



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 

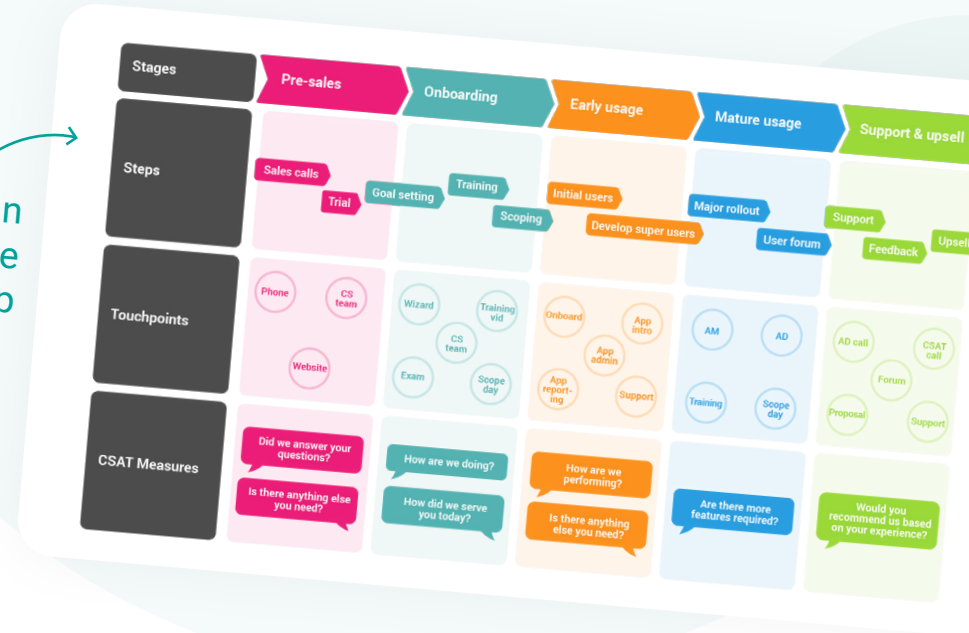
Asking for feedback...



- 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



1

Outline the stages of the customer journey

2

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

3

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

4

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

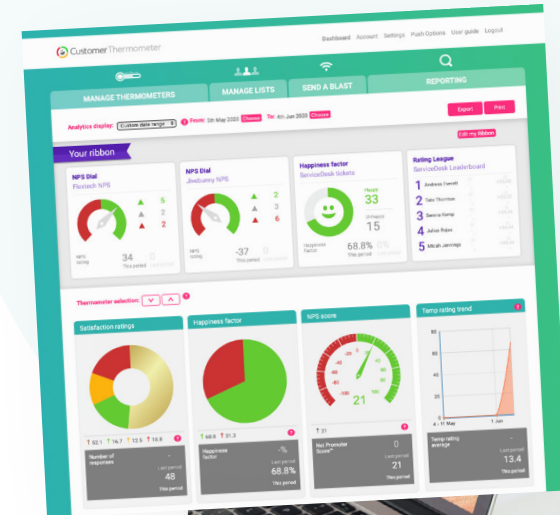
Shorten sales cycle



- 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



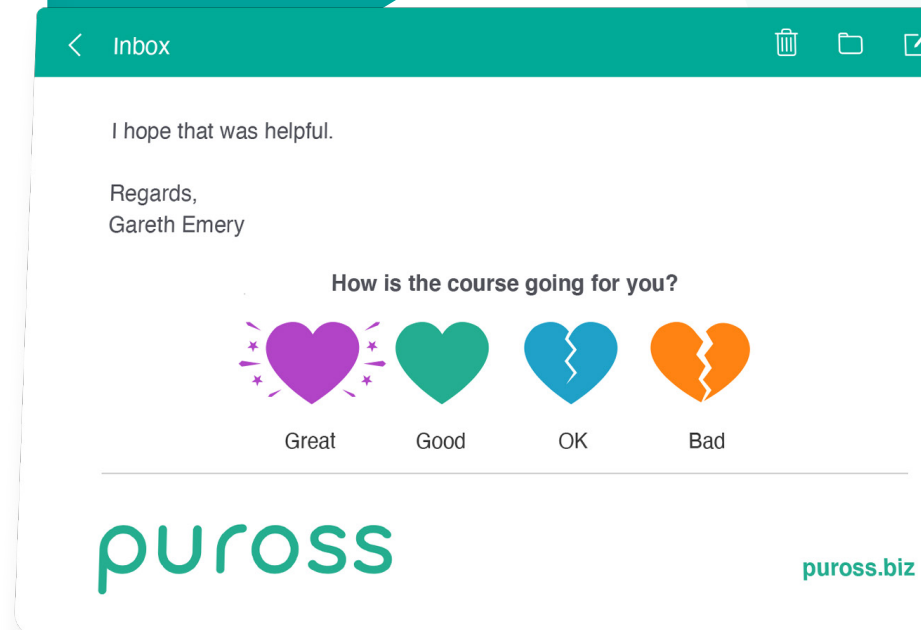
Tell customers **why feedback is important** before you start collecting

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

- 



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'

Hi John,

Thanks for the information. I can confirm that we have made the relevant changes and that everything should be up and running again for you.

If there's anything else I can do please don't hesitate to get in touch.

Kind regards

Jake

How did Jake do for you today?



Brilliant



Good



OK



Bad



Thank you for your response!



(You clicked "Your work was fabulous")

We're delighted that you are so happy with us at the moment and we really appreciate your feedback.

If you'd like to tell us a bit more about your experience, let us know in the box below!

Submit comment



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

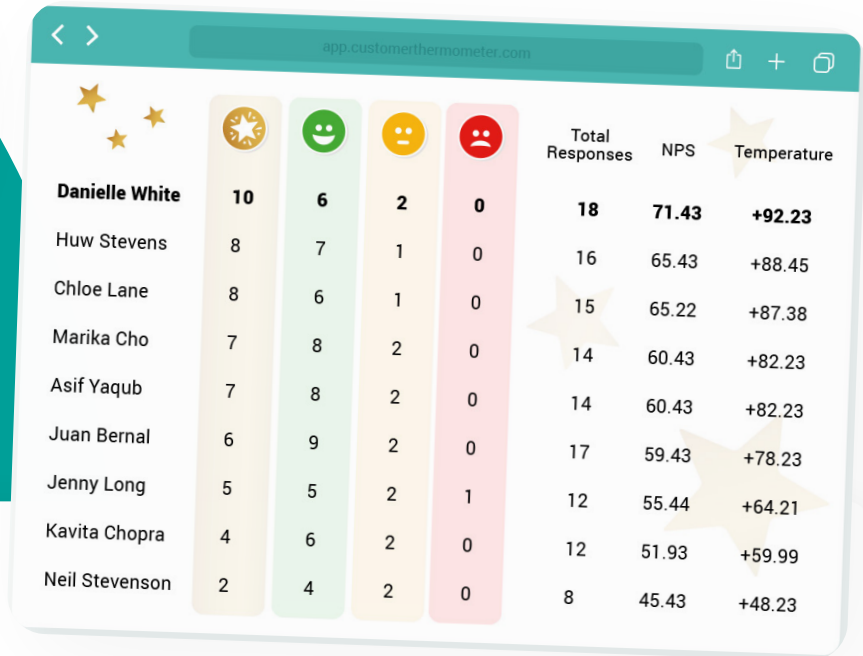
Staff Retention & Delight





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** then 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