

## Customer Care Best Practices

1. ***The importance of providing first-class customer care should not be underestimated.*** One happy customer will tell one friend, an unhappy one will tell many friends. Making sure your customer care is built to exceed your customers' expectations will translate into more repeat buyers as well as more new customers. How to improve your customer care operations, however, can be the source of long debates. Better management practices internally, newer/better technology and outsourcing can all contribute.
2. ***Whether in-house or outsourced, an effective call center system makes all the difference.*** Often call centers are built with suboptimal tool sets that don't empower the customer service representatives (CSRs) to effectively help customers. Without these tools, CSRs are relegated to "telephone answerers" with no capability to help customers. Outsourced call centers require even better tools and oversight to be effective.
3. ***In-house call centers, domestic outsourcing or off-shore outsourcing all have costs, benefits and risks.*** All require significant management attention. Develop and review quantitative models with your executive management team based on tracking metrics before undertaking any major effort in this area.
4. ***In evaluating in-house vs. outsourcing, remember that recruiting and initial training for internal CSRs can range from \$3,000 to \$10,000 (or more for technical or specialized areas).*** The total cost of having an internal call center is easy to underestimate. However, if properly planned, monitored and executed, it can be less expensive than outsourced. If these are not done well, the cost will dramatically increase and be more than outsourced.
5. ***Your company knows your products and customers best.*** Outsourced call centers will never know your products and customers as well as you do. They will be able to perform most activities, but the personal, consultative and brand communication touches will never be as strong.
6. ***Outsourced call centers can scale faster.*** Outsourced call centers can easily add CSRs as well as cover all time zones, after hours, and weekends. Internal call centers require multiple shifts to support the same hours and take longer to scale to meet these extended hours. Thoughtful demand forecasting is critical.
7. ***Use a multi-channel approach to all areas of customer contact: phone, chat and email.*** While different CSRs may specialize in different tools, they should all have access to the same data. Keep them focused on one medium at a time, however. It's inadvisable to chat and talk at the same time.
8. ***Evaluate the use of chatbots.*** Leveraging chatbots can help automate some customer inquiries, reduce costs and free up customer service reps for more complicated customer service tasks.
9. ***Take the time to monitor random customer care calls yourself, whether in-house or outsourced.*** There's no better or more immediate feedback as to how you're doing. Calls and chats can be saved so that you don't have to do it real-time. But always schedule time to regularly monitor these calls.
10. ***Treat CSRs well and recognize them publicly.*** They are on the firing line when there are problems and often deal with unhappy customers in difficult situations. Handling all that conflict can take its toll.
11. ***Calls into your customer support center can be opportunities for additional revenue.*** Develop a plan to properly incentivize CSRs to create sales. Include a sales or promotional message at the bottom of their email communications to customers.

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# eCommerce Diligence™ Checklist

## Customer Care Key Questions to Ask Providers

### Company

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1. Do you sell the technology and/or do you use it within your call centers?
2. Where are your call centers located?
3. What is the language proficiency of overseas operations?
4. How many clients have you sold? How many have you lost, and why?
5. What size or types of clients fall into your “sweet spot”? Do you specialize in customer support/service or sales? Any key verticals?
6. What peripheral or support services do you offer (e.g., integration, CRM, consulting services, training)?

### Products/Services

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1. If you're offering technology to improve my call center operations, is your solution offered as perpetual licensed software or on-demand SAAS solution?
2. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?  
**If perpetual license:**
  - a. What are the hosting requirements?
  - b. What should I expect regarding upgrades (both timing and pain)?
  - c. Do you provide customization/implementation services?
  - d. Can a third party provide customization/implementation?**If SAAS/ASP:**
  - a. Do all tiers include maintenance and support?
  - b. How often are new features introduced?
  - c. What do I do if I need a feature you don't have or plan to have soon?
  - d. What internal resources will I need to maximize the value of your product?
7. If you're offering an outsourced call center to take over or supplement my customer care operations, how does your model work?
8. If providing call centers, do you provide the technology for your call centers or can you use our technology?
9. Can we validate your CSRs, on product knowledge, English proficiency, etc., prior to assigning them to our account?
10. How much time/effort will be required on our part to train your people?
11. How will our company institutionalize the knowledge that your CSRs gather during the support process?
12. How do you use technology to optimize your services?

### Features

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1. What key features are included in your solution? What features are currently missing? What is the upgrade schedule?
2. What components of the acronym mix do you provide? IVR, CRM, ACD, VOIP, etc.
3. Does your solution offer chatbots?
4. Does your platform publish and support APIs for integration with other systems (such as CRM, trouble ticketing, customer management), if I choose not to use your modules? If not, how do I integrate?

### Pricing

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1. For technology providers: do you charge by the user/month or perpetual license?
2. How do you charge for annual support? What about maintenance?
3. For outsource partners; do you charge by the hour, by the dedicated CSR or some other model?
4. What are the setup/training fees? What happens if calls to the center exceed forecast? What “value-add” services do you offer?

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