

The Art and Craft of Online Service

40 thoughts for customer-centric companies



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Introduction

Customer service is very simple: Your customer tells you what they need, and you do it for them. It's not rocket science. Rocket science has rules, formulas, calculations that are testable and measurable, and shiny metal pieces that fit together perfectly.

Customer service is less complex but much messier, more organic, and amorphous. Customers live on a biological — not geological — time scale, and individual customers (and service professionals) may respond differently from day to day based on their location, mood, or choice of footwear.

Technology can certainly help. Help desk software, knowledge base tools, workflow automation, machine learning, and AI — all of them can be thoughtfully applied to reduce effort and improve consistency of service.

What technology *cannot* do is care. It cannot care about why customers are running into problems or why they cannot understand the answer they've received. It cannot care about all the endless, tiny improvements that turn acceptable into outstanding.

It takes a person to care — someone like you. That's probably why you're reading a collection of essays about customer service and experience. These essays are all taken from [The Supportive Weekly](#), a free email newsletter from Help Scout.

If you read something here that makes you think or that makes you feel, I would love to hear from you. Email yourfriends@helpscout.com any time.



Mat Patterson

Help Scout

Facing Feelings

“Feelings can’t be ignored, no matter
how unjust or ungrateful they seem.”

— ANNE FRANK

Satisfaction (I can get some)

Three things I find intensely satisfying in no particular order:¹

1. The orderly neatness of a freshly mowed lawn.
2. Watching clean lines appear beneath the nozzle of the power washer.
3. Closing my sliding door in one push with the perfect amount of force so it just kisses the door frame almost silently.

Satisfaction in this sense is felt in the gut. It's a deep feeling that things are, finally, as they should be. It is not the limp, pallid, "I guess it was fine" sort of satisfaction — the type that is often my response to CSAT surveys.

Of course I don't need every business interaction to be an emotional experience. Reliable competence is enough to stand out in most business markets.

There is actually not a ton of reliable evidence that customers will leave a company with consistently decent service for a company with "excellent" service, even if they say they will. It is, however, easy to measure people explicitly leaving due to bad service.

Customer satisfaction surveys are a very blunt tool for measuring a very fine-grained range of customer experiences. The person just having a good day, the person who really loves your product, and the person who genuinely had an excellent customer service interaction are all counted in exactly the same way.

That doesn't make [CSAT surveys](#) useless, it just means watching the trends and using the results carefully (in conjunction with [other metrics](#) and [quality measures](#)).

Before you worry about "delight" or "wow moments," make sure you are delivering consistently competent customer service.

Read more:

- [A Comprehensive Guide to Customer Satisfaction Score](#)
- [How to Inspire, Measure, and Improve Customer Loyalty](#)
- [How to Measure Customer Service Quality: Methods & Tools](#)

¹ Your list may differ.

Two conversations diverged in a busy queue

Some chat tools (though not Beacon) immediately show anything you type to the person on the other end, even before you press send. I've heard from people who've seen everything from accidentally-pasted personal information to outright sexism and misogyny.

In most cases the customer decided better, frantically backspacing their way into a more appropriate response. They never knew it was too late and that they'd already been revealed.

It's a bad situation all around, especially for the service professional who is still required to provide assistance.¹ It's not always about causing deliberate offense — many of us need a few attempts to craft a coherent sentence.²

A great benefit of written customer service communication is having time to process any instinctive reaction of frustration or confusion and still respond with empathy and clarity.

Sometimes people recommend writing down your true feelings in a letter but not mailing it. Using your help desk or email client in this way is A Very Bad Idea.³

So what do we do with those feelings instead? Should we vent them to our colleagues? Maybe chat with a sentient-seeming conversational AI therapist or a GPT-3-powered, complaint-absorbing bot?

Very often it's the things left unsaid that make for a productive and helpful conversation. (Although if the many worlds theory is true, somewhere out there is a universe in which you did give voice to your baser instincts every time.)

The CSAT of that darkest timeline is probably...not great.

Read more:

- [Should I Let My Staff Complain About Customers?](#)
- [Dealing With Abusive Customers](#)
- [Making Content More Inclusive](#)
- [How to Recognize, Reduce, and Repair Customer Service Burnout](#)

1 If both parties are fully aware of how the tool works, that's a different story.
2 A truth easily confirmed by anyone seeing the earlier drafts of these very newsletters.
3 As evidenced by the many people sending in "URGENT!! How to recall email!?" questions at my last job. I had to inform them that I, in a trait I share with Cher, could not turn back time.

Are you not intertwined?

Small injustices can hold disproportionate emotional weight. The parking ticket when the sign was incredibly confusing.¹ The birds rioting outside your window on your long-awaited day to sleep in.

Or getting a poor rating for your customer service performance when it is the product itself that the customer is actually unhappy with.

It feels so unfair to cop the blame for something entirely outside your control, particularly if your job performance is measured using those same satisfaction ratings.

Customers are not (for the most part) doing it maliciously. They have been given an opportunity to share their opinion, and they are not required to make a careful distinction between the company, the product or service, and the person serving them.

And that is reasonable. What we call a “brand” is really just the combination of all of those elements. In my experience, support teams are happy to take the upside of a strong brand—they rarely complain about getting high ratings for their service when customers just love the product.

In reality you can’t disentangle the service experience from the sales and marketing and product experiences. They all influence each other. They set, reinforce, or break expectations.

We can try to measure just the service elements by carefully wording the survey question and by associating it more closely in time with a particular service experience, but that will always be approximate at best.

¹ [Like these.](#)

All metrics are ultimately just a shadow of reality. They are useful but imperfect indicators of what is actually happening in the world. The deeper solution is to create an environment of trust, where it is safe to acknowledge the reality that some poor service ratings are really about the product or the company and not the individual team member — as are some great ratings.

In a customer-centric company, it should be safe to talk honestly about the customer experience as a whole and to work together to improve it without laying blame unfairly.

Read more:

- [Customer Satisfaction Surveys: A Comprehensive Guide](#)
- [What it's really like to work at Help Scout](#)
- [6 Proven Strategies for Building a Customer-Centric Company](#)
- [Customer Satisfaction: What It Is and 6 Ways to Boost It](#)

Thanks given

If you celebrate Thanksgiving, then I hope your queues will be calm and your turkey song weirdly affecting. I'm thankful for you, friend — caring enough about your job and your customers to spend your time with me.

If you are working through the holiday, I hope your boss and your customers appreciate it. And though customer service work can be exhausting and under-appreciated, there are things we can all give thanks for:

For the customers who take great screenshots and the ones who attach the right files.

For every single person who reads the help documentation.

For the colleagues who take over when you just can't anymore, and the boss who knows when to give you a break.

Be thankful for the people who are polite even when they are in the right.

For those who admit their mistakes and especially the ones who apologize.

For the people who get your name right and the people who at least get your jokes.

The ones who know the difference between rating the product and rating the service and the ones who know the difference between a request and a demand.

Give thanks for the people who provide the relevant details and the people who provide irrelevant GIFs.

For the leaders who invest in customer experience, the managers who listen, and the engineers who care about users.

For the customers who give us work to do and people to do it for.

And for all the kind ones.

Self-help for yourself

Empathy is a key customer service skill for good reason. However, research indicates there are several different types of empathy.

If you can “get into the mind” of your customer, you can better understand their perspective. That’s cognitive empathy, and it helps you write support responses that are best framed for each specific customer’s understanding.

Emotional empathy is the “I feel what you feel” form, which certainly helps create a connection but can become emotionally exhausting for customer support staff.¹

That is the theory, anyway. In practice, your mixture of empathic response is different to mine and everyone else’s. Packed inside your work bag, along with your healthy snack and laptop charger, is a hairy, messy blob of wins and losses and trauma and joy and fear and hope and stress.²

Now we’re all also hauling an extra bag of war and pandemic and flood to work each day, just like our customers are.

So take it easy on yourself, and conserve emotional energy for helping the people who desperately need it.

Here is some reading that may help:

- [How to Recognize, Reduce, and Repair Customer Service Burnout](#)
- [6 Ways to Weave Self-Care into Your Workday](#)
- [Building Exceptional Teams and Culture in a Pandemic: Live Q&A](#)
- [Simple steps to decompress](#)
- [How to Deal with Difficult Customers](#)
- [Real ways you can help Ukraine as a foreigner](#)

¹ Sympathy is a whole other thing entirely.

² I imagine it looks like the amorphous nightmare I tip out of my kid’s school bag on week three of the summer break.

Say my name

In “Romeo and Juliet,” Juliet famously questions, “What’s in a name? That which we call a rose, by any other name would smell as sweet.”

