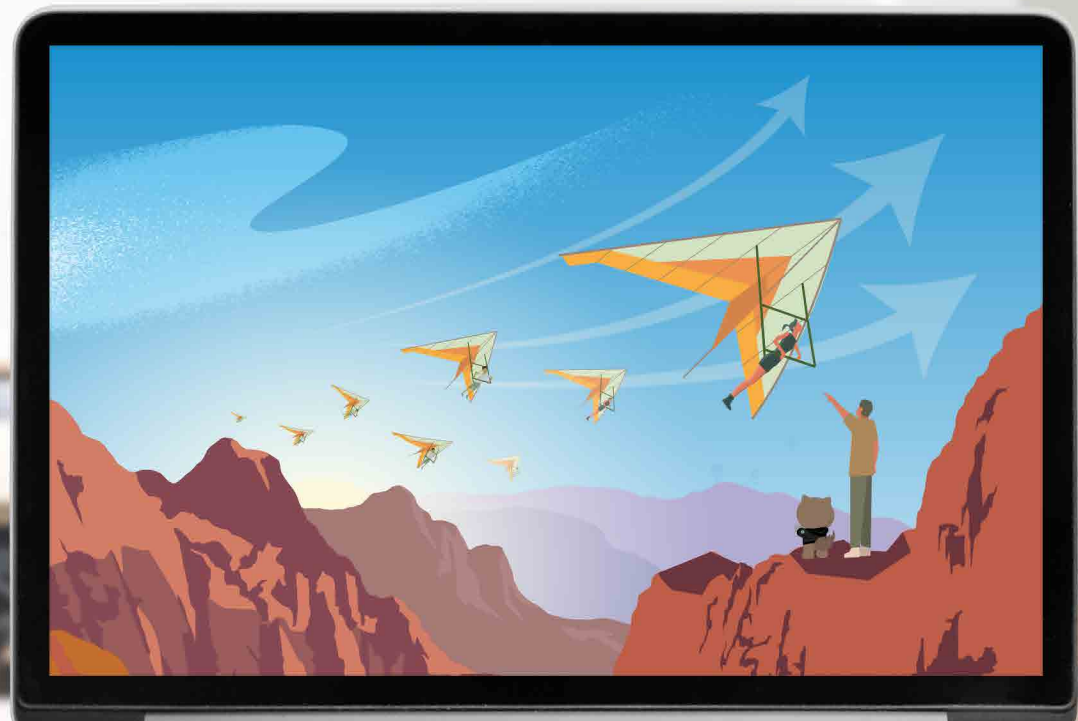


THE STARTUP'S GUIDE TO

# CUSTOMER SERVICE

salesforce

Reach new heights with advice  
from 8 successful startups



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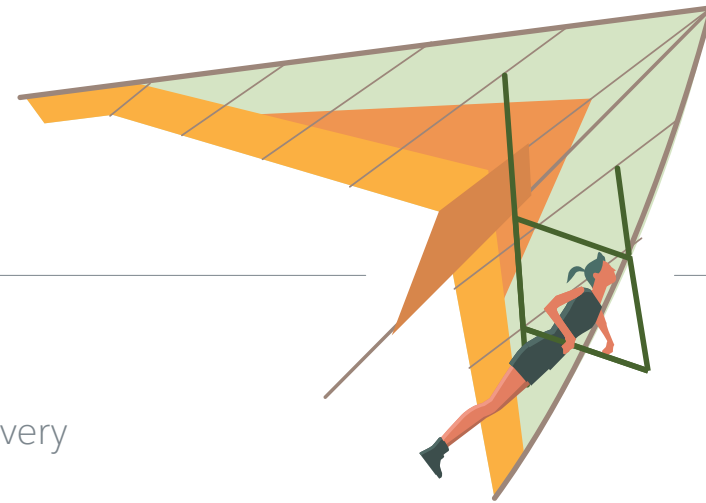
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## INTRODUCTION

# Grow your small business with customer service

*It's hardly surprising that half of small businesses fail within the first 1-5 years. It's not easy to launch a new product, single-handedly manage everything from IT to accounting, fend off the competition, and grow a customer base – all at the same time. A great concept, capital, and passionate employees can only get you so far. Offering awesome customer service often makes the difference between a startup that takes off and a business that plateaus. Here are eight ways customer support can help you beat the competition and grow your business faster.*

## MEET ASTRO AND FRIENDS!

They're here to help guide you through the great outdoors (and this e-book) in the spirit of fun, adventure, and exploration. Why? Because that's what Salesforce is all about – empowering people to blaze their own trails and being part of something greater.

