

How to Train Your Customer Support Assistant



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When it comes to customer service, there are no do overs!



Congratulations on growing your business to the point where you are about to hire a Customer Support specialist. You'll free up a lot of valuable time that will enable you to focus on money-making activities you're passionate about and best suited for, while your administrative tasks are taken care off efficiently and professionally.

But it doesn't matter how experienced your new Customer Support person is: There are going to be methods, procedures, preferences and details unique to your business. Plus, you'll want to make sure you are both on the same page when communicating, in a style that easily works best for both of you.

This report will reveal tried-and-true techniques for training your customer support person so that the two of you make a dynamic, efficient and formidable, powerhouse team.

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Step One: Communicating Effectively with Your New Customer Support Person

Great communication is not some mysterious attribute gifted to only a fortunate few: It's something every business owner can experience with his or her support staff.

Great communication can be boiled down to the following two, key elements:

1. Setting up a system for how communication is handled
2. Sticking to it

Find out your support person's preferences and let her know what yours are. See where you both align in perfect harmony (e.g. you both prefer communication strictly through the BaseCamp project management system) and where there may be problems or conflicts (she expects to be left alone until a task is completed: You want a project update after every step or change).

Then decide how you are going to resolve these rough spots in your process.

1. Mistakes and the Right Way to Make Them

Decide also how you will handle mistakes she might make. Experts unanimously agree that a "no blame" policy is best on your part, focusing on:

- What happened

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- How it's going to be fixed/what needs to be done
- What you will both do or immediately institute to prevent it from happening again

In turn, you need to look for a support person, who strongly believes in accountability; one who will unhesitatingly admit to any mistakes.

One effective way to check for this, when hiring: Present your candidate with a "mistake" scenario and ask how she would handle it. Specifically listen for words such as "accountability" and "personal responsibility" in her response.

Decide also in advance (and add it to your written contract):

- Whether or not your Customer Support rep can speak for you or you expect her to run back to you to get permission for every case
- What items or actions will need to be cleared by you; and when she can use her own discretion
- If she can make financial decisions and what the limits are (e.g. refunds up to \$100; substituting new product for defective)
- What leeway she has in solving problems without consulting you
- How you would like her to handle problems specific to your business
- If she is producing work for you, how many changes you expect to make before paying extra
- Whether or not you expect her to work weekends or overtime

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- If she is willing to work overtime without extra charge in order to solve a crisis caused by a mistake on her part
- If she understands these stipulations and agrees to them

Having all these parameters and details in writing protects both of you **and removes the personal element** from small and large catastrophes. Knowing what is expected (on both sides) virtually positions you both into focusing on problem-solving, instead of counter-effective blaming-and-shaming.

2. What Needs to be Decided

There are also basic elements of communication you'll need to decide on, based on what works best for both of you... such as:

- Your preferred method of communication (telephone? Email? Fax? In person? Mobile SMS? A combination of these?)
- How many times per [day/week/month/project] you expect her to touch base and update you with progress
- Setting fixed, crucial points within projects that produce automatic check-ins (e.g. letting you know that printing is a "go" on the 13th of every month; even when there isn't usually any sort of hitch to worry about; or confirming that she has received your transmission)
- Understanding your support professional's specialties. (Are you expecting her to handle setting up and running all your

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webinars, when she specializes strictly in Help Desk functions?)

- Whether or not you want her to interact with your customers or clients beyond your Help Desk

Factors affecting your decision might be based on:

- Your relative location to each other
- Whether or not she is local enough to visit your place of business (for meeting, for training, to perform tasks, etc.)
- Your relative Time Zone to each other – for instance, if she works out of Australia, you most likely won't want to set telephone communication as your primary means of contact, since most of the time she'll be working while you sleep (and vice versa)
- What kind of support person you're getting. (Does she specialize in Live Chat, but has never used any type of email-based Help Desk system?)
- Whether or not she provides a "bonus" service, such as doing all your copywriting for you on top of the customer support you're hiring her to cover
- How she likes to work
- What she does & how she does it

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Believe it or not, a surprising number of people hire first... then find out these details later: Mostly because they don't know what questions to ask before hiring.

But even if you missed a few things when deciding on your support person, having a system in place and training her to use it can eliminate a host of potential problems

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Step Two: Things They Need to Know

You can save your new support person much time and grief by filling her in quickly and easily on **where to get information she'll need** to do her job – information specific to your niche, industry and business.

Make sure you cover these basics:

1. How You Do Things

The best way to ensure your new support professional takes over that aspect of your business seamlessly is to provide her with an **Operations Manual**.