Maybe that’s true of the flower, but if your friend wants to be called Rose, just call them Rose. Using their preferred name is a basic requirement for respect and connection with any customer.

I have a common English/Irish/Scottish name,¹ though with an uncommon single-t spelling that people get right maybe 70% of the time. But our names are more than labels. They can be entwined with cultural, racial, and gender issues that create expectations and associations before a customer service conversation even begins.

It is impossible for any of us to completely avoid implicit biases, but we can at least pay enough attention to use the correct name for the people we are trying to help. Make it part of your quality rubric, and don’t rely exclusively on your help desk tool to insert the right name. A customer using another person’s account or a support team using a shared inbox may create a “from name” that does not match the email signature.

Names hold power beyond people, too. That is why companies and government departments are serially rebranded to dissociate themselves from past problems.

What do you call the people your team helps? We talk a lot about customer service at Help Scout, but many of you probably don’t talk about “customers” at all. You might be dealing with students, alumni, staff, clients, or partners.

The name you choose to call the people you are communicating with sends a message to the people in that group about how you perceive them. It sends a message to the folks doing the work, too.

¹ I was once in an email thread with five other Gmail-using folks named “Mat(t)hew Patterson.” One Matt, sick of misdirected emails, had emailed us all to “sort this out.” An admirable but doomed attempt; I still receive emails for another Mat(t)hew who is really into parasailing.

A “good,” positive name does not ensure good service, of course. In fact, any dissonance between a label like “customer care” and the actual service received can make the whole experience even worse. A [customer service team name](#) is just an indicator of intention and must be backed up by real action and sensible policy.

By the way, we have [six surviving signatures from William Shakespeare](#). In them, he spells his own name six different ways. Perhaps that explains his insistence on scent-based identification.

Read more:

- [47 Pro Tips on How to Talk to Customers](#)
- [What to Call Your Customer Service and Support Teams](#)
- [Making Content More Inclusive](#)
- [Customer Support vs. Customer Success: Explained](#)

Catch me if you can

William Chaloner was a talented man (in the Mr. Ripley sense, at least). In the latter half of the 17th century in England, Chaloner counterfeited coins and banknotes, sold snake oil, and got paid to “solve” robberies he had committed himself.

It was said of Chaloner that he had “the best knack at Tongue-pudding,” referring to his ability to persuade through verbal agility.¹ After a long and preposterously prosperous career as a con artist, it took Isaac Newton to catch Chaloner, who was eventually hanged.

Con artists’ ability to charm, convince, and deceive can fascinate us,² but they do immense harm. Creating confidence in others is a legitimate skill; abusing that confidence to scam people is the problem.

Much of our work requires confidence building. Consider the person who won’t take the necessary steps to solve a problem because they don’t trust customer service teams. Or the student who has to be convinced of their own capabilities before they will let themselves risk really trying.

What comes out as anger from customers is often rooted in fear³ — fear of failure, of wasted money, of disappointment, or of being ignored or forgotten. Quality service includes giving people reasons to trust that wrongs will be righted, results achieved, and mistakes need not be fatal.

On the other hand, overconfidence can also cause problems, like the people who *just know* how easy it would be to “fix” an issue or how much it should cost. Unable to comprehend the truth, they need their confidence carefully clipped like a prize-winning poodle before they will be willing to listen.

1 It is also a recipe that I am personally in no rush to try.

2 See also the current murder podcast industry which has some crossover characteristics.

3 For many people, anger is a more socially acceptable emotion to display than fear. This is bad.

Before you rush to an answer, re-read the question and consider whether this person is ready to hear it or if they still need reasons to believe. Don't try to put everything in the square hole.

For more on the role of confidence for customer service professionals, listen to this bonus audio clip.

Read more:

- [How to Deal with Difficult Customers](#)
- [In the Works: Confidence with Shelly Omílàdé Bell](#)
- [Crisis Communication Tips for Customer Service Teams](#)
- [Museum of Customer Support: The World's Oldest Complaint Letter](#)

Servicing Your Career

“A ship in port is safe, but that is not what ships are for. Sail out to sea and do new things.”

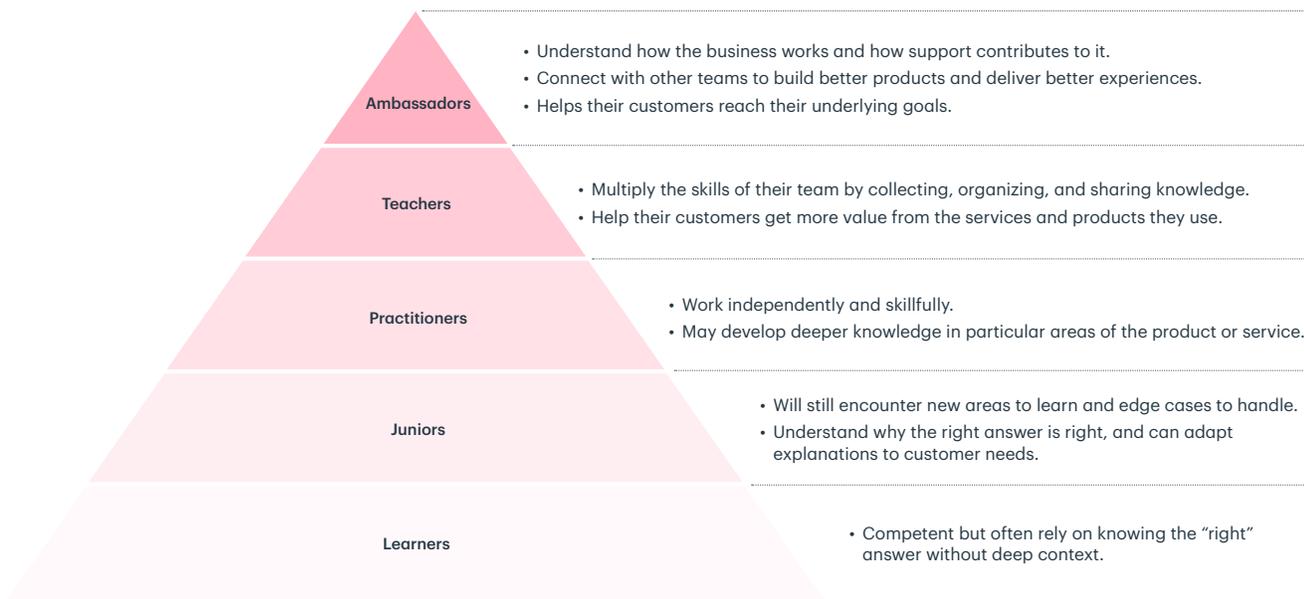
— GRACE HOPPER

An amazing opportunity....

Please don't worry. I mean, it is a pyramid, but not the kind where someone you went to college with 15 years ago has a sudden and urgent desire to "catch up" about your "financial freedom."

This pyramid is about growth for the individual customer service professional. I know many people who deliberately remain in individual contributor roles because they find the work satisfying and rewarding.

All of those people do a much better job today than they did in their first year or two of support. They may have the same title they did back then, but they aren't doing exactly the same things. Here is what I mean:



Read more:

- [Tips for Finding Your Perfect Customer Service Career Path](#)
- [21 Key Customer Service Skills \(and How to Develop Them\)](#)
- [Will AI-Powered Customer Service Replace Your Job?](#)

First impressions last

On his way into his first interview with a major bank, my friend somehow pulled a three-foot-long handle completely off the glass entry door. His first interaction with his prospective boss was awkwardly handing him a literal piece of the building, like a cat dropping half a dead bird at his feet.¹

Beginnings are often fraught: a first day at a new job, a first day at school, even the first time trying to use a new tool. You don't know where to find anything, the right way to do things, or who you are supposed to talk to.

If you want to find the biggest bang-for-your-buck areas to improve in your business, take a look at your onboarding. Onboarding is a time that presents enormous opportunities to create better experiences and more engaged people, whether they are new staff or new customers.

If those first few days are positive, it can create a lasting confidence that will see people through the tricky period of not-quite-getting-it.

What was onboarding like for your current job? Is there anything you wish had gone differently? Let me know.

Read more:

- [A Detailed Guide to Remote Employee Onboarding \[+Checklist\]](#)
- [Customer Onboarding: Steps, Examples, and Best Practices](#)
- [Customer Service Training: 21+ Tips, Activities, and Courses](#)
- [5 People You Need On Your Customer Support Team](#)

¹ He did get the job, so maybe try that next time you've got an in-person interview.

Principle or petrification?

I was never offered a typing class at school, falling into a post-typewriter/pre-omnipresent-computer gap. When I bought a mechanical keyboard a while back, I decided I should finally learn.

It was rough. My several-finger typing was quick enough that going back to absolute basics felt like slow motion. Learning something when you have no other option feels different than abandoning a mostly-working skill to go backward.