If you want to know more, check out Trailhead, the fun way to learn about Salesforce. Get started today at [salesforce.com/trailhead](https://salesforce.com/trailhead).



## MEET THE EXPERTS

# Learn from eight of today's most successful growing businesses

*Fast, helpful customer service is table stakes in today's business world. Learn from eight of today's most successful growing businesses how to optimize your customer service operations so you can grow your business faster than ever.*



Tools to help businesses manage tasks and projects more productively

Founded in 2008



Hospitality management software for hoteliers

Founded in 2009



Web-based interface for building advanced forms

Founded in 2006



Automated lending platform for small businesses and consumers

Founded in 2008



Global retailer that lets consumers design their own shoes

Founded in 2009



Switzerland's regionally, digitally and innovative online marketplace

Founded in 2015



Advanced media player live on 2+ million sites

Founded in 2007



Integration platform to connect and infuse artificial intelligence into any business process

Founded in 2003

## SUCCESSFUL STARTUP ADVICE #1

# Make customer support part of your DNA

*Making sure customers are taken care 24/7 shouldn't just be your support team's responsibility. Everyone in your company – from the CEO to the receptionist – should play an important role in helping customers. Some startups train new employees in customer service as part of their onboarding process. Not only does time on the front lines help new employees learn about products and customers more quickly, it also ensures they'll always keep customers at the center of everything they do.*



### HOW IMPORTANT IS IT FOR A STARTUP TO MAKE CUSTOMER SERVICE PART OF ITS DNA?

It's really important to have as many people interact with customers as possible. Not only does it make our support process more efficient, even in times of extraordinary growth, but it gives us the feedback we need to make a better product. It's so important that our support team has always played a major

**“It's really important to have as many people interact with customers as possible.”**

role in helping to drive product strategy. We keep our product management counterparts updated on the latest feedback to make sure Asana is always building features and products that customers actually want.

### WHAT'S THE BEST WAY TO RALLY YOUR COMPANY AROUND CUSTOMERS?

Don't silo customer support as a company cost center. A great sign of superior service is when it is integrated as a mindset across. At every all-hands meeting we share information about new customers, success stories, and a snapshot of any outstanding issues or trends.

### WHAT ADVICE DO YOU HAVE FOR NEW STARTUPS THAT WANT TO PUT CUSTOMERS AT THE CENTER OF EVERYTHING THEY DO?

We truly believe that everyone in the company benefits tremendously from ongoing, hands-on experience with the product and our customers. Start by hiring people who are passionate about solving problems and educating customers. Then make customer service a team responsibility, starting in the new hire onboarding process and continuing on a regular basis.

#### **Brian Boroff**

*Head of Customer Success and User Operations*

[Learn more about Asana >](#)

## SUCCESSFUL STARTUP ADVICE #2

# Build a customer support dream team

*When your company is big enough to hire dedicated agents, you need to make sure you hire the right ones. After all, you can train on the product and on the tools, but you can't teach the desire to help people. Before you build your team, think about what's most important to you. Some growing businesses prize good writing skills more than anything. Others want a great phone presence. Whatever's important to you, make sure they're energetic, caring people who want to help customers.*

## REVINATE

### HOW IMPORTANT TO YOUR BUSINESS IS HAVING THE RIGHT SUPPORT TEAM?

It's absolutely critical. Revinate is driven by customer success, so it's important that when customers contact our support team, they receive highly satisfactory answers to their questions quickly. Our support team reps are product experts and act as the face of Revinate.

