

# White Paper

Providing Unique Client Services  
and Support to the  
Software Development Organization

**Charles River Consultants**

David Zeiter

**SVP – Sales & Marketing**

1290 Avenue of the Americas

New York, NY 10104

(212) 906-1132

[www.crc.net](http://www.crc.net)

## Table of Contents

<b>Superior Lead Qualification .....</b>	<b>3</b>
<b>Accurate Software Installation &amp; Set-Up.....</b>	<b>4</b>
<b>Ensuring Client Satisfaction .....</b>	<b>5</b>
<b>Selling More the Easy Way .....</b>	<b>6</b>
<b>AND Of Course... Technical Support .....</b>	<b>7</b>
<b>The Net Result .....</b>	<b>8</b>

## Client Services & Support Specialists

The objective of this document is to make Executives with Financial, Marketing and Customer Support responsibilities aware of cost effective, people intensive alternatives that will improve their Company's Client Service Level and increase Revenue.

***“Millions of dollars are lost each year due to Software Company Executives NOT utilizing ‘Proactive Service Level Enhancement’ techniques...”***

Charles River Consultants offers a unique service to augment the support and contact management services of its software development clients. This service is a combination of Technical Support, Customer Service, Marketing Services and Sales Assistance. Our team of specially trained call center associates is dedicated to exceeding our client's requirements. We call this person a Client Services & Support Specialist.

Consider the following scenarios. See how many of them reflect, “What Your Organization is Doing” Vs. “What You Want It To Be Doing”.

### Superior Lead Qualification

**Most Small to Mid-Size Software Development companies suffer from the inability to provide adequate sales and marketing lead qualification support on a technical product being sold to a technical audience. It usually begins with some variation of the following situation. See if any of this fits...**

#### **Is This Your Company...**

*The Marketing Group invests thousands (if not millions) of dollars in creating demand and awareness for the company's products. The responses are most often unqualified i.e., nothing more than “bingo leads” from an Advertisement, “business card leads” collected at a Trade Show, or “web response leads” from the Company Web Site.*

*These leads are usually entered into a spreadsheet or internal database. The “Hot” ones are mailed collateral datasheets or other information requesting the recipient to state his/her interest level. Most of the time the qualification process stops here! What a shame...*

## What It Could Be...

*What if the Prospect was called by a technically competent Client Services & Support Specialist who qualified the purchase interest? What if the Prospect wanted assistance viewing Live Trial software? What if the Prospect wanted to schedule a salesperson to visit and demonstrate the software? What if a “highly interested” Prospect was immediately transferred to your sales staff? This “What If...” list can go on and on! The cost is low and the ROI is fast.*

*Further, we perform specific Web Research projects for our clients. Our Client Services & Support Associates can invest many hours searching and collecting information from the Internet in support of your Marketing and Sales initiatives. The costs for these services are much less than you’d expect and significantly less than if you perform them in-house.*

*We develop and deliver eMail campaigns to your clients and prospects. Telephone follow-up by the Client Services & Support Specialist is an integral part of the qualification process. Only “Qualified Leads” are forwarded to your Sales Staff or Resellers.*

**“Making Outbound Lead Qualification calls to prospects is a MUST DO step in a Superior Marketing Implementation Plan...”**

## Accurate Software Installation & Set-Up

**We all know how critical initial installation and configuration is. So, who is best equipped to assist your new client in installing their software and/or learning how to navigate the application? Most software company Help Desk technicians find this function mundane and boring. Consequently, service level and attitude problems often get the New Client off “on the wrong foot”. Consider the following...**

### Is This Your Company...

**“Getting started with a complete and accurate installation of software is the key to lower Help Desk and Administration costs...”**

*Marketing and Product Management develop a “How To Use” document that is supposed to help any user navigate the set-up and configuration of the software. Often the manual is cumbersome and causes frustration for the new client. The product is sometimes put on the shelf and considered a “bad purchase” due to lack of understanding about configuration and getting started issues.*

*We all know that a good start to using an application usually leads to a satisfied client. Take a moment to think of how much time and money Customer Service and Help Desk calls cost your company.*

### **What It Could Be...**

*Our Client Services & Support Specialist is trained to walk your client through the initial set-up phase and ensure proper installation and configuration. We are prepared to deal with the novice through the expert user level. The Client Services & Support Specialists primary function in this capacity is to ensure the client is getting “value” for his/her purchase dollars.*

*Only having patience and investing the amount of time necessary to ensure proper installation can do this. The simple fact is... “Before the client starts to use the product, it must be installed correctly”! Remember, a satisfied client discusses the experience with colleagues and other business contacts.*

## **Ensuring Client Satisfaction**

**Once the client begins to use the software, there is a superior method of ensuring the basis for a long-term relationship is in place. Doing 30-60-90 Day Telephone Follow-up Visits are only one key methodology to excellence in Customer Service.**

**Some people call this program “Well Visits”. We consider it “Business As Usual”. Many new users do not want to call to complain and they simply stop using the software. Proactive follow-up calls will identify the user acceptance level. The economic value of this process is easily quantified. Read On...**

### **Is This Your Company...**

*Again, many software companies view “no news as good news”! Nothing can be further from the truth. The most critical period in using new software, other than the initial set-up phase, is during the first 90-days. Most Help Desk, Customer Service and Marketing Groups are solely reactive when it comes to after-sale service.*

**“Satisfied Clients tell Three (3) others about their experience. Unhappy Clients tell Eleven (11)...”**

### **What It Could Be...**

*Our Client Services & Support Specialist will call on a scheduled basis “looking for problems”. Of course happy clients will share their experiences also. Once a problem is identified, the course of action will be clear. The most common question asked by the Our Client Services & Support Specialist is “how do we make it right?” More training, invoice and delivery issues, or a reinstall of software can all be the proper solution. Our CSS Specialist makes it happen...*

