

# LESSONS UNLEARNED



25 YEARS IN CUSTOMER SERVICE

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## Introduction

Customer service is of particular importance in the technology industry; customers rely on technical support services when they have a problem with a piece of hardware, software, or a consumer device. The current darling of the technology industry is Apple, and you don't have to go farther than the Genius Bar at your local Apple Store to see how Apple approaches customer service, creating a fantastic customer experience that ensures rabid fans. Most people think of customer service as a department, but customer service is also a technology industry all on its own.

This book gives an insider's view of the customer service industry, providing insight for those battling mediocre service every day. If you understand the tools, vocabulary, and metrics that power customer service, you can definitely demand better service from your providers. For those already working in customer service, this book will provide you with some new best practices, worst practices to avoid, and maybe even a laugh or two along the way.

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# 1

# Stewardship

*stew·ard·ship (noun)*

*'stü-ərd-,ship, 'styü-; 'st(y)ürd*

- 1. the office, duties, and obligations of a steward*
- 2. the conducting, supervising, or managing of something; especially: the careful and responsible management of something entrusted to one's care <stewardship of natural resources><sup>1</sup>*

I'VE BEEN LUCKY TO HAVE SOME AMAZING MANAGERS IN MY CAREER. When JCPenney decided to build a new corporate headquarters in Dallas, they relocated many corporate operations, including the old headquarters on Sixth Avenue in New York, as well as the IT and development teams, which had always been located in the Atlanta regional office. NFSC was part of that relocation, and while many of my Atlanta coworkers opted not to make the move, I accepted a transfer and a promotion, reporting to work in Dallas as a team manager. The founder of the NFSC, Herm Brinkman, was near retirement and did not make the move to Dallas. Our new manager was a former JCPenney store manager from the Seattle area, Dean Wortham.

I will never again have a manager as kind and caring as Dean Wortham. As a newly minted manager, I needed help, and in his always-patient way, Dean taught me a lot about being a good manager, and a few lessons about being a good person as well.

As Dean assumed management of the NFSC, renaming the Dallas incarnation the Store Systems Hotline, or SSH, he talked to the management team—and the entire department—about

stewardship. Stewardship meant that there was no more “us and them” attitude about customers. We were responsible for these stores and their customers. If the point of sale systems went down, it cost stores—and the company—thousands of dollars a minute in lost revenue. Dean helped us all reconnect to the stores, not as overlords, or even slightly superior corporate employees, but as caretakers, parents, big brothers and sisters. We grew to have a new attitude toward store employees as we felt personally invested in their success—a much different scenario than being a condescending support representative.

### **Love the Customer**

Dean started two campaigns to build an environment of stewardship. The first was “Love the Customer.” In the Atlanta days of NFSC, most of the support techs had some background with JCPenney stores, either having moved up through the store ranks as I had, or having worked with stores in another JCPenney corporate department, such as the catalog or controllers division, before coming to NFSC. We had been through the customer service training provided to store employees, we had an intimate relationship with the retail side of the business—and firsthand knowledge of retail customers—so the concept of stewardship, and loving the customer, came pretty easy.

Unfortunately, instilling the concept of stewardship into some of the new employees at the Dallas Store Systems Hotline was more difficult. Since the majority of NFSC employees did not make the move to Dallas, we had to hire a large team of support technicians very fast. And instead of the traditional approach of recruiting tech-savvy store and corporate employees, we hired newly minted graduates with degrees from a technical school that operates as a degree mill. Having no history with the company, no familiarity with the company’s retail operations, and no “working their way up” to land a tech support job, these employees did not empathize with store employees; in fact, they tended to be

condescending. They didn't love the customer; they treated them as an interruption. And many of these new hires were very open about not planning to work in tech support for more than 1 to 2 years before expecting a promotion to a development role. Their current job was beneath them.

For those of us who saw working at the support center as a desirable job, dealing with these "short timers" wasn't easy. They didn't value the work we did, and as a result, they didn't have a very good work ethic about being on time, customer service skills, or employee productivity. While Dean's Love the Customer campaign was more challenging than I initially thought, we did turn some of those employees around. How? We had store employees come in for tours and talk about what happened at the store level when the registers went down. We took groups of support techs on tours of local JCPenney stores so support employees could better understand the retail operation and the stress of having face-to-face customers. We had district and regional managers come in to talk to the support techs about the importance of technology and the role of the Store Systems Hotline.