### WHAT DO YOU LOOK FOR ON A CANDIDATE'S RESUME?

There are a few must-haves. First, upward mobility within a support organization – like going from front-line support to a higher-level escalation level. Second, an eagerness to learn, or showing that they've proactively learned new skills on or off the job to help them be even more successful in their roles. Third, a team mentality – not just silo'd answering tickets, but working with Customer Success Managers and others on the team to collaborate and find answers. Fourth is problem solving. Not everything has an easy answer, and sometimes it's difficult to just figure out what the customer needs help with based on what

they've written in their support ticket. And finally, everyone on our team must love making customers happy and helping others.

### WHAT'S YOUR ADVICE TO A STARTUP THAT WANTS TO BUILD A CUSTOMER SUPPORT DREAM TEAM?

First, share information. Make sure no one person is the holder of all knowledge. Consistent and regular internal training and sharing of data is key. Second, get involved with the product team. Look for trends in types of tickets you're getting to see where you can add efficiencies and enhance the platform to help reduce and deflect tickets. Make sure the product team has plenty of visibility into what comes through support to help drive strategy. And third, make sure everyone in support feels empowered. There are many ways to do this, like encouraging them to suggest product enhancements and participate in product testing or letting them blog on service topics.

### Linden Plumley

Director of Global Customer Support

[Learn more about Revinate >](#)





### SUCCESSFUL STARTUP ADVICE #3

## Choose the right customer service solution.

*Many young companies start out by managing customer service through email, but all too often that system doesn't scale. Messages are lost. Multiple people respond to the same questions, sometimes with different answers. And while folders can help categorize requests, they don't give you a way to assign emails to agents, show a priority level, or run reports. Implementing a customer service solution early in your company's lifecycle can have huge benefits later. Look for a solution that's cost effective, easy to implement, and can grow with your business.*

## Formstack

### HOW IMPORTANT IS HAVING A CUSTOMER SUPPORT SOLUTION TO YOUR BUSINESS?

Having a customer support solution isn't so much a matter of importance as it is a matter of necessity. It's absolutely essential to have a solution that's efficient and easy to use, both internally and for our users. Our goal is to provide inspired software, so our customer experience and support solution must inspire as well.

**“Having a customer support solution isn't so much a matter of importance as it is a matter of necessity.”**

### WHAT ARE THE MOST IMPORTANT THINGS TO LOOK FOR WHEN EVALUATING A SOLUTION?

The initial question is, “Can this solution make us better for our customers?” We want to know if a solution has the tools and features to help us improve response times and the quality of those responses, as well as provide an easy-to-use help center and make the customer-

facing experience effortless. Scalability is also important. We have a fast growing user-base, so it is encouraging to know our solution can grow with us. It's also important to have a tool that our team will want to use.

### WHAT DO YOU KNOW NOW THAT YOU'D WISH YOU'D KNOWN WHEN YOU WERE STARTING OUT?

Before you dive into a solution it's important to take a step back and think about what features you need to be successful. There are a lot of support options available, and you need to be sure that you are getting the ones that will move the needle for your business. Through this process we learned what's essential for us to operate, as well as what's important for ticket handling, our help center, and reporting capabilities.

### **Duane Hunt**

*Vice President, Operations*

[Learn more about Formstack >](#)

#### SUCCESSFUL STARTUP ADVICE #4

## Have screaming-fast response times.

*Remember back in the 1990s when you had to call a company between 9-5 Eastern Standard Time to get help? Today even small companies need to offer self-service so customers can find the answers they need 24/7. But sometimes customers still need to reach a real person – and they want to reach that real person fast. It's important to have a customer service solution that's both easy to use and optimized for mobile so you have screaming-fast response times, even during the middle of the night or on the weekend.*



#### HOW IMPORTANT ARE RESPONSE TIMES TO YOUR BUSINESS?

Response times are our business. It's our job to make sure our customers receive fast, accurate answers to their inquiries. So when assigning tasks, responding to customer inquiries is second only to answering customer calls.

