



MSP Customer Success Playbook

Knowing what's **important** to each customer

MSPs' recurring revenue models rely on **happy customers that don't churn**

Every customer has a **unique experience**

This experience changes all the time...and may be influenced by **numerous triggers.**



Some of the reasons **why MSP customers leave:**

- **Unresolved** technical issue
- Too **slow** to respond
- **Rudeness** from MSP representative
- No added **value**
- Apparent **lack** of technical skills
- **Inappropriate** scope of services
- Perceived dip in **service quality**
- **Lack** of proactive engagement
- Put off by **corporate values**
- **Price** uncompetitive

95%

of MSP customers have **switched their provider when unhappy with the service.** Only 5% switched on price.

Kaseya, 2019 Research



80%

of customers consider their experience with a company to be as important as its products

Salesforce, 2019 Research



Why 'S' is at the center of MSP

Customer insights are **good** for business

Understanding customers better enables **cross-selling and upselling success**

Building a **customer-centric service reputation** attracts new customers



Keys to **increasing LTV of MSP customers**:

- **Reflect customer insights** in advance of contract renewal/business reviews
- **Target customer needs** with appropriate propositions
- Design new services based on **what customers ask for**
- **Showcase benefits** of additional services through real case examples
- **Respond quickly** to new technical requirements
- **Respond quickly** to new business challenges

**“We all need people
who’ll give feedback.
That’s how we improve.”**

Bill Gates

“Feedback is a gift.”

Warren Buffett



Tech support feedback is a good start

MSPs are increasingly **applying feedback** mechanisms to their **support tickets**

These provide valuable **snapshots**, but not **the whole picture**

There are lots more opportunities to garner and **utilize customer feedback to support MSP business goals**

Customer feedback can be used to:

- **Attract** new customers
 - **Optimize** the sales process
 - **Improve** onboarding efficiency
 - **Increase** customer success and LTV
 - **Maximize** NPS
 - **Minimize** staff churn
 - **Drive** product development, marketing and other business processes
- 

Touchpoints are manifold



➔ You **needn't** manufacture a reason for customers to **provide feedback**

➔ 'Asking for feedback' can hitch a ride on one of your many **existing customer touchpoints**

➔ Map the **customer journey** to uncover them all 

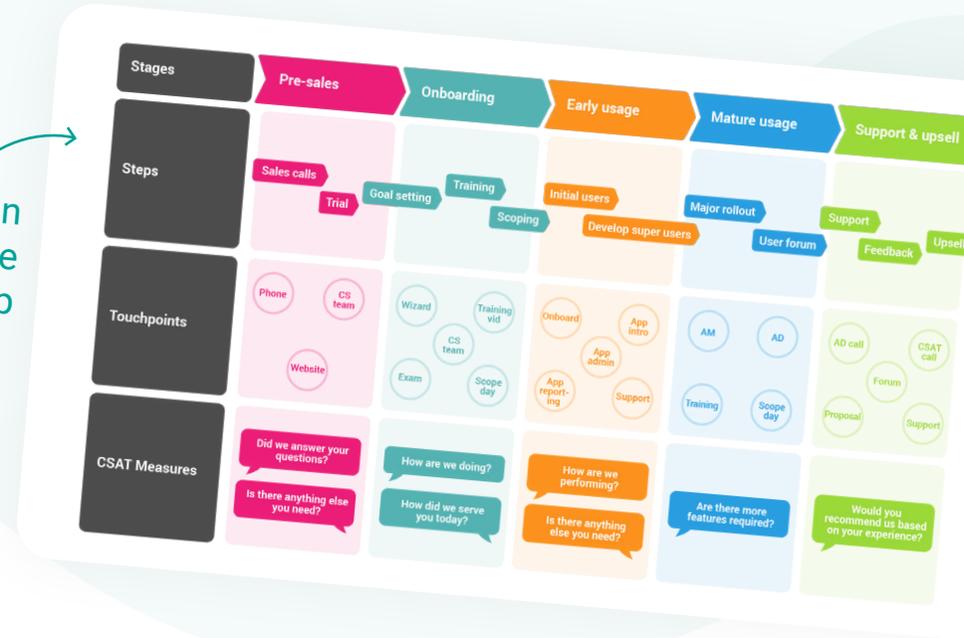
Asking for feedback...



- Is like asking a favour, so **make it a small one** (one question at a time)
- Shouldn't fatigue your customers, so **make it quick and easy to do**
- Shows you're listening, so **ensure a rapid fix/response**
- Needs questions that **fit into the context** of each touchpoint

4 steps to create your journey map

Here's an example journey map



Outline the stages of the customer journey



List all the likely **customer touchpoints** for each stage



Come up with a **sample question** you would ask the customer for each touchpoint



Plot the systems governing each touchpoint (e.g. CRM, ITSM, etc.)

