Support Customers –

A Requirements Checklist

# Feature Overview

Before, during, and after receiving a new order and fulfilling the order, a customer may require support. Support can range from questions about a product or service to addressing issues with a product or service that has already been received. This feature covers the process of receiving a customer support request, being sure the most appropriate person addresses the request, and managing the process of resolving requests.

**Analysis Tip**

Customer service is probably one of the most commonly overlooked areas of a project. So much effort is invested in building new products and getting them live, that we forget to think about how we’ll service those products throughout their entire lifecycle. As the BA, you may need to use influence to help guide stakeholders in seeing the need to talk through these requirements sooner rather than later.

# Common Applications

* **Amazon** – Using Amazon’s online system, a customer is able to initiate specific types of requests, such as returning or replacing items.
* **Zappos –** This online shoe retailer is known for its customer support, free shipping, and lenient return policy. They handle requests online or over the phone.
* **Vanguard** – Vanguard, a financial services company, provides a toll-free phone number for customers to call and get support for their account. Vanguard also provides a secure online contact form and messaging system through its website, which helps protect its customer’s sensitive financial information.
* **Google –** Try to get in touch with Google – it’s pretty hard, even if you are a content provider or advertiser. Part of the reason they can scale is most of their products are self-service and customer support is provided in the way of online documentation.
* **Target –** Like most retailers, Target has a specific desk to provide customer service. At this desk, buyers can return or exchange purchased items.

# Business Benefits

Customer service can be a differentiator between different organizations providing similar types of products and services. Improvements to the degree or effectiveness of support provided can help secure loyal customers and repeat purchasers. At the same time, customer service is a time-intensive and often manual activity, and introducing technology to make the process more efficient is often necessary to provide best-in-class service.

* **Brand Awareness** – The internet has made it possible for customers to share their opinions of bad service on their personal social media profiles (such as Facebook and Twitter) as well as on various online review sites. Ineffective service can lead to a negative brand image. While raving about positive service is a less frequent activity, providing best-in-class service can be a significant part of an organization’s brand over time.
* **Increased Revenue** – Efficient, effective, and friendly customer service can lead to loyal customers and repeat purchasers.
* **Increased Efficiency** – Introducing technology to support customer service professionals can increase how quickly they are able to triage, route, and respond to customer requests. This leads to a better customer experience as well as the ability to scale to handle more customers.
* **Minimize Costs** – Automation efforts can minimize the costs of providing service. Online help documentation and easy-to-use websites and products can reduce the number of emails and calls asking common questions as customers are able to help themselves.

# Key Concepts

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| Term | Definition |
| Customer Support Request | A question, issue, or demand presented to an organization for resolution. |
| Requestor | The individual (or contact) who initiates a customer support request. |
| Customer | An individual or organization that provides monetary value (or another form of value) in exchange for a product or service. Often also used to refer to an individual or organization who *may* purchase a product or service or who *has* purchased a product or service in the past. |

# Requirements Questions

## What Is the Scope of Your Customer Service?

Customer service is an area of your organization that can quickly grow to include many activities. It’s important to define the scope of the service you can provide.

* Who do you provide service to? Options include:
	+ People who are interested in learning more about your products and services but have not yet purchased a product. (In some organizations, this happens as part of the sales process and is not in scope for customer service: *See Purchase Product or Service.*)
	+ Near-buyers who are in the middle of a sales transaction, such as checking out in your online shopping cart or with a cashier at a physical retailer. (Consider the scenario at the grocery store when you realize one of your eggs is broken as you are about to buy the carton. Some retailers will get you a new carton before you leave the store.)
	+ Buyers who are in the fulfillment process for a product or service. This could be a buyer who is waiting for their product to be manufactured and shipped, or a course participant who is part of an active course session.
	+ Recent Buyers who have completed the fulfillment process but have issues with the product or service. For example, the shoes you receive from Zappos may not be the right color or size. Or you could discover a new issue with the website design you commissioned.
	+ Previous Buyers who completed the fulfillment process a significant time in the past. (Your organization will need to determine where to draw the line between recent and previous buyers.)
* What types of customer support requests can you handle? (The types of requests might be specific to each Product or Service you offer.) Common examples include:
	+ Returns
	+ Exchanges
	+ Extensions
	+ Payment issues
	+ Troubleshooting/Fixes
	+ Outages
	+ Questions
	+ Estimates
* What types of customer support requests will you not handle? Consider the options above. It can also be helpful to consider some extreme examples that are beyond customer support (but may need to be handled through a separate escalation process). Here are some potential scenarios:
	+ A visitor in your store slips and falls and can’t get up.
	+ A customer is irate with a cashier about the price of an item and refuses to pay or move.
	+ A customer is irate about their credit card being declined.
	+ An online visitor leaves an inappropriate comment.
	+ An online visitor attempts to sabotage the shopping cart.
	+ An angry recent buyer uses inappropriate language to complain about the product they received.
* How do you receive requests? Options include:
	+ Email
	+ Phone
	+ In Person – anywhere or at a specified place?
	+ Instant Message
	+ Online Contact Form

*See Communicate with Contacts.*

* What days and times do you provide live customer support?
* For asynchronous communication mechanisms, what is your promised turn-around time for customer support requests? Does the turn-around time vary by the type of request?
* What kind of security is required for internal staff to provide customer service? Common options include:
	+ None.
	+ Requestor confirms identifying information associating them with an account (such as name, address, and last 4 digits of their social security number). *See Manage Users and Permissions*.
	+ Requestor has specific permissions within their account. *See Manage Users and Permissions*.
* Can buyers purchase any special or premium customer support? Examples include:
	+ Faster turn-around times on requests (or service level agreements).
	+ Direct contact or email support.
	+ A certain number of issues/fixes.
	+ Unlimited questions.