*Further extend your Client Satisfaction Levels by being totally proactive. Work with us to put together and email a client survey on your behalf. Have the Client Services & Support Specialist follow-up and call to thank the respondents... or have the CSS Specialist handle any issue before it becomes a problem.*

## Selling More the Easy Way

Again, lets visit the Marketing Group's next challenge. Clients are satisfied. The product is working properly. Now what? Selling more to a current client is usually the most profitable business a software company makes. Selling upgrades, new releases or even ensuring those software support packs and patches i.e., "fixes" are installed correctly brings incremental revenue. So now consider this:

### Is This Your Company...

*FIRST... The Marketing Group sends out an email or direct mail piece to their user base stating that the client can buy the new software at a discounted price. If the client does not call to place the order... the opportunity is often ignored.*

*SECOND... Renewing Annual Warranties and selling Extended Warranties is often left to chance or just doesn't happen. Think about it... How much does the lack of One Phone Call really cost?*

*THIRD... Engineering develops "fixes" based upon input from customer problems and further development by the coding group. The patch or support pack is usually sent to the Technical Support Help Desk. Only clients who complain of problems will receive the "fix".*

***"Well Visits and always keeping the Client's 'Best Interest' in mind pays Highly Profitable Dividends..."***

### What It Could Be...

*Selling upgrades and new releases must be a repetitive and proactive process. Consider what improved response and sales level will happen if a technically competent Client Services & Support Specialist contacts the user by phone to discuss the benefits of upgrading to a new version of the software. This is extremely profitable business, which is not to be ignored.*

*Most selling expenses were incurred in capturing the original sale. Purchase decisions are most often made quickly at the departmental level. So... Now is the time to capitalize on the opportunity to add new value to an already sold customer.*

*The Client Services & Support Specialist will review the Help Desk Trouble Ticket database to identify users who experienced problems prior to the "fix" being developed. A call will be placed to install the updated software. Remember... many clients simply stop using your software products when they don't work properly.*

## AND Of Course... Technical Support

Effective technical support can make the difference between success and failure in customer relations. Maybe it is time to reconsider extending your Company's Technical Support Services. In the world of differentiating one's products and services, software companies are often faced with making a "Good Financial Decision" that is a "Bad Marketing Decision" at the same time.

Many times money is not invested in Sales and Marketing initiatives that will produce revenue and satisfied clients because quantifying and forecasting expected results is unclear. Providing solid Help Desk technical support not only assures fault-free product installs and operation, but also gives your customer a lifeline to obtain answers via phone or email response any time of day.

***"Technical Support is much more than providing the compensatory 9:00 AM to 5:00 PM service. Using the Web and eMail extends the Service Level and improves client longevity..."***

Charles River's Client Services & Support provides specialists with a broad base of technical talent, but also the processes that will lead to your company's more profitable business model. We are experts at delivering on our Service Level Agreements and soon seamlessly become an integral part of your company's operating process. Twenty-three (23) years of delivering Help Desk solutions is at your fingertips. Read the following examples and see how we are different...

### Is This Your Company...

*FIRST – Most Help Desk Groups operate 9:00 AM to 5:00 PM, Monday through Friday. Often coast-to-coast or international clients technical or Help Desk needs are not accommodated. Some companies have their Daytime Technicians wear pagers during "Off Hours" and respond on a "Call Back" basis. This is not only expensive, but also leaves the client feeling uncomfortable during the waiting period.*

*SECOND – Providing responses to eMail Requests for Information by clients frequently gets put in a "Get To It When We Can" queue basis. Some of the easiest questions to answer are ignored. Callers into the Help Desk who received poor or no response to a technical question via eMail are often angry and upset.*

*THIRD – Using Level II and Level III Technicians to handle routine installations or inbound Level I Help Desk questions is unprofitable. And it is not only the higher salaries. Highly qualified technicians traditionally do not want to be interrupted to provide answers that other less knowledgeable personnel can handle. Thus, the client many times suffers from being treated in a manner that is uncomfortable, and your highly paid senior technical staff tends towards unhappiness that may lead to their departure from the company.*

## What It Could Be...

*Our solution is straightforward and easy to quantify. The results far outweigh the expense and the expense is far less than you'd expect to pay. We can brag about our Client Services & Support Specialists because we deliver on our promises. Basically, we do what many others don't want to do.*

*Consider the following for your proprietary and general software residing on all platforms:*

- ✍ Level I – 24x7x365 Help Desk*
- ✍ After-Hours and Weekend Phone Coverage*
- ✍ Mobile or @Home Support*
- ✍ Network Monitoring and Alert Deployment*
- ✍ eMail Response in Less Than 24-Hours*
- ✍ Internal Knowledgebase Building*
- ✍ Hardware and Software Asset Management*
- ✍ QA Software Stress Testing*
- ✍ And... Many Other Services*

*Getting Started with Charles River Consultants is a well-defined process. We meet, we discuss your needs, we propose an acceptable solution and we begin!*

## The Net Result

Charles River Consultants offers unique service and support to its Software Development clients. The deliverables are broad and yet they meet your specific needs. We have the experience, “can do attitude” and technology infrastructure to implement quickly and accurately.

Our people are our greatest asset. We deploy them with care and direction. Your needs will be met and/or exceeded per our well-defined Service Level Agreement. You can entrust your company's support and service requirements to Charles River Consultants.

***“Client-Centric  
Processes build  
lasting Relationships  
and strong Revenue  
streams...”***