A standard MSP customer journey has **4 stages**:

- Pre-sales & sales
- Onboarding
- Usage, support & service
- Renewal & growth

Pre-sales & sales

Attracting New Customers

Feedback Drives Value

Outbound

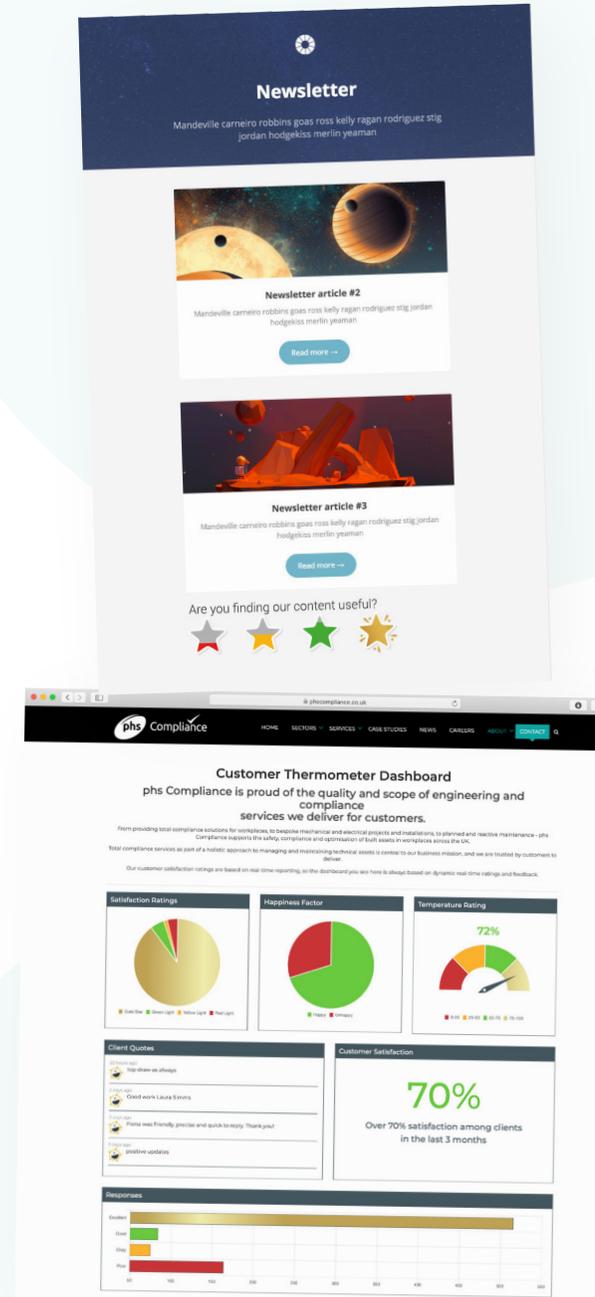
- Sales emails
- Marketing promotions
- Newsletters

Fine-tune marketing investments
Do more of **what's working**

Inbound

- Onsite widgets
- Case studies
- Reviews sites

Externalize what happy customers say
Demonstrate you listen and care about customer experience



Pre-sales & sales

Sales Process



Feedback for a More **Efficient** Sales Engine

Shorten sales cycle



- Call upon appropriate references **quickly**
- **Demonstrate** up-to-the-minute/trending satisfaction of customers just like them
- **Share** answers from customers to the questions they're asking
- **Get feedback** on proposals and how sales reps operate



Close deals

- **Highlight** your customer delight framework as a differentiator
- **Show** how you run QBRs
- **Create a welcome pack** for customers