It's not that old dogs like me can't learn new tricks, but that we have self-worth and years of effort tied up with those old tricks, and it is difficult to let them go.

That same feeling applies to experts in most fields. Surgeons hated the idea of checklists, even though they were proven to vastly improve patient outcomes. In the customer service world, it can manifest as resistance to new approaches, new policies, or different leadership.

But change is inevitable. A growing company with more customers cannot do customer service in exactly the same way it did at the beginning.

It is true that not every change is good; sometimes new policies are less customer friendly or will cause real problems. It is good and right to argue thoughtfully about them.

But before you do, take a moment to consider whether your reaction is based on a real principle or whether it might be more about avoiding temporary discomfort.

Adaptability is a life skill that you can take with you into every future role and one which your colleagues will notice and value.

I am still practicing my touch typing. Wish me luck.

Read more:

- [The 27 Best Customer Service Books](#)
- [Customer Service Training: 21+ Tips, Activities, and Courses](#)
- [Tips for Finding Your Perfect Customer Service Career Path](#)
- [How to Change Your Team's Behavior](#)

Like Franky said

Some monarch butterflies spend their lives as part of a multi-generational migration between Canada and central Mexico. At one point in their southward journey, they take a seemingly pointless detour in the middle of Lake Superior before heading south again. They're avoiding a mountain that no longer exists.¹

Humans are just as likely to keep doing something long after it stops being necessary. Sometimes those are harmless traditions in the throwing rice at a wedding category, where we might have forgotten the original intention² but continue to enjoy the activity.

On the other hand, work practices that once made perfect sense might be useless or even harmful today. Have you been asked to fax something in the last decade? Maybe you have been forced back to an office even though you've been doing your work perfectly well from home for the last three years?

Of course other people's pointless practices are much easier to see than your own. One good way to spot them is to encourage your newest team members to vocalize their "Why on earth do we do it this way?" questions early on, before curiosity is crushed into conformity. Learning from people of varied backgrounds and cultures is another way diversity will strengthen your company — if you're willing to listen.

Pay attention to people outside your business, too. Listen to your community, your competitors, your mentors, even your children. Don't be like Frank Sinatra, insisting on doing it your way.

Stay curious, be flexible.

Read more:

- [9 Ways to Foster Diversity and Inclusion at Work](#)
- [AI, Curiosity, and the Future of Human Customer Service](#)
- [How to Build a Globally Remote Team That Really Works](#)
- [4 Ways Groups Can Stifle Creative Thinking](#)

1 Well...so Gizmodo says. I looked into it, and while the butterflies apparently do take a detour, I can find no evidence anyone has ever seriously proposed a missing mountain to explain it. Gizmodo may be making mountains out of monarchs.

2 Rice symbolized fertility and prosperity, and to shower it over the newly married couple was to request a blessing on them. It was also a more immediate blessing on the local birds, who could safely enjoy a free meal.

And he wasn't a little caterpillar anymore

Have you ever wanted to reinvent yourself, friend? To leave behind all the mistakes and regrets of your past and emerge as something new and better? It is tempting.

In reality, the closest most of us will get to going full Bowie or Madonna is trying out a new look on the first day of the school year, then immediately abandoning it the instant anyone says anything critical.

Most change happens bit by bit, every day incrementally different than the day before. That's as true at work as it was during our school years. Customer service work specifically has a reputation for repetition, a job where both you and the work are unchanged by the passage of time.

Perhaps that is true in some places — a call center where staff are so scripted and constrained that they can change nothing so they learn nothing. But that's not your situation.

If you see a question today that you first answered three years ago, you won't give the same response. The you-of-today understands more about how to read the question and the question asker, more about how they feel and what they really need, and more about the answer and how best to explain it.

Support questions can be repetitious, but so can any form of practice. And practice is exactly what the best customer service professionals do. They practice their skills, try new approaches, and stretch outside their comfort zones to learn new things.

Luckily for us, support is a fast-feedback environment. You will quickly learn if you are delivering more value to your customers. A good leader will notice that about you, too, but even if not, you'll know.

By actively working to improve your skills, you will make your job more interesting, do better by your customers, and make yourself more employable in a time when you may need it.

Tell me one thing you are better at today than when you first started in your role. I'd love to celebrate your progress with you.

Read more:

- [The Art of Troubleshooting for Customer Support Professionals](#)
- [Range: Why Generalists Triumph in a Specialized World](#)
- [Customer Service Training: 21+ Tips, Activities, and Courses](#)
- [The Making of an Expert](#)

Honing Your Skills

“Smooth seas do not make skillful sailors.”

— AFRICAN PROVERB

My bad habits lead to useless air conditioning

This summer I finally got air conditioning in my home office. It is delightful, but several times I forgot to turn it off at the end of the day. After trying and failing to “remember harder,” I attached the remote control to the inside of my office door, right by the handle.

Now I have to almost touch it to leave the room. My behavior has changed and I have formed a new habit. On [The Supportive blog](#), I suggest [making the right things easy](#) as a useful approach for support managers looking to embed more effective behaviors in their teams.

Customers have habits, too. In fact, our word “customers” derives from the Latin *consuetudo*, meaning a habit or customary behavior.

The habit we most hope to inspire in our customers is the repeat business we call [loyalty](#), but habits also apply to how customers ask for help, how they treat our staff, and how they use our products.

Thinking about the triggers and feedback loops that we create for our customers can yield some fruitful areas for improvement. Which habits are [your contact pages](#) reinforcing, for example?

Meanwhile, I am going to work on my next bad habit, which I will leave to your imagination and best guesses.

Read more:

- [How to Change Your Team’s Behavior](#)
- [How to Break Your Worst Work Habits](#)
- [How to Inspire, Measure, and Improve Customer Loyalty](#)
- [Routine Disruption: How to Change Your Habits for the Better](#)

Where everybody knows your name

Do you have anywhere that you can order “the usual,” dear reader? At my local cafe, my coffee¹ is often ready by the time I reach the front of the line. They know me well and I love it.

I am less excited when the convenience store owner makes a knowing comment about my favorite unhealthy snack choice. I know it, they know it, but I would really prefer that we all pretended not to.

Just because you (think you) know something about your customer does not mean you should use that information. Online, data collection and reuse happens at a vastly larger scale. I have personally put some effort into de-personalizing my online inputs but it is a real Hans Brinker situation.

Can personalization be done well online? Certainly, but not without thoughtful effort. Help Scout lets you pull your customer data into the sidebar, but it is the role of the customer service agent to use that information well in order to facilitate a more helpful conversation.

What values, boundaries, and examples does your team have to help them make use of contextual customer data? How might things go wrong, and how could those be avoided?

Read more:

- [Customer Support; Definition, Importance, and 8 Essential Tips](#)
- [Area Man Hires Models to Promote The Shopping Cart He Invented](#)
- [What Is Contextual Support, and Why Is It Critical to Live Chat?](#)

¹ Oat flat white.

Back on the tools

Where do you fit on the spectrum of tool users? On one end are the people who, convinced that Phillips head screws are an industry scam to sell screwdrivers, use a flat head on every screw and a hammer on everything else.

On the other end are the people who spend a fortune on “professional” tools because they watched a YouTube video about hanging curtains.

In the middle are the actual professionals. These are the people who spend big on a few tools which are critical to their work but are otherwise happy to use whatever works.¹

Software tools are no different. Plenty of high-quality customer service is sent out from a shared Gmail inbox, and plenty of companies are paying big bucks for way more complex tools than they will ever use.

The trick is to find the tools that will help you get the required jobs done with the least effort. Of course, tradespeople typically buy their own tools, building up a set of trustworthy pieces that they use for years or decades.

In the software world we are often stuck using tools chosen by someone who will never use them (but who does control the budget). That mismatch of priorities can add daily friction to support teams, and it can ultimately impact customer service quality.

It’s a poor workman who blames his tools, true. The quality of the work output is what matters. But if I nipped across the road and replaced the tools on my neighbor’s half-built house with my kid’s First Construction Play Set, I reckon the timeline on that project might blow out a bit.

Tools do matter, so it is worth your time to understand what you need and to develop some internal influence over tool selection.

And get yourself a good set of screwdrivers.

Read more:

- [7 Shared Mailbox Best Practices You Can Put Into Action](#)
- [The 19 Best Customer Service Tools for Every Support Team](#)
- [Setting Up a Help Desk: A Step-By-Step Guide and Checklist](#)
- [The Right Way to Consolidate Your Customer Support Tools](#)

¹ Also the people who buy the 460-tools-in-one things off the TV but never open the box because they don’t have anything capable of piercing the packaging.