**“It’s our job to make sure our customers receive fast, accurate answers to their inquiries.”**

Each representative knows the importance of responding in a timely manner and ensuring that calls are triaged based on both inquiry type and when they were received. With Salesforce, we can constantly track customer interactions and needs.

#### WHAT'S YOUR AVERAGE RESPONSE TIME?

Our goal is for a less than 2-hour turnaround on inquiries that do not require further investigation, and approximately 24 hours for inquiries that do trigger a need for further investigation, especially if we must forward the issue to another department. Salesforce will alert the customer service reps, as well as their supervisors, when a ticket is in danger of falling outside of the SLAs. In some cases this occurs while waiting on a response from the customer.

#### HOW DO YOU KEEP RESPONSE TIMES SO FAST?

Simple: We do it by making response times to customer inquiries an understood top priority for our team. We constantly monitor our inbound emails, as well as inquiries to individual Customer Service Reps, to make sure no customer is waiting beyond what's defined in our Service Level Agreement. Salesforce is vital to helping us monitor and keep track of customer inquiries and response times.

**Carolyn Hinson**

*Customer Service Supervisor*

[Learn more about Kabbage >](#)





## SUCCESSFUL STARTUP ADVICE #5

# Personalize every response.

*No one likes to get a canned response. Whether your customer is your mother-in-law or a Fortune 500 company, everyone wants to know that they're heard and that you care about their needs. Support is often an untapped channel for creating a closer connection to customers and for building a unique brand personality. Some of the most successful startups blend standard responses with personalized communications. You can build your brand personality and strengthen relationships with every correspondence.*

**“Every customer should feel heard, valued and confident.”**

## SHOES OF PREY

### HOW IMPORTANT IT IS IT TO YOUR BUSINESS TO GIVE CUSTOMERS PERSONALIZED RESPONSES?

Most see customization as a service for special occasion and mass-production as the norm. We believe mass customization is the future of retail and we intend to be pioneers in this movement that will change the way people shop forever. This means essentially asking our customers to commit to a product they've formed a personal connection to, but have never seen in reality. Customer confidence is the biggest roadblock and our greatest tool to break down that barrier is offering a service as personalized as the product. Every customer should feel heard, valued, and confident.

### HOW DO YOU ENCOURAGE AGENTS TO GIVE RESPONSES PERSONALITY?

We integrated our customer support tool with our customer order system so all of our employees can have immediate visibility to historical order and payment information in order to provide totally

personalized service. Everyone in the company from the management team to retail associates to engineering has access to the tool so they can quickly take a pulse on the business and be knowledgeable when helping customers during busy times.

### WHAT ADVICE DO YOU HAVE FOR COMPANIES THAT ARE JUST STARTING OUT AND WANT TO MAKE SURE THEIR SUPPORT REINFORCES THEIR BRAND?

You need to have a strong brand from day one of your company, and you need to reinforce it with everything you do. Identify early what your “north star” metric is – the metric that drives decisions across all departments – then let data drive your scaling efforts. This means ensuring every process is geared towards empowering your staff to keep your finger easily on the pulse and respond quickly, appropriately, and in a way that does your company proud.

#### **Dione David**

*Customer Happiness Manager*

[Learn more about Shoes of Prey >](#)

## SUCCESSFUL STARTUP ADVICE #6

# Explore different ways to measure success.

*Although many companies evaluate agents based on what percentage of cases they can close after the first email or phone call, or how quickly they can close them, you might want to consider other ways to measure the success of your support team. What if you encourage your agents to spend time with customers? Will they become more loyal? Will they be more likely to recommend your company to others? Successful startups like siroop are using non-traditional measurements to ensure their teams are driving toward success.*

**“Close, personal customer contact is the only way to differentiate companies and products in today’s complex world.”**

## siroop

### **WHY HAVE YOU CHOSEN NON-TRADITIONAL ANALYTICS TO MEASURE YOUR SERVICE TEAM?**

At siroop, quality of service is important, so we want to have as much close, personal contact with our customers as possible. This is the only way to differentiate companies and products in such a complex world. So while we do use some traditional measurements, our main KPIs are unique to our company and service goals. Not only do we measure the net promoter score (NPS) directly after a checkout, but also three weeks after buying. At that point the customers may have experienced customer service contact and are able to evaluate the whole experience.