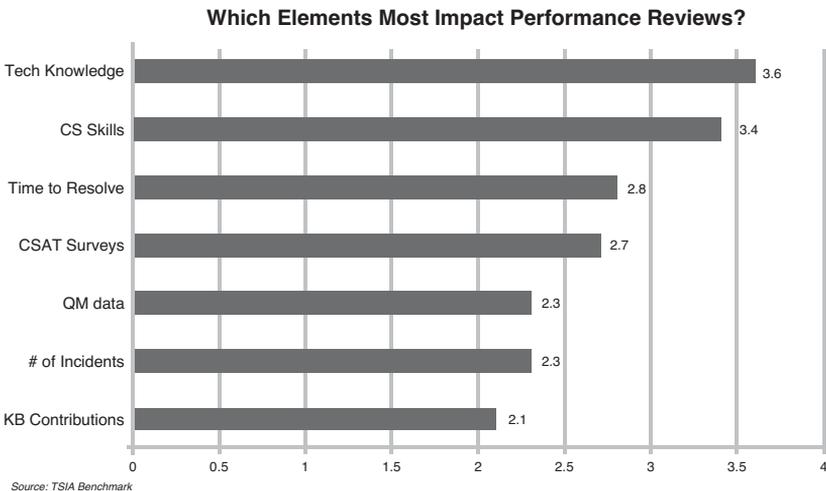
If you want employees to love the customer, you have to start with employees who are capable of loving someone—besides themselves. This meant we needed to hire the right support techs in the first place, and after that initial crowd of new college grads, we started incorporating more screening for customer service, soft skills, temperament, and attitude into the hiring process. And we expanded training to include more guidance on working with customers, including phone training using real scenarios of difficult problems and difficult customers.

This was not the last time I encountered support employees who did not have the people skills for the job. In fact, in later years when implementing knowledgebases for support centers around the globe and doing audits of support center best practices as an analyst, I've frequently found support groups with multiple

employees having bad attitudes about a support role and some level of condescension for the customers. In these environments, there is a whole of set of problems I know I will find, including CSAT challenges and high employee turnover.

The Technology Services Industry Association (TSIA) asks members a survey question about which support employee skills have the most impact on performance reviews, and the results are interesting, as seen in *Figure 1.1.1*.

Technical knowledge is the single most important employee skill, rated higher than customer service skills, customer satisfaction surveys, quality monitoring data, and productivity. Personally, I think this is the root of many problems in our industry—overreliance on technical ability and shortchanging customer service or “soft” skills. My time at JCPenney showed me that non-technical employees with fantastic people skills and an aptitude toward technology can easily be taught complex technology. But technology whizzes with little or no social skills will never become warm and empathetic on the phone, no matter how much soft-skills training they receive.



**Figure 1.1.1:** Which Elements Most Impact Performance Reviews?

## Love the Employee

Dean's second campaign to build the concept of stewardship was for us managers: "Love the Employee." A departure from the traditional autocratic view of the manager/employee relationship, Dean wanted us to recognize employees as people and make sure they were fulfilled in work and in life—within our power of influence, of course. We started multiple programs designed to recognize and celebrate employees, including an Employee of the Month program, complete with an annual dinner to name Employee of the Year.

At the time, I was attending night school, working on my degree in management, learning about the then-popular Theories X, Y, and Z, and I was eager to try out new programs to recognize and reward employees. One of the popular theories at the time was "management by walking around," which meant getting out of your office to interact more with employees, understand their workload and performance better, and hopefully coach them on small issues before they turned into big issues.

Dean encouraged management by walking around, as well as another popular management approach at the time, "catch them doing something right." We had certificates for a free lunch or a free muffin from the company cafeteria printed up, and when an employee went above and beyond, we immediately rewarded them with a certificate. Some employees were so happy to be acknowledged that they stapled those certificates to their cubicle walls instead of cashing them in.

Not only did these programs help improve morale, but they also gave us managers a much better idea of what was really going on among our teams. Dean Wortham had fostered an environment in which employees felt comfortable asking for help, and the reward systems turned out to provide positive reinforcement for the desired behavior, so some of the undesired behavior lessened over time. I certainly felt more personally invested in the needs of my employees because of Dean's Love the Employee campaign,

and I think I've become a much better manager over the years because I learned early on to treat employees like people first, and to think of them as individuals—not cogs in the wheel.

Another valuable lesson I learned from Dean is that giving employees correct assessments of their performance on evaluations was incredibly important. Part of loving the employee is giving them factual, actionable, and constructive feedback, and sometimes a little tough love is required.

I had inherited an employee who was a bit of bully, and while she was a knowledgeable support technician, she was rough around the edges, difficult to work with, and flew into a rage when offered any constructive feedback. As a result, for years she had been given higher marks than she deserved on performance reviews because managers were afraid of the tirade that would erupt if they rated her below “exceeds.” I was not afraid of the tirade and gave her a fair assessment of her performance. There were tears, there was shouting, and there was an uncomfortable tension for about a month afterward. But ultimately, the feedback helped.

We had a lot of problems with employee performance evaluation “inflation” at that time, including some of the degree-mill “short timers” whose managers rated them higher than they deserved so as to not create conflicts in the workplace. In other words, these employees did not take constructive criticism well since they thought the job was beneath them anyway, so managers gave them higher ratings than they deserved in order to avoid arguments.