“Curiouser and curiouser!” cried Alice

There are many ways to skin a cat, Cheshire or otherwise. And you can measure room capacity by the ability to swing a cat in it. Just don't let that cat out of the bag,¹ or it might get your tongue.²

Ultimately, it was curiosity that killed the cat.³ This is unfortunate, because curiosity is vital, particularly in customer service.

Well...unless you want your support team to exclusively follow a script and provide pre-written answers. In that situation, curiosity is a disruptive influence. You don't need people asking questions or thinking outside the inbox.

But if you do want your team to engage with your customers as humans, to read between the lines, and to uncover information you did not know and could never access, then you want them to be curious.

The job of the customer service leader, then, is to hire curious people and to create an environment in which curiosity is cultivated, not crushed.

Here is what I'm curious about today: What is the one job you wish your customer service tool could just do for you? Let me know.

Read more:

- [AI, Curiosity, and the Future of Human Customer Service](#)
- [21 Key Customer Service Skills \(and How to Develop Them\)](#)
- [Tips for Finding Your Perfect Customer Service Career Path](#)
- [Balancing Soft-Skills With Technical Ability](#)

¹ What is it doing in there anyway? Reading secrets from your diary using a little head torch, presumably.

² And why does a cat need another tongue? Is this some sort of feline tooth fairy equivalent?

³ Unclear whether it was just once or all nine times.

Blinded by the light

The James Webb Space Telescope is now fully operational. With a collecting area six times that of Hubble and its near-infrared instrumentation, it is both literally and figuratively extremely cool).

This telescope lets us see things that were previously impossible to see because they were too far away or blocked from our view by other objects.

Managers back on Earth could use a similar tool¹ to study the performance of their customer-facing teams. It is easy to measure some types of performance: The queue crusher will turn up on the top of your reports each month.²

Other types of performance are harder to see. This might be from the folks who appear mid-field in your resolved conversations report but who are quietly answering Slack questions from six different team members via DM.

It might be from someone who spends time tracking down an intermittent issue that has generated 40 conversations without a satisfactory answer.

Or it could be from someone who put together data for the product team to convince them that one little change could prevent tons of customer problems.

There are so many ways to contribute to the success of a customer service team that are not immediately obvious or instantly measurable. One way to identify and encourage those behaviors is by making them a part of your role description.

I have adapted a document I used for my previous team in which I provide a broader definition of success. You are welcome to read it, copy it, and adjust it to suit your particular situation.

If you do, I would love to hear about it!

Read more:

- [Free template: How to succeed in support](#)
- [19 Actionable Help Desk Metrics for Customer Support Teams](#)
- [Working Successfully in a Collaborative Support Model](#)
- [Measuring Customer Service Success More Broadly](#)

1 Though perhaps not at the cost of \$9.7 billion. It's hard enough to prove customer service ROI already without triggering a full-on budgetary supernova.

2 Their bright light leads managers into thinking, "If only we had 10 of them, we could cut the team budget in half!" But invisible work is still work that has to be done.

The taming of the queue: 14 support queue management tips

A garage sale sends a message. It might say, “My children are never coming back for that Goosebumps collection I spent so much on in the ‘90s.” Or “I really thought I would enjoy pottery, but I think I just liked Patrick Swayze.” Or “It turns out my abs aren’t the blastable kind.”

But at least with a garage sale you can choose what to show. It’s worse when surprise visitors arrive and the house looks like the Cat in the Hat has been crashing on your couch for a month.

How would you feel if another customer service leader turned up unexpectedly to hang out in your support queue? Which tickets might you quietly kick into a discreet folder? What excuses would you feel compelled to make?¹

Maybe your queue is so neat it merits a double-page spread in Minimalist Support Monthly. But maybe not. We all get used to seeing our own mess, like the conversations that are growing mold at the bottom of page two or the ticket that has been reopened so many times it doesn’t close properly anymore.

Have you got time this week to have a little cleanup? It might be [reorganizing your queue management system](#) or setting up some [automations](#) to keep things neat?

Read more:

- [Inside Help Scout: How We Triage Our Support Queue](#)
- [How to Succeed as a Customer Support Manager](#)
- [5 Ways to Automate Support Without Degrading Service](#)

¹ “So sorry, my triage team is off for training today. I promise it’s not usually so messy.”

33 sizzle-free steaks from the Help Scout grill

Sometimes I see a long article, and I just speed-scroll through, scanning for the headings and the lists. Maybe you do, too.

Collect customer feedback

1. Customer feedback surveys
2. Email and contact forms
3. Usability tests
4. Exploratory customer interviews
5. Social media
6. On-site analytics
7. Instant website feedback

Measure customer experience

1. Net Promoter Score
2. Customer Satisfaction
3. Sales/Revenue
4. Customer Effort Score
5. First Contact Resolution
6. Early Cancel Rate
7. Sentiment analysis

Switch help desks

1. Get your team on board
2. Review where customers ask for help
3. Plan your data migration
4. Educate your team
5. Educate your customers
6. Pick a quiet day to migrate
7. Make a plan for active conversations
8. Update the whole company
9. Test everything you can

Apologize effectively

1. Be truly sorry
2. Validate your customer's feelings
3. Explain what happened
4. Admit to your mistakes
5. Explain what you'll do differently

Automate support

1. Send satisfaction surveys
2. Confirm support requests have arrived
3. Refer people to your knowledge base
4. Organize your support queue
5. Use saved replies

What does this mean?

That was the question that came from the German fellow who sat comfortably to my left in the “window seat with extra leg room.”¹ I was in the middle seat for our 14-hour flight, quietly seething with a potent combination of jealousy and potential DVT.

He was pointing at the “What is your usual occupation?” question on Australia’s Incoming Passenger Card. “They mean ‘What’s your job?’” I told him. He nodded his understanding, so I returned to my episode of *The Cleaner*.²

Travel is stressful at the best of times, which these very much are not. Saving a few minutes of confusion across millions of people’s trips through simpler writing, better wayfinding, and helpful staff multiplies out to many years of customer effort avoided.

Online customer interactions are ripe for these sorts of small improvements. Tweak the language of your contact page so you receive clearer questions, leading to better first responses and faster resolutions.

Improve your in-app copy so customers never need to ask for help. Whenever people do need to reach out, be sure to respond with clear, concise, plain language.

Read more:

- [What makes writing more readable?](#)
- [8 Best Practices for Designing a Helpful Contact Page](#)
- [Reduce Your Support Load Through Better Product Writing](#)
- [How to Hire for Chat and Email Writing Skills](#)

¹ [Seat 68A on the Emirates A380](#), aka The Miracle In The Economy Cabin.

² [The Greg Davies series](#). Worth a watch for Helena Bonham Carter alone (if you’re not hemophobic).

Speedrunning support

It takes 8 minutes and 43 seconds to “complete” Minecraft by defeating the dragon (at the time of writing at least). It took me longer just to figure out if I should be worried about my kid’s talk of The Enderman.¹

Meanwhile, millions of people spend countless hours creating and enjoying Minecraft worlds. The fastest path to the end really isn’t the point.

Customer service is the anti-Minecraft. Customers mostly want to spend as little time as possible “playing the game.” But speed is not everything. Quality matters, too. It’s not just the correctness of the answers that count, but the overall service experience.

We absolutely should understand how time is spent inside our customer service queues. Which small improvements could shave off the seconds or minutes per conversation that then multiply across every customer and team member?

What we should not do is forget that a conversation with a customer is a chance not just to answer but to listen. It’s an opportunity to learn something important about who they are, how they think, and what matters to them.

A deeper conversation is often worth more (to all participants) than merely a fast one. Picking the right time to open up a conversation and dig in deeper is a valuable — and very human — customer service skill.

P.S. I found this 1973 letter from E.B. White to be a small encouragement for a dark moment. Perhaps you will, too.

Read more:

- [Email Response Times: Benchmarks and Tips for Support](#)
- [Time To Resolution: What It Is, Why It Matters, and How to Reduce It](#)
- [Support Teams: Stop Being Distracted by Faster Response Times](#)
- [13 Productivity Hacks to Maximize Your Time](#)

¹ I was thinking of Slenderman. No relation.

Have you never been mellow?

Have you ever seen your friend say something incredibly mean to their sibling? The type of thing you expect to start a fight, but instead they both fall about laughing? It is a strange truth that the closer you are to someone, the ruder you can be. That shared history of good times, hard times, and inside jokes means you can predict their reaction with a high degree of accuracy.

People on the outside of that relationship, without that deep context, may divine a very different meaning. When the relationship is between customer and company, there can be years of service, lost and rebuilt trust, shared language, and even inside jokes, all person-to-person.