Your Operations Manual should contain such things as:

- Your Mission Statement for your business (focusing on what you are promising your average customer or client)
- A statement of what you do (for your average customer or client)
- A non-disclosure agreement for your customer support person to sign, if she's going to be dealing with highly confidential areas of your business
- Your official policies and procedures (e.g. "Refunds will only be given if the customer provides a faxed or emailed copy of the receipt, dated within the thirty-day period after the sale".)

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- A list of the systems, software and URLs she will need
- All login information (usernames and passwords, etc.) that your support professional will need to run your customer support
- Where to find customer/client records and data
- How to update them for consistency and maximum clarity
- How and where you are both going to store data (Google Docs? A commercial, hosted project management system?)
- How and where you are both going to back up data (WordPress plugin? On your server? On her server? CDs?)
- An FAQ section, giving her your preferred answers to common questions you've encountered
- Dos and don'ts when communicating with customers or clients
- Dos and don'ts with regard to your business
- What your specific business rules are (Ex: It's acceptable to refuse to serve someone via telephone, if they are swearing or being otherwise verbally abusive, but you must first advise them you are going to disconnect if they persist in personal abuse and give them a chance to stop. It is not acceptable for you to swear or be verbally abusive to even the most irritating customer.)

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- Acceptable payment options
- Your business hours and hours of contact
- Any restrictions (Ex: The business is closed on Sundays. Please contact only by email on that day and understand no reply will be forthcoming until the first business day of the week.)
- How and when you will both communicate (and how often)
- A list of relevant, regular deadlines she'll need to know
- Anything else you can think of that would be helpful for her to quickly refer to

In addition to this, make sure you provide her with other relevant documents she will need, such as sets of Email Templates for sending back standard responses.

2. Where to Get All the Latest of Everything

Your customer support professional will also need to stay on top of all the latest happenings in your niche area or industry – particularly if you are planning on becoming a true, "behind the scenes" business owner.

Add to all the resource material you're planning to give her (Operations Manual, FAQ sheet, login info, etc.) a list of all your best industry links.

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For example, if your business is tech-based, you might want to include links to authority blogs that provide the most up-to-date, tech-related news, such as:

- [Technorati](#)
- [Lifehacker](#)
- [Mashable](#)

As well as **access or membership to private forums** you find useful, when conducting customer research or interaction.

You might also want to provide a **list of preferred affiliate links** for recommended products/services that your support professional can give out as requested.

3. [How to Best Represent You](#)

You also need to know and discuss in advance whether or not you expect your customer support professional to **stay strictly behind the scenes...** or **become your "public face"**.

Regardless, when she deals with customers or clients, the tone of her communications will have to **match your tone**. For example, are you informal, chatty and friendly?

Your regular subscribers, customers and clients already trust you precisely because they are drawn to informal, chatty and friendly.

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If your support professional is formal and impersonal, they will quickly lose confidence, complain that things "aren't the same as when [your name] was running it" – and go elsewhere. It won't be your support person's fault; you simply neglected this factor when hiring or training.

Are you dealing with a clientele of high-end professionals in finance, all with six figure incomes? Hiring a chatty, informal support professional is going to feel like hiring an unprofessional to this unique demographic – who typically don't waste time on small talk, ask penetrating questions that cut to the heart of things, call a spade a spade – and who want instant results without all the personal stuff. Saving time is their biggest priority, not chatting about the weather.

On the other hand, if you really just need someone to process refunds as quickly as possible, you will most likely want to hire a support person who is deliberately all business and no "personality".

And if you're hiring your support person to provide Live Chat support, you may wish to hire someone with Call Center customer service credentials and experience – particularly if she's your only operator.

You'll be paying to use the Live Chat service, so you'll want someone who can solve the maximum number of client problems

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as quickly and professionally as possible – without driving clients away.

It's all about knowing your own "voice", what your customers and clients expect and exactly where you want your new support professional to fit in.

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Step Three: Make the Transition as Smooth as Possible

Another crucial issue to consider: If your business is switching from having you send those chatty customer service emails yourself to your support professional being your new "go to" person and voice, you'll want to make it:

- Easy for your customers/clients
- Easy for your new support professional
- Easy on you!

Having a system in place – an Operations Manual and FAQs that your support person can study and refer to on the spot – will go a long way towards ensuring this happens smoothly.

You will also need a plan to **introduce** your new support person:

- Are you going to have her write guest posts for you first?
- Will you both hold a joint webinar to answer your customer or client questions?
- Should you introduce her via your social media or forums?
- Will you write a guest post about her?

Whatever you both decide to do in the way of introduction, create a plan and follow it. **Position** your new custom support person for success.

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1. Her Work History and Personality

One other factor you'll need to be aware of from the start: Her work history and personality.

Check every reference. Don't skip this step. You need to make sure you won't put a lot of time, effort and maybe even expense into training her – only to have her quit on you two months later. A little homework will help reduce this risk to a minimum.