It turns out that many managers approach performance reviews hoping to avoid drama—that inevitable blowup that occurs when an employee is faced with an assessment that in no way matches their own self-assessment. If you love your employees, you are truthful with them. If you don't point out their growth areas, they won't grow, and they become bitter over time as they feel more isolated and unappreciated, yet have no constructive feedback on how to improve. However, employees should never

be blindsided by a performance review. Whether it is uncomfortable or not, managers must give ongoing coaching to employees, including constructive criticism. Employees should never be confronted with a performance issue for the first time during the annual review.

I think about customer service and stewardship a great deal today, especially when as a customer I receive treatment that clearly indicates I'm not dealing with someone who has ever been told to "love the customer." The bored or impatient phone rep who sighs when you ask a question. The retail employee who ignores you at the register because she is talking or texting on her iPhone. The restaurant server who rolls his eyes when you ask for something. Honestly, as a customer, I don't feel the love all that often.

After all these years, when I look back at Dean Wortham's leadership, I realize how lucky I was to have learned some key lessons so early on in my management career, and I hope I can pass some of them along to you. So consider this your first lesson: If you don't have the capacity within yourself to love the customer *and* your employees, then customer service is definitely not the career for you.

## « Key Lessons Learned from Chapter 1 »

It takes a special person to be a customer service star. You have to be empathetic. You have to be patient. And you have to be able to love the customer, every day, on every interaction. Indoctrinating support employees from Day One that their primary job is stewardship is a great way to promote the right attitude. With that in mind, I would like to recap some key lessons learned from this chapter:

- **Support as stewardship.** Support employees often become lost in all the performance metrics related to the job and forget about the human side of customer interactions. The role of a support employee is to be a steward for customers—a caretaker, a trusted advisor, a lifeline when things go wrong. This is a serious obligation, and you should screen prospective employees to see if they are able to accept this obligation willingly.
- **Not everyone is empathetic.** If you want employees to love the customer, you have to start with employees who are capable of loving someone—besides themselves. When interviewing prospective support agents or technicians, look for volunteer work, social interests, awareness of world or political events, or tight ties to family and friends. All of these indicate the candidate is not self-absorbed and has the potential to be a steward to your customers.
- **Importance of ongoing soft-skills training.** Many technology firms overemphasize technical ability and shortchange customer service or “soft” skills. While answering a question correctly is critically important, if the employee can’t communicate effectively with the customer, the interaction will be uncomfortable for everyone involved. Soft-skills training is important up front, with refreshers annually, as well as ongoing coaching for employees whose satisfaction scores indicate that

they are not connecting with customers or are not being perceived as caring.

- **Recognize and celebrate employees.** Managers often forget what it was like fielding calls and e-mails from upset customers for 8 hours a day. Support employees have a stressful and emotionally draining job, and they need to know that they are appreciated and valued. Since they don't always receive that positive reinforcement from customers, it is your job as a manager to provide it.
- **Catch them doing something right.** Managers are trained to look for infractions of rules, policies, or recognized best practices and immediately correct the behavior. But don't get so caught up in policing for bad behavior that you forget to celebrate great behavior. What I have learned is that instead of correcting people doing something wrong, it is sometimes more effective to identify a worker doing something correctly and hold them up as an example. You get the same point across without singling out anyone for being incorrect.
- **Offer factual, actionable, and constructive feedback.** No one should ever find out that they are doing something wrong by reading a performance review. Whether you have formal one-on-one time scheduled with employees or you handle feedback on an ad hoc basis, address small issues before they become bigger issues and don't pull punches with constructive feedback. But remember that feedback must be constructive. Don't just say what they did wrong—instead, explain why it is a problem and how to do it correctly. If employees understand the positive business impact of the correct behavior, it is easier for them to comply.



## TALES FROM THE VAULT: MAGIC SLATE THERAPY

Let's face it: There are a lot of rude people out there, and unfortunately, sometimes they need support. Regardless of how much training or experience you have in dealing with difficult customers, sometimes they can really get under your skin. It is important that employees have some way to release frustrations when handling rude, condescending, aggressive, hostile, and sometimes profane customers.

An easy and low-cost solution is what I call Magic Slate Therapy, which I learned from LuAnn Rollins, a coworker from the JCPenney NFSC in Atlanta. Remember those magic slates from your childhood? Some kind of clipboard affair with a sheet of plastic you could write on and your words appear, and then by pulling up the sheet of plastic, everything is completely erased?

LuAnn and I both kept magic slates in our desks, and when we were on the phone with a real piece of work, we would write exactly what kind of person they were in big letters on that slate and hold it up high so everyone could see. We instantly received thumbs-ups and “hang in there’s” from teammates, and by venting, we were able to release the anger and concentrate on solving the problem and hopefully getting the customer back on track as quickly as possible.

Over the years I've bought dozens of magic slates for my support employees, sometimes to use in coaching sessions on dealing with difficult customers. I still think it is a simple and lighthearted approach to workplace stress, and unlike e-mail and chat, with a magic slate, there's no audit trail.