Delivering customer service on social media channels is like having a family argument live on stage with not-really-a-Dr. Phil. There may be a theoretical objective truth to get to, but everybody is also aware of the studio audience, and each side is trying to come off looking good.

Projecting the right tone, acknowledging real distress, operating with limited information, and doing it all under high expectations of speedy response — the skills to reliably succeed in public social media service are additive to the usual set of customer service skills.

If you find someone who can play that role for you, let them know that they are loved. The stakes may become very high without any warning, and then you'll be glad you have them on your team.

Before that day comes, put your company in the best position to deliver consistently good social service through thoughtful planning and strategy.

Read more:

- [Managing Social Media Customer Service: Strategies and Tips](#)
- [A Love Letter to Social Media Customer Service Pros](#)
- [Migrating a Customer Query Between Support Channels](#)
- [How to Determine Your Company's Multichannel Customer Support Strategy](#)

Abbott, Costello, & Skinner

A big chunk of my baseball knowledge comes from the 80-year-old “[Who’s on first](#)” sketch. The joke, obviously, is that both the characters are genuinely trying, but failing, to communicate with each other. Meanwhile we, as the audience, understand both sides of the conversation.

In reality it would take only a moment for a Principal Skinner-type to clear up the confusion, but that requires the intervention of someone who can see the whole picture. That’s hard to do from the inside.

Customer service conversations also fall into the same morass of misunderstanding, though with less hilarious results. It’s often two people ostensibly trying to solve the same problem, failing to communicate, and growing more and more frustrated.

Perhaps you have felt the embarrassment of revisiting a conversation and understanding your failure to spot the warning signs of derailment.

Sometimes we all need conversational circuit breakers: someone to step in, break the conversation out of a loop, and get things moving forward again.

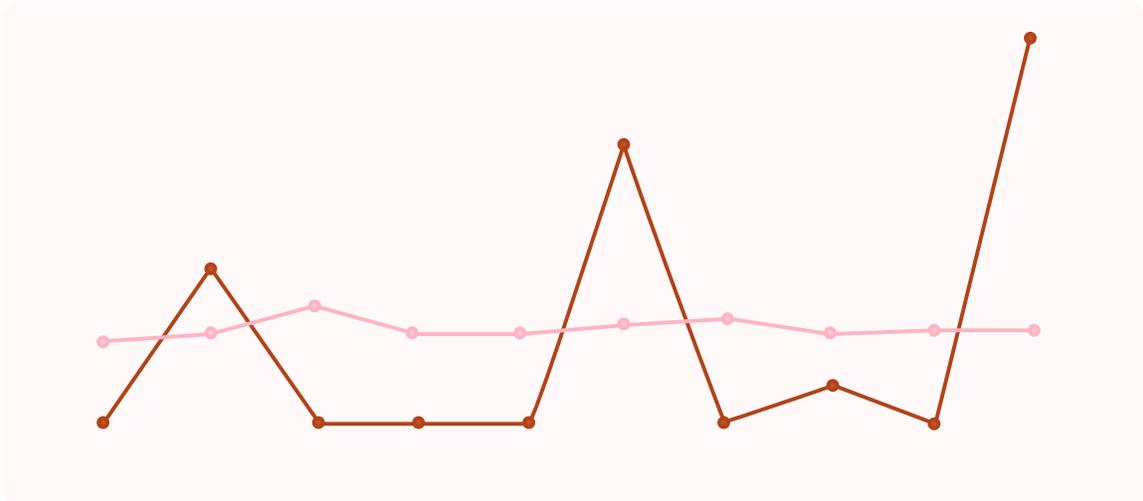
Asking a colleague to take over is not giving up; it is an act of service to your customer. Admitting when you are stuck and asking for help should be expected, admired, and encouraged.

I wrote a little more about how to deliberately use this approach in [Support Tactic: Fresh Eyes, Fresh Voice](#).

Read more:

- [Should I Let My Staff Complain About Customers?](#)
- [12 Response Templates for Tricky Customer Service Emails](#)
- [How to Deal with Difficult Customers](#)

Same average, different customer experience



Help desk reports are an excellent place to hide customer service crimes, even from yourself. If you need to impress the boss around review time, you can probably find a graph to do the job. Of course, I know you would never do such a thing intentionally, dear reader.

It is even easier to do unknowingly. The two lines in the graph above have almost exactly the same average in the source data, which measures minutes to first response. The customers represented in pink all received responses within a few minutes of each other. The average is useful here.

The customers represented in red, on the other hand, have much less in common. That same average is now actively misleading, and any decision you make based on it may be wildly off track for a significant number of customers.

Spiky data requires more thoughtful analysis and handling. Some industries are spiky by nature; the Great Pumpkin will be raining down pumpkin spice on some of you right now.

Ecommerce and retail employees of all types know the stress of holiday seasons and the challenges of retaining high-quality service under the potent combination of high volumes and new (often temporary) team members to train.

Higher education is another highly seasonal industry, with defined semesters creating ramps up and down in communication volume.

That pattern was predictable historically, but today the repeating rhythm is being disrupted by entirely too much cowbell in the form of a global pandemic. It is driving growth not just in online learning, but in online communication of all forms between faculty, staff, students, and alumni. If you are involved in higher education or know someone who is, our complete guide to email management in higher education ebook offers practical advice for thriving through this change. We would love for you to take a look.

Whatever industry you are in, don't forget the unique, real people behind every metric. These are people with their own stories and experiences. We will always have to make decisions that balance various audience needs, but no person is truly average.

Read more:

- [Holiday Customer Service: 6 Tips for Scaling Support Spikes](#)
- [The Complete Guide to Email Management in Higher Education: Ebook](#)
- [7 Key Customer Experience Metrics, From Basic to Advanced](#)
- [Measuring Customer Service Success More Broadly](#)

Signals and shibboleths

Jargon would be a good Marvel villain name — the more complex type of villain, one who may get a satisfying redemption arc in their own series.

Jargon, that set of words or phrases used to create meaning for specific groups of people, is not always bad. There is nothing wrong with using well-defined language to concisely communicate ideas to your colleagues or group members.

The problems arise when talking with people outside of that group or even to people new to the field. Then jargon flips from time-saving shortcut to frustrating cipher that can be deliberately exclusive.

Support teams act as a translation layer between the customers and the internal staff of the business. In technical support, the language difference can be very obvious — your engineers might tell you that a sharded cluster failed, but that is no help to most customers — but outside of technical fields, the difference is more subtle but all the more dangerous for it.

The biggest confusion comes when both sides know what the individual words mean but each side understands them quite differently.

So our first job as customer communicators is to be aware of the jargon we use internally. It is easy for such language to become functionally invisible when we are immersed in it daily. How many people even know what a “web browser” is, let alone which version of which browser they are on?

Then we must decide how and when to rephrase that jargon so that the intended meaning is passed on. For some customers, jargon can be a passkey to a better customer experience. For others, the same jargon shuts them out completely.

One place where in-group jargon is a real timesaver is within your own community of colleagues. You'll experience this if you attend [Support Driven Expo](#) with me in Las Vegas this October. Help Scout is a sponsor and we're also on stage:

- ["Queue Discovery: Use support conversations to have better product discussions."](#) [Help Scout's director of product support, Elyse Mankin, will help you get through to product leaders.](#)
- ["The Greatest Mistakes In Customer Service History"](#) is my chance to tell you some [entertainingly bad stories of service.](#)
- ["How To Give a Support Conference Talk"](#) is my workshop to help you get on stage [yourself.](#)

Read more:

- [12 Customer Service Phrases to Use \[+ 8 You Should Avoid\]](#)
- [8 Tips for How to Approach Cross-Cultural Customer Support](#)
- [How Ritz-Carlton's Support Lexicon Created Unity through Clarity](#)
- [How to Write with Substance](#)

Shaping Customer Experiences

“It’s the little details that are vital. Little things make big things happen”

— JOHN WOODEN

Love is only a feeling

Companies can't love you, even on Valentine's Day. The company you work for is not your family either, by the way. Businesses are not beings¹ and it can be dangerous to act as if they are.

Help Scout is a B Corp, which aims for particular positive impacts, but the legal structure doesn't create those impacts. It's the work of individual people inside the company over time that will generate results (or not).

Your company can't feel anything, but like any, it can certainly trigger feelings in your customers. What will they feel? Appreciation, frustration, excitement, disappointment. Satisfaction. Hate, possibly, and even love. Maybe.

Those feelings are determined by all the different ways your company intersects with their lives — through advertising, product design, sales conversations, and receipt copy. Also, of course, through customer service interactions.

That's "customer experience," and, ultimately, it defines your brand more than any logo treatment or consultant's pitch deck could.

