



BEST PRACTICES

A Collection of Best Practices for:

Customer Service

Includes Detailed Best Practices for:

- Account Management
- Customer Incentives & Rewards
- Incident Management
- Returns & Warranty
- Technical & Product Support



Table of Contents

Customer Service Best Practices

Customer Service Best Practices

Account Management	2
Customer Incentives & Rewards	5
Incident Management	10
Returns & Warranty	14
Technical & Product Support	18

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Account Management

Customer Service

Account Management

Customer Incentives & Rewards

Incident Management

Returns & Warranty

Technical & Product Support

The Account Management function acts as an intermediary between the customer service and sales teams, ensuring that the customer is satisfied with the products or services that they have purchased. Account managers, or account executives, stay in contact with customers throughout their lifetime with the company to provide support and, when possible, sell additional products and services (i.e., renew accounts/contracts, cross-sell related products, etc.). An account manager may be responsible for a single customer (in the case of a high profit account) or a larger group or pool of customers.

NOTE: Account Management employees may work closely with the Sales and Marketing functions.

Account Management

Customer Service Best Practices

Best Practice 1-A

Perform Periodic Account Reviews to Ensure Progress Towards Specific Goals

Review the value/results the organization has delivered to customers over the course of each quarter, half year and year to accurately measure progress towards joint goals between the organization and its customers. Ensure that all account managers keep in regular touch with the key people (i.e., C-suite executives, departmental managers, etc.) in the accounts managed. This not only allows the organization to “feel the pain” of their customers (i.e., identify the needs to the customer), but it also helps both the organization and the customer to produce business strategies that will align with better overall results.

Typical Practice (the Status Quo): Review the results the organization has delivered to customers after each year and contact customers immediately after the required analysis has been made. This allows the organization to communicate with customers what progress has been made while also identifying any strategic changes the customers may want to enact and/or if there's anything else the organization can help the customer with. Take this opportunity to cross-sell organizational products and services.

Benefits of this Best Practice: Periodic reviews of the value/results the organization has delivered to customers allows the Account Management Group to both measure their internal and customer-facing performance (i.e., their productivity and how well they've performed according to the business needs of the customer). Periodically touching base with customers/account holders, furthermore, allows the Account Management Group to ensure that the organization is fulfilling the needs of the customers while providing the customer the ability to receive in-depth knowledge of the organization's performance. This keeps customer satisfaction high and allows customers the chance to work with account managers to jointly align their business goals (i.e., develop business strategies that will benefit them both) for added improvements and accuracy.

 **Related KPIs:** Number of Customer Accounts per Account Manager, Email List Growth, Lifetime Customer Value, Percentage of Accounts Past Due, Total Expense: Account Management, Total Employees: Account Management

Account Management

Customer Service Best Practices

Best Practice 1-B

Develop “Buyer Personas” to Improve Customer Communications and Product Offer Relevancy

Develop “buyer personas,” or “customer profiles,” to describe, in detail, all known information (includes data relating to recent purchases, demographic information, contact information, business needs of the customer, etc.) concerning current customers. Use in-depth interviews, social network research and purchasing data to ensure clear understanding of the customer’s needs, wants, expectations, perceptions and buying processes.

Typical Practice (the Status Quo): Review the results the organization has delivered to customers after each year and contact customers immediately after the required analysis has been made. This allows the organization to communicate with customers what progress has been made while also identifying any strategic changes the customers may want to enact and/or if there’s anything else the organization can help the customer with. Take this opportunity to cross-sell organizational products and services.

Benefits of this Best Practice: “Buyer personas,” or “customer profiles,” focuses account managers, sales representatives and

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