Onboarding

Onboarding

Feedback Gets Onboarding Right 1st Time

Touchpoints

- Discovery audits
- Billing initiation
- Switchover Day
- Training



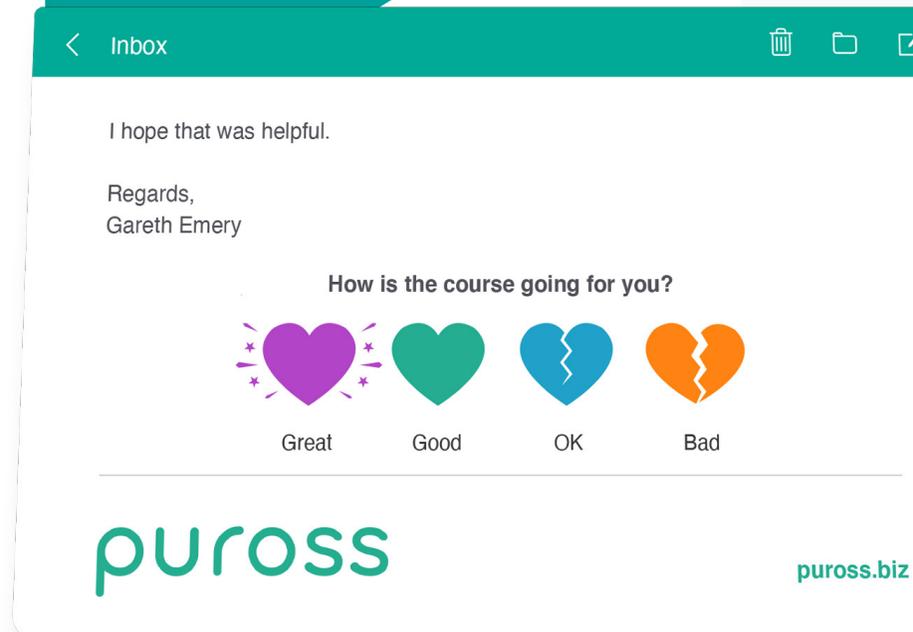
Tell customers **why feedback is important** before you start collecting

Fuel **continual improvement** of onboarding process

Are they getting what they **expected**?

Are they getting what they **need**?

What else can you do to make them **happy**?



Usage, support & service

Customer Success

Prepare to Respond to Feedback Optimally



- Work out how you'll respond to different kinds of feedback with a **feedback response planner**
- Ask **simple, non-disruptive** questions
- Make customers feel **valued** for the feedback they give
- Ensure **integrations are in place** between feedback tools and CRM, service desks, dashboards, etc.

Feedback Response Best Practice



customerthermometer.com

CustomerThermometer

- Get **senior leadership buy-in** on the value of customer feedback
- Develop a **culture of learning** from the 'voice of the customer'
- **Incentivize and reward** any employees who garners great feedback

Usage, support & service

Customer Support & Service



Maximize Responses to the Service and Experience Provided

- Support and Ticketing
- NPS
- Monthly Pulse
- Post-cancellation Surveys

Take action in real time



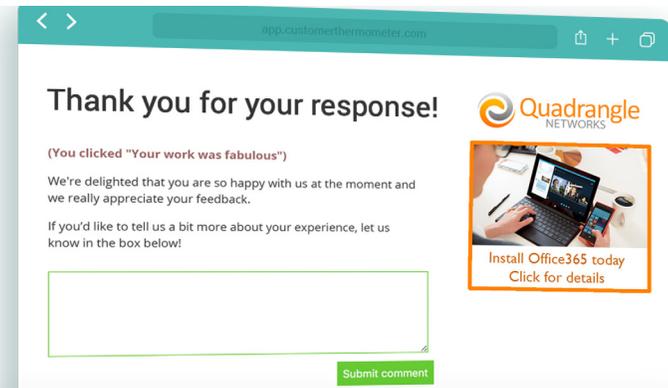
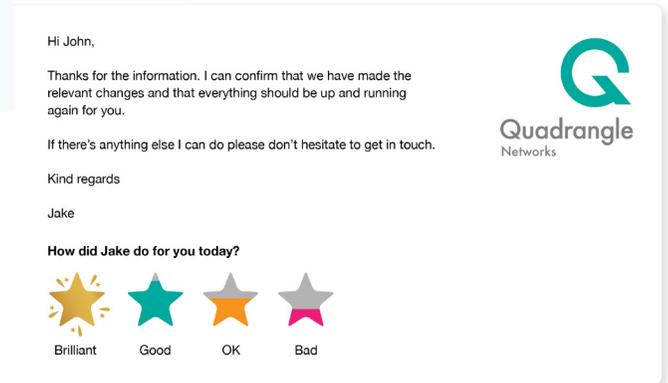
- Route **positive feedback** to 'thank you' and 'how could we improve further?'
- Route **negative feedback** to apology, factfind and remedy
- **Accelerate escalation** wherever possible

Improve performance

- People
- Process

Gather data outside of critical events, not just post-ticket

Alert flatlining customers, even when the flatline is 'good/ok'



Renewal & growth

Monthly/Quarterly QBRs

Control the Agenda for Change

Demonstrate value

- Put **standard metrics into context** with how they've said it went
- **Show how** you fixed, responded and improved
- **Have more to talk about** than the very latest issue that they will have front of mind

Be less defensive

- Good feedback should mean **no surprises**
- Get agreement that their **feedback is accurate**, and rectify if it isn't
- **Show where you mean to improve**, even if satisfaction is high
- **Spend more time** building the case for upselling-cross-selling