We don't need companies to love us; we need them to behave predictably and fairly, deliver on their promises, and not make things worse. That is all shaped by the culture, values, policies, and practices that make up a work environment.

What emotions is your business best set up to generate?

Read more:

- [Taking Customer Service Beyond Satisfaction](#)
- [What Is Customer Happiness + 11 Ways to Inspire It](#)
- [Why Better Sleep Equals Better Work](#)
- [How to Recognize, Reduce, and Repair Customer Service Burnout](#)

¹ Despite [this Mitt bit](#).

A little less customer deflection, a little more direction please

Self-service should serve our customers, but far too often we serve our own needs by pushing work onto the customers and neglecting their experiences.

We talk about improving “deflection,” as if customers are pinballs about to ruin our game by falling into the drain of our support inbox which we hope can be bounced away if they hit the right deflector.

The best self-service happens when the experience is great for both parties. When I open my bank’s app and freeze my card, I am instantly happy the job is done, and the bank is happy to avoid a phone call. Everybody wins.

Think of it as directing a customer to the best place to get their questions answered quickly, rather than deflecting them from their preferred channel to a cheaper option.

A while back I heard that Piggly Wiggly was the first self-service grocery store, and I wondered how that new idea played out with customers. In this short [Museum of Customer Support video](#), you can learn what I found out.

Read More:

- [Museum of Customer Support: The World’s Oldest Complaint Letter](#)
- [Customer Self-Service: Benefits, Tips, and 5 Great Tools](#)
- [The Ultimate Guide to Using a Knowledge Base for Self-Service Support](#)

Is an iPad a laptop?

Both of my Zurich airport visits included special time in an enclosed cubicle for “extra checks.”¹ But even when things go more smoothly, airport security is like a board game where the rules change every turn but nobody tells you about it, and someone might scream at you for not noticing.

The staff members treat you like a fool for taking your shoes off — even though when you entered the country a week ago you juggled your shoes, laptop, and toiletries while hunch-shuffling along to keep your now-beltless pants up.

There is a real “Oceania has always been at war with Eastasia” energy to it all. From the staff’s² point of view, no doubt, it is obvious. They have seen thousands of people go through the current process, and they have lost all perspective of how confusing and stressful it can be.

I trust that the service experiences you deliver your customers are better, but we are not immune from the same loss of perspective. We know how our products and systems work, what they are called, how they are priced, and what they can and can’t do.

We lose that “beginner’s eye” so quickly, and we can fail to communicate clearly to customers who lack our own experience and context. Fortunately, we have some tools to help us maintain empathy and perspective:

- Pay your support staff well, and treat them with respect. It will flow on to your customers.
- Listen to your newest team members. Ask them what they find odd or confusing.
- Define a quality assurance (QA) process that checks for appropriate tone and language.
- Practice analytical reading.
- Work to prevent and address burnout.
- Create a culture of kindness and service.

1 I don’t know why. Perhaps I had retweeted a rumor that Roger Federer hates Toblerones.

2 Not just the security staff, either. Even an airline CEO might blame customers for delays, in a truly impressive own-goal of publicity.

Our airport security experience is unlikely to improve much in the near future, but that particular bar is so low it could be in a Coober Pedy hotel. We can do better.

Read more:

- [How to Recognize, Reduce, and Repair Customer Service Burnout](#)
- [How to Deal with Difficult Customers](#)
- [10 Ways to Improve Your Customer Service Security](#)
- [Why Customers Ask Vague Questions \(and What To Do About It\)](#)

You sell us water and keep the good wine for yourself

When you have a complaint about your date's uncouth behavior or the wine being served at your dinner, you have options: a quick tweet while they are in the bathroom perhaps, or an angry Trip Advisor rating in the car park afterward.

The first-century residents of Pompeii, lacking access to a reliable mobile network, instead scrawled their complaints¹ directly onto the nearest wall. This must have been somewhat obvious to their targets, but it does mean we are still able to read them now, almost 2,000 years after they were buried under the catastrophic eruption of Mt. Vesuvius.

Pompeiiian graffiti has given us even more than one-star restaurant reviews. The thousands of examples found have become a primary source for understanding what and how people ate, the way they lived their lives, and how they really spoke to each other (as opposed to the classical Latin of official documents and literature).

Our own customer service inboxes can perform the same role. The conversations that happen in support reveal the true ways in which our customers talk about our companies. We can see the phrases they use to explain their problems, how they think about our competition and market, and how they actually use our products and services, as opposed to how they were intended to be used.

Understanding those differences is hugely valuable for people across the business, from product designers to marketers and salespeople to documentation writers. All of them need that knowledge, but they may rarely be exposed to undiluted customer interactions.

So customer service teams must be archeologists.² Identifying, translating, and categorizing customer insights and presenting them to the right people will make better CX possible and customer service roles more impactful.

Read more:

- [Museum of Customer Support: Ancient Fast Food](#)
- [10 Techniques for Collecting Voice of the Customer Data](#)
- [Fast Food vs. Fine Dining in Customer Service](#)
- [Visit Sea Sat, the Customer Service Restaurant](#)

¹ The subject line and heading of this email are both real examples of graffiti complaints found in Pompeii. Check out [the Ancient Graffiti Project](#) for more.

² Whip and fedora optional (but encouraged).

A sixth census

As long as there have been nation states, those nations have conducted censuses,¹ starting at least as far back as ancient Babylon² in 3800 BC. Counting their people (and also their grain, beer, and butter) enabled rulers to levy taxes and better organize resources. Probably mostly the tax thing.

Better information should mean better decisions, but that is not always the case. As a customer, it is infuriating to be repeatedly asked for information you have already provided. It feels like the company is suffering a corporate amnesia that mysteriously affects every person except those in the billing department.

When the person serving you has all the relevant information at hand and (crucially) the time and training to use it, they can deliver much more effective help. In the real world that might be your local grocer, pharmacist, or barista. They can anticipate your needs, and they know how best to communicate with you specifically.

Online, we rely on technology to provide that contextual knowledge at scale. Help Scout's sidebar can show all sorts of useful details, particularly if you connect it to [your other business data sources](#).

How might you respond differently if you knew a customer had never used a particular feature in your app or had broken a years-long pattern of ordering a certain product? Or that they had just hired a bunch of new staff who might have not yet been trained on your system?

That type of information is probably already inside your organization somewhere; are you really using it?

Read more:

- [How To Make the Most of Your Customer Support Data](#)
- [Help Scout & Census: Sync trusted data to delight customers and reduce churn](#)
- [Humanize Your Support With Data](#)
- [Turn Support Hunches into Usable Data for Product Teams](#)

¹ In fact, the word "statistic" originally meant "information about the state."

² Also the site of [the first #CustomerServiceFail](#)

Insert provocative title here

Mail merge mayhem was inevitable once the technology existed. [The “Dear Rich...” fiasco](#) is my personal favorite. Choosing good defaults matters. Our personal habits, good and bad, are essentially default behaviors, triggered by anything from opening the fridge to picking up a phone to hearing the theme song to [“The Bill.”](#)

When it comes to producing work, thinking carefully about default outcomes is critical to consistent quality. You may have absorbed the idea that excellent service comes through heroic individual effort to go above and beyond on behalf of the customer.¹

Implied in that idea is the expectation that customer service will typically be poor, but the flashy efforts of a single person can save the day. Superheroes are not real, though (even if you live in [Gotham](#)). In any case, if they were real, the destruction they leave in their wake would make for very poor [customer service ROI](#).

Rather than spending our energy swooping in to rescue customers dangling over a precipice of our own making, let’s avoid those situations entirely. Let’s build systems where doing the job competently will generate high-quality customer service experiences without exceptional effort.

Instead of laser eyes, use sensible pricing policies. Replace magic hammers with delegated authority for your support team to act. And push Nick Fury out² in favor of leadership that is genuinely customer-centric.

Read more:

- [If Customer Service Were Really Superheroes](#)
- [12 Response Templates for Tricky Customer Service Emails](#)
- [Guiding clients to email support instead of their account managers](#)
- [How to Break Your Worst Work Habits](#)

¹ Or if that all seems too hard, then at least bring in some [customer service-specific heroes](#). We too [bear guilt](#) in this area, though we do also publish [boring stories](#).

² Nick would be welcome to interview for the role. He certainly makes [a strong case for his moral leadership](#).

Well, what did you expect?

If your partner is expecting a romantic comedy, even the best psychological horror film is going to go down poorly on date night.

Your expectations literally change what you see, smell, taste, and feel — even to the point of confusing red and white wine.

That's why the sales team and the experience they give incoming customers is so critical to customer experience. When a salesperson sets accurate, achievable expectations for a customer, they set them up for a positive experience with the company and its products.