2. The Right Tools

You'll also need to make sure she's up to not only using the same software and systems you use, but is familiar with the unique quirks or settings in the way **you** use them.

What should you do if, in all other respects she is perfect but admits she has only a minimum knowledge in operating a software system you use and that is vital to your business?

Provide paid training, if she needs it. Factor that into your budget from the start. Remember, you'll need her to:

- Help your clients troubleshoot that system, if its one you use for your membership site, self-serve graphics business, coaching business, etc.
- Solve problems quickly and keep up the flow
- Keep her work mistake-free

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- Save valuable time by running your systems efficiently

Also, training should never feel like a chore: Something she has to endure or something you're doing to correct inadequacies. It should be as exciting and confidence-building as possible. Your message is: "Hey, I think so much of you that I'm making sure you have everything you need to do the fantastic job I know you're capable of."

You are **making an investment** when you hire your new support professional. Set that investment up for maximum yield and success.

3. Don't Leave Gaps

Make sure there are no "gaps", when she comes aboard. Have a checklist ready: Ensure she has all the tools she needs, as well as the necessary skills.

4. Respect and Trust

Another key element will be your attitude towards your new support person. Don't hire her and invest in all her training, only to micro-manage her afterwards. Yes, it's hard to give up the reins when you've been used to doing everything yourself – but you're going to have to take that plunge.

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If you've set everything up according to plan and taken care to hire the right person, it's going to be more of a hop: A non-event, one which leaves you sitting back and sighing with relief.

You've hired a professional: One who is an independent business owner, like yourself. Treat her as an equal, because she is one. You and she are pooling your talents

Besides, the more you trust her by sticking to the policies and procedures you've carefully set up, the more she'll feel **empowered**. And when people feel empowered, they do a much better job!

5. Fitting In

If your new customer support person is also going to be responsible for managing other contractors or assistants you use, you will need to make sure all of the above applies to them, too.

- Position their new team member in the best light. Show them how she is going to make their lives easier.
- Communicate! Let them know what's happening, when and how.
- Support and show her that you have confidence in her decisions.

Your aim should be that your other contractors, staff, customers or clients all regard talking to your support professional with exactly the same confidence and trust they share with you.

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Step Four: Mistakes Not to Make

While it's great to focus on the positive, there are also some things you need to consciously avoid if you're not used to working with another person. You can do all the wonderful things we've talked about and then unconsciously sabotage yourself (and your business) by making blind assumptions. The following cautions are here to alert you to some common problems:

- 1. She is not at your beck and call.** If you want instant, unscheduled service, be prepared to pay... and be prepared to take a "no" answer. After all, she's self-employed online so that she too can enjoy work flexibility and balance time with family. She owes you only the hours you've agreed on, unless you've specified (and she's agreed) that part of the job entails being "on call" after hours.
- 2. Keep her in the loop.** If you decide to change an element of your business, make sure you have a system in place that naturally leads you to communicate that change to her. If you decide to scrap something, make sure she knows. If you change your policy on refunds, send her an updated page to your Operations manual.
- 3. Do it in writing.** It's best if you document changes in procedure. People go by habit. They forget... and then it's: "Well, you never told me about that!" If you can point her to a memo or send her the project change link on BaseCamp, that quickly defuses suspicion or irritation.

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She can look at the change in black-and-white and say: "Whoops, sorry. You were right. I'll give them sixty days from now on." No personalities, no grudges. (And besides, you might be the one saying: "Whoops, sorry. I did say that, didn't I?")

- 4. Never assume.** Assumptions are the enemy of harmony. They're also the enemy of smooth sailing. An assumption can leave you high and dry, out of the water, and break that vitally smooth flow in your sales funnel that you hired your support professional to maintain.

For example, you assume that your support professional knows enough to set up a separate download page, if that's part of her job. But you find out, when complaints start appearing on Facebook, that she's been sending digital product directly through email, and half of it seems to be getting caught in people's spam filters.

Now, granted, that particular mistake is not something the average competent support professional would ever make – but don't assume! Make sure, when you're setting up your Operations Manual, that every "t" is crossed and every "i" dotted. Just writing out steps simply and plainly can sometimes save a lot of grief.

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In Conclusion

If you follow the tenets laid out in this report, you will save more time and money than the extra work in setting up your procedures and preparing for a smooth transition cost you.

Remember, the overwhelming majority of people who drop a business and go to the competition do so because of:

- Interruptions in sales funnel flow that makes them lose confidence
- Poor customer service

Your new support person is going to be the best investment you could ever make in smoothly growing your business. So make sure she is positioned for success and the two of you will truly become a Dream Team!