*See Purchase Product or Service*. (In this case, extra customer support would be a service.)

## How Are New Customer Service Requests Triaged and Routed?

* How is the type of request identified?
* Does the type of request need to be validated?
* Do any types of requests need to be escalated to different people or groups?
* Is it possible that requests are received by individuals who are not eligible for support? If so, how are these requests responded to or handled (if at all)?
* For each type of request, who in your organization is qualified to address the request?
* For each method of receiving a request, who in your organization is available to handle this type of request?
* How does the request get routed to the person who can handle the request?
* Is a request routed to an individual person or a group of people?
* If an individual, what happens if that individual is not available? Or not available for a period of time?
* If a group of people, how does an individual select to handle a request?

## How Are Requests Addressed?

For each type of request, consider the following questions:

* What criteria are used to determine that the request is fully addressed?
* Must all requests be resolve successfully or are there situations in which an unsuccessful resolution would result in a complete request?
* What needs to be done to resolve the request?
* What communication happens with the requestor?
* Who is responsible for each type of communication? (“Who” in this case may be a system, as some of this communication may be automated.)
* What information does an individual need at hand to resolve the request? How will they access this information? (For example, some organizations provide binders with scripts to handle different scenarios. Others provide detailed catalogs of product information and service offerings.) *See Present Information.*
* Is there anyone else who needs to know about the request or the results of a request? (For example, if an individual employee reports an issue with their laptop, a manager at that organization may need to be aware of the issue.)
* Once a request is addressed, how is the result documented?
* Does the initiator of the request need to approve or validate that the request has been addressed satisfactorily?
* There may be scenarios where the initiator of the request is responsible for the next step. In those cases, is there any follow-up? If so, consider the following questions:
	+ Who is responsible for it?
	+ What is the timing of the follow-up?
	+ How is the follow-up conducted?
	+ At what point is follow-up suspended?
	+ What happens if all follow-ups are complete and the issue is not addressed?

*See Communicate with Contacts*.

## How Are Requests Monitored?

In many cases, incoming support requests need to be monitored to ensure they are being satisfactorily addressed. Consider the following questions:

* How often are incoming requests monitored?
* What metrics are used for monitoring requests? Options include:
	+ Aging (length of time since request was received, typically looked at for unresolved requests)
	+ Severity of Requests
	+ Type of Request
	+ Response time (time between receiving the request and time it was addressed or the time between receiving the request and the first response)

*See Create Report.*

* What happens when requests are not dealt with according to the scope of service your organization has agreed to provide? (Some organizations provide daily or hourly management reports for review and follow-up. Others escalate individual issues to management as they exceed stated response times.)
* Who is responsible for reviewing and handling escalated requests? What actions will they take to handle the request?

## How Can Customers Service Themselves?

Providing help documentation, whether it’s online or in printed form, can help potential customers answer questions about the products they are interested in and help recent or past customers resolve their own issues.

For more information about creating a searchable repository of information, *See Search for Information* and *Present Information.*

Consider the following questions that are specific to customer support documentation:

* How does an individual know how to get in contact with your customer support organization? Consider the following examples:
	+ Website FAQ or Contact Us page
	+ Customer support email and/or phone number on a receipt or packaging.
	+ Instant message pop-up box for website visitors.
	+ Clear signage over a service desk at a store.
* What customer support questions or issues does your organization receive most frequently?
* For each question or issue, where does it surface in your purchasing or fulfillment process?
* What can you do in the steps preceding where the issue tends to surface to pre-empt the request? Consider the following examples:
	+ Send an email with frequently asked questions about your products and services to those who have expressed an interest in buying.
	+ Collect make and model information for any integrated components. Send an instruction manual with directions for the buyer’s set-up.
	+ Include instructions for returning a product on the receipt or with the packaging.
* What questions do you wish your potential customers were asking before they purchased your product or service? How can you share relevant information related to those questions? (For example, a company might receive returns on a printer because it only works with specific software or a specific type of computer. Addressing this question up front via an information sheet could reduce returns.)
* What questions do you wish your customers were asking so that they could get the most value from their product or service? How can you share relevant information related to those questions?

# The Most Important Thing

More than anything, people want to feel valued and respected. Even if your organization cannot provide an expansive scope of customer service, you can be clear about how you handle different types of requests. And if your organization does provide extensive customer support, be sure you are clearly communicating the value of your offering to your customers as that’s what gets you the repeat business and loyalty you deserve.

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