Alternatively, when sales promises a customer something that the product or company fails to deliver (no matter who was at fault), that inconsistency makes the interaction much worse, no matter how good it might objectively be.

Aligning your sales and marketing messages with your customer service and success approach gives everyone the best shot at getting what they need from a business relationship.

That doesn't mean all the work has to be done by sales staff; communicating clearly and staying informed is everybody's job.

Read more:

- [Reinventing Customer Service: Your Secret Sauce To More Sales](#)
- [Aligning Sales and Support for Long-Term Growth](#)
- [The 5 Key Principles of Customer-Centric Selling](#)
- [Support, Sales, and Marketing Need to Work in Harmony](#)

This is what peak performance looks like

Artists, philosophers, theologians, and scientists make strong cases for the ideal human form. But you can keep your David and your Venus de Milo. For me, it is all about that bass Gummy, a little green slab of clay who can reshape himself into the most helpful form for any given situation.

We sometimes talk about the “ideal” customer experience, as if there is one perfect form and we could replicate what Disney or Sephora do and see the same success.

Ignoring their different business models, the experience they offer is not universally desirable. The environment that someone is in, their mental state on the day, how their boss was feeling that morning — they all change what a customer needs and how they want those needs filled.

Add in an economic recession, and now your customers might be significantly more price sensitive. Your product’s ability to replace multiple systems might suddenly be vital. Perhaps you will have a sudden influx of first-time customers who are very different from your usual crowd and for whom your onboarding and customer education processes are completely off target.

Customer experience always matters, but during a pandemic or an economic crisis, it can be critical. It’s not only the overall quality of the experience, but your ability to adapt that experience to different times and different customers that makes all the difference.

So: Be More Gummy.¹

Read more:

- [Webinar: Why Customer Experience Is Even More Essential During a Recession](#)
- [How a Great Customer Experience Can Grow Your Bottom Line](#)
- [How to Identify and Optimize Customer Experience Touchpoints](#)
- [Customer Service vs. Customer Experience: Explained](#)

¹ Or, depending on your age and preferences, more [Elastigirl](#). Or more [T-1000](#).

Seeing the Forest

“In all affairs it’s a healthy thing now
and then to hang a question mark on
the things you have long taken for
granted.”

— BERTRAND RUSSELL

You are not your customer

When I was a web designer, most of my clients knew they could not build a website on their own. Almost all of them thought they could design *something*, though. They overvalued the technical skills and undervalued the seemingly more accessible design skills.¹

Similarly, service roles are often treated as a “foot in the door.” It is true you may not need highly specialized skills in many customer-facing jobs, which makes them accessible to people from all sorts of backgrounds.

But not everyone has the skill or attitude to consistently deliver high-quality service. Those skills are heavily undervalued, because it looks so easy when it is done well. However, most companies have at least some staff who should not be left alone to talk to customers.²

However, no matter what their full time job is, every person would benefit from hearing directly from the customers and clients that ultimately support their business. As companies grow and roles specialize, it is easy to become isolated from the voices of the people using your products and services.

When that happens, decisions get made that diverge from what the customers truly need. Internal language starts to leak out into customer-facing content. People forget that most customers don't have years of background context to understand how things work or why they are designed in a particular way.

If team members all across the company are not regularly exposed to the ways customers think, speak, and interact with them, they work inside a bubble that will only be punctured when the competition steals their customer base.

1 [Make the logo bigger.](#)

2 I won't name names. But you know who you are.

You don't have to have non-customer-facing people directly responding to customer queries, although you certainly can. There are lots of ways to keep customers closer. If you use Help Scout, we have just made that even easier with the release of [light users](#), a new and cost-effective way to get more people from your organization into your account.

Read more:

- [Work For Customers, Not Personas](#)
- [Turning support requests into customer insights](#)
- [Inside Help Scout: How We Implement Whole Company Support](#)
- [6 Proven Strategies for Building a Customer-Centric Company](#)

Think inside the box

Henry Ford didn't actually say, "If I had asked people what they wanted, they would have said faster horses," but it's true. People may well have asked for faster horses. What they probably wanted was to get to their destination more quickly and conveniently, ideally without the risk of being thrown from a height into a pile of...recently digested grass.

Truly new ideas rarely arrive in an Archimedean bath-leaping flash of inspiration.¹ They are more likely to arise from long immersion in the chunky soup of research, customer interviews, experiments, and knowledge borrowed from other fields.

So no, you don't have to just ask people what they want. You can read between the lines and ask good follow-up questions. Learn about people's lives and their jobs to be done, and interpret their comments in that context.

There is no guaranteed formula for inventing new products or even for making changes everyone will like, but your customer service inbox is an incredible source for the input you need to greatly increase your chance of success.

The trick is to recognize that input in its raw form and to have a process for getting it into the right hands. If your support team is merely a buffer against problems, those insights will never make it through.

The truth is out there.

Read more:

- [Turning support requests into customer insights](#)
- [Why Analytical Reading Is a Must-Have Skill](#)
- [Why Steve Jobs Didn't Listen to His Customers](#)
- [How to Create a Customer Feedback Loop That Works](#)

¹ Despite [what TV writers seem to think](#).

Teacher's pest

Learning to drive was overwhelming at first. Between the clutch and the wheel and the pedals and the signals and the mirrors, everything was happening all at once, and it seemed impossible that I could ever make sense of it.

I did, though — eventually. Even though all of those same elements are still needed today,¹ most of the time I don't have to consciously think about them. I have developed expertise, and since I am not a driving instructor, I'm unlikely to face that learning process again.

I'd guess you aren't a driving instructor either, dear reader, but you probably do have to do some instruction at work. You likely have to explain your products to your customers or your billing system to your clients or the application process to potential students. At one time *you* didn't know how those things worked either, but that may have been a long time ago

Being able to see it again from the perspective of those you're trying to help is a critical skill in our work. Not every topic expert is also an effective teacher,² either. It's no coincidence that we have several former teachers on the Help Scout team.

Whether you are working with customers and clients or training up your own colleagues, try to see with the eyes of the beginner. They don't know your internal jargon or the way your products differ from competing ones. What is obvious and simple to you might be completely opaque to them.

When your patience is tested and it feels like people are being deliberately obtuse, remember your first driving lesson or first swimming lesson. Recall the confusion or fear, including your inability to grasp the concepts in detail while drowning.

¹ Except the clutch. It's been ages since I drove a manual. I don't miss it.

² I bet a certain teacher or professor just came to mind for you.

Ask good questions. Be curious. Look for the “why” behind the “what.” Let go of your judgments.

Take a breath.

Take a moment.

And teach.

Read more:

- [How to Write Support Emails Your Customers Will Love](#)
- [What My Mechanic Taught Me About Customer Service](#)
- [11 Tips on Delivering Great Customer Service in Education](#)
- [Teaching Analytical Reading](#)

“I want to talk to a real person right now”

Have you had someone say that to you? I have, more than once. Sometimes those people just mean, “I do not consider customer service staff to be of sufficient importance to handle my ludicrous misunderstanding of a completely normal situation, so I insist someone else tell me exactly the same thing but with a more impressive title in their email signature.”

But other times, they genuinely seem to think they are talking to a bot — which was quite insulting when typical chat bots were about as helpful as a third-rate text adventure parser.¹

However, now that AI chat bots can do an apparently convincing imitation of sentience, it takes the sting out of the demand, and it also opens up the potential to respond with, “Well, you prove your sentience first, please!”²

I imagine that within the next decade, we will hear about a person discovering their CEO is just a chatbot with a well-coiffed Zoom avatar.

It is true that many customer service interactions could be handled well by AI...even if most of those could be handled just as well by a decent on-site search option. However, we are still a long way from the sort of general artificial intelligence that could understand when the question the customer asks is not what the customer actually needs to know.

1 “You see a chest in the corner.”

> *open chest*

“You can’t reach the chest from here.”

> *go to chest*

“You are already at the chest.”

> *look in chest*

“It looks like a chest.”

rage quit

2 Support career pro-tip: If your customer service metrics focus only on first response and resolution time, simply set up two AI bots, one to ask basic questions and the other to answer them, then sit back, enjoying your early retirement.³

3 When this inevitably spirals out of control, uses up all the Earth’s resources, and destroys humanity, I hereby agree to accept the blame.

I do expect to see more AI tools facilitating easier communication between people, handling basic questions, and amplifying the skills of the support team to hold more useful conversations with less effort.

Read more:

- [GPT-3 and AI in Customer Support](#)
- [Why You Don't Need an AI Support Chatbot](#)
- [AI, Curiosity, and the Future of Human Customer Service](#)

The poor workman

If tools solved problems, we would all have rock hard abs instead of basements haunted by the dusty, skeletal remains of 83-in-1 home gyms.¹ It doesn't matter how good the tool is if you don't use it — or if you misuse it. That goes for help desks and customer service platforms, too. We sell an excellent one I would dearly love you to [try for free](#)² if you're not already a customer.

