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The Seven Components Of Meaningful Customer Care In Software Development



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“Customer” — one word that conveys the most important part of any business. Everything in the business world revolves around customers. We care about the number of customers, their loyalty to a brand and their satisfaction. Their feedback defines how the business develops and what direction it takes. It is no surprise, then, that the key performance indicators (KPIs) based on customers' feedback are the key points for businesses.

So what makes for happy customers in the outsourcing business? The answer is meaningful customer care, which is one of the components of predictive software engineering (PSE). These are the elements of meaningful customer care:

- Seamless customer onboarding process

- Customer portal
- Governance model
- Clear escalation path
- Early problems discovery
- Deep customer complaints analysis
- Customer satisfaction control

I'll cover the first four elements in this article and the last three in my next piece.

Seamless Customer Onboarding Process

One of the KPIs in many software development outsourcing companies is the growth of the number of projects (and customers). The nonstop process of searching for new opportunities results in launching several projects per month in different company departments.

With that comes the risk of launching a project the way the project manager wants. In the long run, this results in dozens of projects each running their own way, which is literal chaos. The beginning of the project is a sensitive moment that defines success, and all the critical steps should be handled the same way throughout the company. This may be achieved by implementing a seamless customer onboarding process.

It starts before the actual project when a salesperson discusses the deal with the client. The salesperson introduces the customer into the operation details and explains the project roadmap. This gives the customer a clear vision of the company approach to the request completion.

Once the customer agrees to proceed, the project processes are launched just as discussed. The project manager assigned to the project reaches out to the customer, and together, they establish the communication, reporting, escalation and other relevant processes needed to fulfill the project's requirements. They are standard for

each project, though they may vary in some aspects. In general, though, they are the same. This way, each customer receives the correct onboarding in a company and nothing will be omitted.

It is important to have a standard process from the project start. The project launch is a challenging period for a company. Often it is referred to as a trial period when a client decides if the vendor has chosen wisely. The clear customer onboarding process mitigates the risk of human errors and gives control over project execution from day one.

Customer Portal

The customer portal is, at some point, a continuation of the seamless onboarding process. This tool provides customers with the big picture of what is going on with the project at any time. The customer portal is a web-based and mobile application that gives the project overview based on the following points:

- Project name and a short description
- Project department name
- Project manager and team members names
- Link to source control
- Links to managerial tools: scrum tools, project documentation
- Project quality reports
- Escalation flow activities and description
- Contract management details
- Invoicing and payments history

The customer portal is another great tool that standardizes the process of work.

Governance Model

Every service provider should give every customer their full attention. Sometimes it is difficult to keep an eye on everyone. Applying a governance model to meetings with customers can help.

Establishing the project process during the onboarding process includes the step of setting up the reporting and communication approach. It is called a governance model. Inside it is a list of status meetings with customers that usually have the following model is defined:

- Weekly status meeting with the project manager. This is the meeting where the customer discusses managerial (not tech) aspects of the project.
- Biweekly status meetings with the project manager and the department director that is managing this project on the customer side. This is also not a tech meeting. The members discuss plans, issues, and action items related to managerial aspects of the project.
- Yearly or every six months (based on the customer decision) meetings with CTO and COO. This is a high-level meeting where members discuss general project status and long terms plans.

All the meetings described have a clear objective, structure and format. Detailed templates for each meeting and its format are used.

Clear Escalation Path

With access to the customer portal, the customer receives the escalation flow. From the very beginning of collaboration, the customer knows how to escalate any problem related to the project. This way, no concern goes unnoticed.

The governance meeting is another process where a customer can escalate problems. Every customer complaint receives a “red flag”, meaning that the solution should be provided ASAP. Using this approach, the customer can escalate the issue from a project manager to the C-Suite if it is necessary.

The escalation path follows strict rules and timelines. If the issues were not fixed on the project manager level, the escalation moves to the upper management level. With this escalation path, the customer understands the complaint and issues and that the customer understands that the feedback is guaranteed.

Combined together, the elements of the meaningful customer care principle gives the customer a clear vision of what is happening with the project. The customer understands how to reach out to a software company, how to work with them and what process they follow. It is important for a customer to feel that the business needs are filled. In fact, of all that is obvious; however, few software providers apply these rules. Sticking to these simple truths, a business may make the customer feel that they care about every request.



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Boris Kontsevoi is a founder and President of Intetecs Inc., a leading global software engineering and digital transformation company. Under his leadership, a group of software engineers developed into a truly global technology company with multiple professional certifications and industry awards, including the Global Outsourcing 100, Software 500, and Global Sourcing Association best of class company.

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