### **HOW DO YOU MEASURE YOUR SERVICE AGENTS?**

After each incident we send an automated email to the customer with a few questions to gauge the customer service NPS and customer happiness score. This gives us a high level indication of how the customer rates us after an incident. We also ask about individual agent qualities like friendliness,

“know how”, and response times. For incoming calls we take the service level (customer waiting time) as indicator and try to achieve very high availability rates.

### **SINCE YOU’RE NOT MEASURING CLOSE TIMES, HOW DO YOU KEEP CUSTOMER SERVICE COSTS DOWN?**

We want our customers to choose his or her preferred way to get in touch with us. In addition to email, phone, and social channels like Twitter and Facebook, we offer chat and WhatsApp as support channels.. To keep costs down, we use Service Cloud and Sales Cloud functionality, like generating auto-reports for our merchants so they can see in real time the issues the customers have had with their delivery processes. Our self-service portal and an intelligent interactive voice response system (IVR) also help to save costs Plus, we try to automate as much as possible; when a call comes in (via the Talkdesk plugin) an incident ticket is opened automatically and filled out with contact data. It’s efficient and saves us money.

### **Thomas Staudte**

*Head of Customer Service & Social Media*

[Learn more about siroop AG >](#)

## SUCCESSFUL STARTUP ADVICE #7

# Use customer service to guide product strategy.

*Many startups spend a lot of time and money building products that ultimately customers don't want. Remember Pepsi A.M.? Heinz E-Z Squirt purple ketchup? Microsoft Zune? Your customer support team talks to your users every day. They can be your best source for feedback and a key driver of product innovation. They can tell you what modifications and features customers would like to see in your product. They can help you understand how customers interact with your product and track trends over time.*



### HOW IMPORTANT IS CUSTOMER SERVICE IN HELPING YOU BE SURE YOU'RE PRIORITIZING THE PRODUCTS AND FEATURES YOUR CUSTOMERS REALLY WANT?

Customer feedback is definitely one of the biggest drivers for our product roadmap. Our product has so many features and is so broadly used that we need to be very methodical about how we plan upcoming changes and additions. Customer service is key to helping us see how our product is being used, what could be better, and where to invest our development time so we're always working on the things that will do the most to move the needle.

### WHAT'S THE MOST EFFECTIVE WAY TO BRING CUSTOMER SERVICE INTO THE FEEDBACK LOOP?

Witnessing your product from a customer's perspective is incredibly powerful. Since we can get immediate feedback, label it, and track it, we're able to catch either small site issues or

demand for new functionality. We share this feedback immediately between our customer service, product, and operations teams so everyone is on the same page and we keep customers at the center of everything we do.

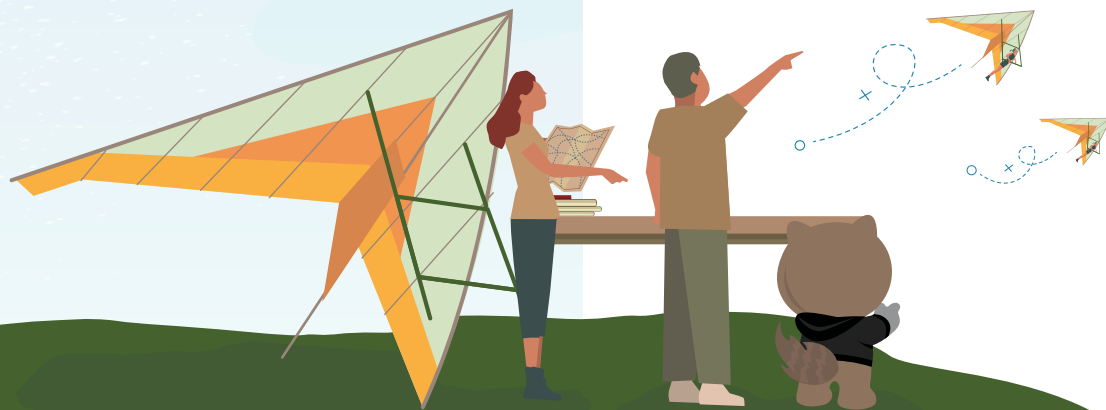
### WHAT'S YOUR ADVICE FOR COMPANIES THAT ARE JUST STARTING OUT ON MAKING CUSTOMER SERVICE A PART OF YOUR PRODUCT STRATEGY?