The right customer service software can reduce customer effort, remove friction, add new capabilities, and help you avoid mistakes. It can make doing the right thing at the right time easier. But it can't make your CEO emotionally invest in a better customer experience. It won't change your inflexible replacement policy or lay out the perfect product roadmap for you.

My latest Ask Help Scout column responds to a reader facing those sorts of challenges, namely [how to shift a company toward a more customer-centric mindset](#) when the people at the top don't seem interested. The answer is never going to be found in those software feature checklists. It comes down to humans, not help desks.

Succeeding as a customer service leader demands more than the ability to deliver high-quality service. You will need to understand how to persuade others and [how to use your reporting data](#) to tell a compelling story that inspires action.

You'll need good tools, too. Well designed, thoughtful, high-quality tools make life easier for your team and for your customers.

Just don't stop there.

Read more:

- [11 Key Customer Service Metrics + 4 Real Example Reports](#)
- [How To Make the Most of Your Customer Support Data](#)
- [Help Desk Software: What To Look For and Must-Have Features](#)
- [Changing a Company Culture](#)

1 And if tools solved problems, I might even have written something in those fancy notebooks that silently mock me every time I open my desk drawer.

2 Or another try, if you haven't seen Help Scout in a while. [A lot of capability has been added](#) over the last couple of years.

Shall we play a game?

“We now have machines that can mindlessly generate words, but we haven’t learned how to stop imagining a mind behind them.”

Emily M. Bender,

Linguistics Professor at the University of Washington

Technology allows many of us to work, buy, play, learn, and connect remotely. But those connections are imperfect; they leave a gap between us which text may cross but that meaning too often falls into.

Facial expressions and tone and posture are all lost; even video chat compresses us into two dimensions. Technology strips away parts of our human whole at the same time it is enabling software that sounds convincingly human.

The differentiation between human and computer, at least for online interactions, is shrinking from both sides at once. In customer service, that translates into a confusing (and depressing) crossover between the most effective AI support tools and the most highly scripted, least adaptive human support.

When that distinction blurs, customer behaviors change. If you are not talking to another human, then why bother being polite?¹ That can lead to a sort of support solipsism: If I’m the only real person in this conversation, then only my needs matter.

Personally, I never want AI to pretend to be human. There is no benefit to me as a customer, even if an interaction goes perfectly. If it goes poorly, the failures of the technology can end up on the shoulders of humans who have to prove their own sentience before they can even begin to help.

¹ I say thank you to Siri, but not to an ATM. How about you?

There is a balance to be struck between the desire to stay on brand and consistent as a company and being flexible, adaptable, and human as individuals. Those lines are not static, and we must all draw and redraw them in our own contexts.

And as for the idea of entire corporations having a single voice and even legal personhood... well, that is a topic for another time.

Read more:

- [Will AI-Powered Customer Service Replace Your Job?](#)
- [AI, Curiosity, and the Future of Human Customer Service](#)
- [The Only One Business Show: Podcast episode with Mat Patterson](#)
- [Is Google's LaMDA sentient, and if so would it like a job?](#)

Systems and values

Given a choice, most of us would prefer to deal with customer-centric companies as a customer and as an employee. These are the companies that spend time and money on customer needs and their long-term success rather than short-term profits or blasting their founder's ego into Earth's orbit.

Those companies are not easy to find. The non-customer-centric companies don't tend to shout about it on their websites or job postings. To find the good ones, you will have to dig a little deeper.

Even to talk about "a company" having the ability to care about customers is misleading. Every company is made of people with differing worldviews and attitudes. The behaviors we attribute to "the company" emerge from the complex combination of those people and the systems, policies, and processes that have developed over years.

Founders, owners, and leaders create organizations that reflect and amplify their own beliefs. Sometimes that is readily apparent: Musk, Murdoch, and Bezos' puppeteering their respective companies like multinational Pacific Rim mechs. If their current beliefs happen to coincide with positive outcomes for some of us, the impact can be enormous — but it never feels permanent.

Most of the time it is not so obvious, with the influence of the most powerful inside the company leaking out more subtly, such as in the freedom and empowerment of customer service to actually help, or, internally, in unspoken rules about not using sick leave. Moral leadership matters.

It is so hard to make good choices on how to spend our time and money. There is never a single correct answer — at least not one that lasts.

Too many people are not afforded the luxury of choice in their employment or their purchasing. For those who are, investing in customer-centric organizations is good for everyone.

1 Amazon is famously customer-centric, yet it treats its workforce appallingly. That suggests that it might just be profit-centric and that the customer-friendly policies will last only as long as they appear to be "working."

WYSIWYCS*

* What You See Is What You Can See

We share our garden with chickens and bees, who pay their portion of the mortgage in eggs and honey respectively.

Both chickens and bees can see in ultraviolet, and flowers have adapted to use ultraviolet pigment, invisible to humans, to attract and guide their pollination partners. The people and the animals in our household literally see flowers differently, so we value them for different reasons.

We tend to think that what we perceive in the world is the world, but we are only ever seeing one subset of all the possible perspectives.¹

Our customer support queues are similar. What you see when you look at your inbox of support queries is not exactly what anyone else sees. Each person has their own areas of specialization, focus, and past experiences that may, for example, help them spot abnormal patterns or critical issues.

An account manager might spot subtle signs of imminent churn hidden in an otherwise innocuous question. Your lawyer is alert to legal risks invisible to most people. And a skilled salesperson can identify just the right moment to offer another option.

Thanks to language, humans can share that sort of disparate information with each other, and we can learn to extend our senses with new capabilities.

If you want to become a more valuable and more effective customer service professional, look for opportunities to develop those other “senses.” Learn how your colleagues in other departments think and the signs they look for. You don’t have to become a sales rep, but you can learn how to anticipate a need and be more persuasive.

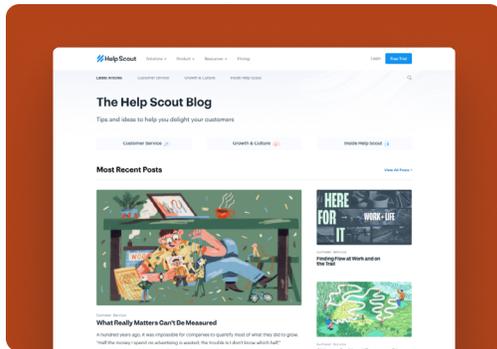
¹ Animals have unique ways of perceiving reality, sensory environments called umwelten. Dolphins echolocate and elephants use infrasonic sounds, for example.

Make use of technology to extend your perception by pulling other perspectives into your queue, and by using internal notes and contextual data. Technology is at its best when enhancing, not replacing, the decision-making capabilities of people.

Read more:

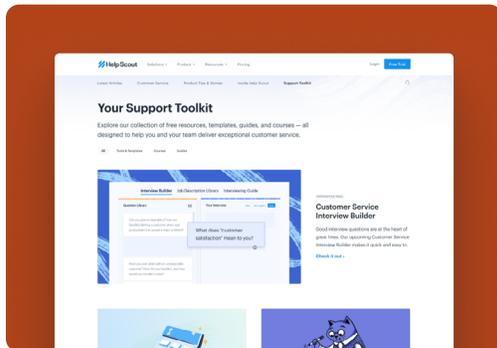
- [Work For Customers, Not Personas](#)
- [How To Write a Good Internal Note](#)
- [Support, Sales, and Marketing Need to Work in Harmony](#)
- [Customer Success vs. Account Management: Why Both Matter](#)

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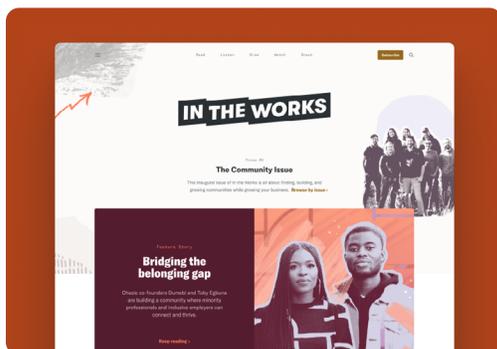
The Help Scout Blog

Get tips and advice on delivering exceptional customer service, engaging and delighting your customers, and building a customer-centric company.



Your Support Toolkit

Explore our collection of free templates, guides, courses, and resources — all designed to help you and your team deliver exceptional customer service.



In the Works

Fresh, new founder stories, growth articles, audio interviews, and videos from a wider, more inclusive range of voices and experiences. A place for curious, thoughtful, mission-driven leaders.