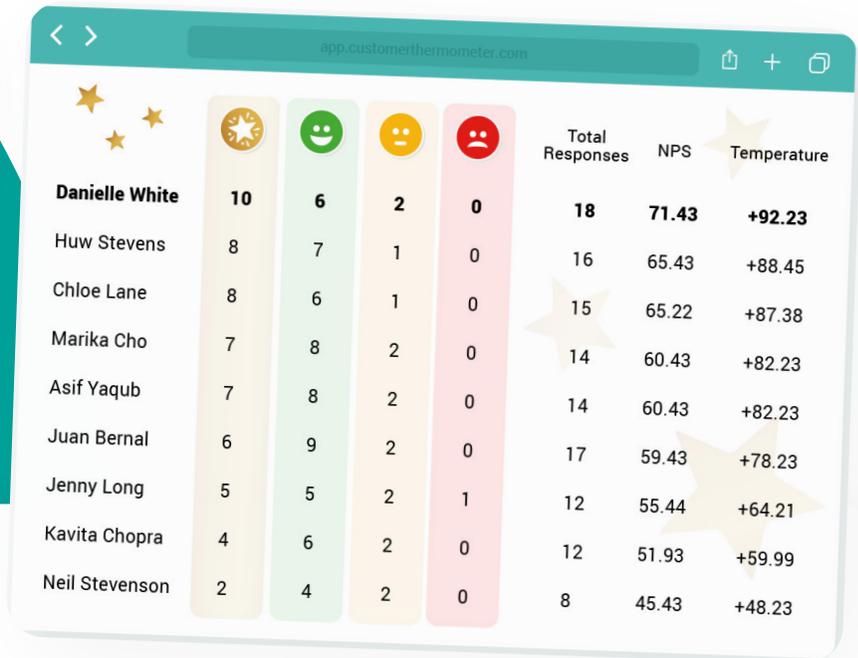
Renewal & growth

Staff Retention & Delight

Keep Happiness Going: It's a Great Motivator

Recognition and Reward

- Run **ranking leaderboards**
- Accumulate shared **staff 'treat' funds**
 - Add \$1 for Golds (yay!)
 - Remove \$5 for Reds (boo)
- Chart progress
- Build a **customer-centric culture**
- **Celebrate success**
- **Garner employee satisfaction** to reduce churn



					Total Responses	NPS	Temperature 
Danielle White	10	6	2	0	18	71.43	+92.23
Huw Stevens	8	7	1	0	16	65.43	+88.45
Chloe Lane	8	6	1	0	15	65.22	+87.38
Marika Cho	7	8	2	0	14	60.43	+82.23
Asif Yaqub	7	8	2	0	14	60.43	+82.23
Juan Bernal	6	9	2	0	17	59.43	+78.23
Jenny Long	5	5	2	1	12	55.44	+64.21
Kavita Chopra	4	6	2	0	12	51.93	+59.99
Neil Stevenson	2	4	2	0	8	45.43	+48.23

Coaching and Development

- **Apply fresh feedback** into internal training programs
- Target individual **personal development plans**
- **Apply across business**, not just support desk/call agents

Using Customer Thermometer Across the Journey Map



Operational Surveys

80%



of customers would be open to **changing MSPs right after a poor experience**

Labtech.com

- ✓ For using **straight after** an event/ service interaction
- ✓ Avoid **missing disgruntled customers** impacted by a negative event
- ✓ Benefit from the **service recovery paradox**
- ✓ Where customers are **more satisfied after a failure you fixed** than if the failure never happened
- ✓ Build into QBRs
- ✓ Benchmark and **improve**

★ ★ ★ ★ ★

Lifestyle Surveys



Evaluate the **relationship NPS**, not just the transactional NPS

- ✓ **Milestone**, rather than event driven
 - Onboarding
 - Renewal
 - Service Upgrades
 - Cancellation
- ✓ Chart changing customer perception throughout **lifecycle**
- ✓ **Remove emotional bias** for feedback scores
- ✓ **Optimize LTV**

A Simple Recipe for **Optimum** MSP CSAT

Boost Brilliant Basics

A program to make the **customer experience easier**

- Is your day-to-day interaction process **seamless** for them?
- What else can you do to **reduce friction or hassle**?
- Are you asking them to complete online forms **repeatedly**?
- Make **unnecessary** calls?
- **Repeatedly** log in?

Magnify Magic Touches

A program to get talked about and **remain memorable**

- To **add enjoyment** and a smile to their day
- This could be something as small as adding a chat system that supports Giphy, or sending **welcome packs** with candy in at the start of engagements
- Work out what makes sense for you and **your MSP brand**

Get Your Free Trial of Customer Thermometer here:

customerthermometer.com/trial