Listen to your customers. These are the people who are buying your product and often have their ears closest to the ground of the industry. Likewise, tracking repeated asks over time is a great way to see upcoming momentum in a particular area. If you get 5 people requesting a particular feature in one month, 10 people the next month, and then 20 people the following month, you should probably start paying attention. If you make this part of your process from day 1, you'll have a much better chance of building the products customers really want.

**Andrew Prelusky**

*Client Engineer*

[Learn more about JW Player >](#)



## SUCCESSFUL STARTUP ADVICE #8

# Connect customer service to all your apps and systems.

*Every aspect of a business is interconnected, but all too often companies develop islands of siloed data as they grow. If you start out by connecting all the apps you use to run your business, you can be more productive in every way and grow even faster – and you'll avoid costly integration projects later on. Sharing customer information, product data, and support metrics across your entire company gives everyone more insight into customers; then they can sell more, service faster, and deliver an outstanding experience every time.*



### HOW IMPORTANT IS CONNECTING CUSTOMER SERVICE TO YOUR OTHER BACK OFFICE SYSTEMS?

I'd say it's vital. Jitterbit won a [Bronze Stevie Award](#) for Customer Service Department of the Year, and our integrations were instrumental in achieving that kind of productivity. We grew the CS team by 230% in 2016 and didn't miss a single SLA. Connecting customer service to other back office systems is critical to achieving our 360-degree view of the customer. That, in turn, gives us complete real-time analytics, which helps us make decisions faster, uncover insights into customer issues, and improve both employee productivity and customer satisfaction.

### WHAT INTEGRATIONS DO YOU HAVE AND WHAT KIND OF INSIGHTS DO THEY GIVE YOU?

Jitterbit integrates detailed information from our own iPaaS platform about our end-customer's use of Jitterbit, including the number and nature of their integrations and APIs. This helps us understand our customers' businesses and experiences with the Jitterbit platform so we can make

recommendations that help them get more value. What this boils down to is that these integrations help us increase customer satisfaction and retention.

### DO YOU HAVE ANY ADVICE FOR COMPANIES JUST STARTING OUT ON CONNECTING CUSTOMER SERVICE TO OTHER APPS?

Nearly every business we talk to is adopting some kind of a cloud or API strategy to become more agile and execute more effectively. It's important to establish a modern API and Cloud integration strategy from the beginning so you can provide an elevated customer experience, stay ahead of your competition, and provide a higher level of employee productivity, retention, and satisfaction. Doing this as you're just starting out will definitely make it easier to reap the benefits down the road.

**Dan Moore**

*SVP of Client Services*

[Learn more about Jitterbit >](#)

# 38%

faster decision making

# 25%

increase in revenue

# 35%

jump in customer satisfaction

## CONCLUSION

### Your partner in growth: Salesforce

*Salesforce helps you find customers, win their business, and keep them happy so you can grow faster than ever. With Salesforce's out-of-the-box solutions, small and midsize businesses can easily implement cutting-edge technology and connect everything they use to run their businesses. On average, customers using Salesforce have seen a 38% faster decision making, a 25% increase in revenue, and a 35% jump in customer satisfaction.\**

To learn more about how Salesforce can help your business, visit: [www.salesforce.com/smb](http://www.salesforce.com/smb) or contact us today

LEARN MORE

CONTACT US

\* Average percentage improvements reported by Salesforce customers. (Source: Salesforce Customer Relationship Survey conducted 2014-2016 among 10,500+ customers)







salesforce

CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY

