

CHRIS HARDIE

# FROM TRANSACTIONS TO PARTNERSHIPS



# ABOUT ME

- Web Development + Web Hosting Company, 16 years
- VIP Team at Automattic, 2.5 years







**GRAND  
MEETUP?**  
*Automatic*



# SUPPORT AS TRANSACTIONS



# SUPPORT AS PARTNERSHIPS







## WHY?

- Happier customers, longer relationships
- Shared sense of success brings out best in our teams
- Better honors our humanity and social nature



CULTURE

LANGUAGE



# TRANSACTIONAL CULTURE



CLOSED TICKET =  
SUCCESS



# FOCUS ON WHAT SCALES



LIMITED CONTEXT FOR  
CUSTOMER NEEDS



# INTERNAL STRATEGY VS. CUSTOMER-FACING STRATEGY



**NOT ADMITTING  
LIMITATIONS OR MISTAKES**



# CONFUSING ESCALATIONS



CUSTOMER BASHING



# TRANSACTIONAL LANGUAGE



**TICKETS AS  
“ISSUES, QUESTIONS, PROBLEMS”**



WORK AS  
TICKETS OPENED, CLOSED



**ORGANIZATIONAL GOALS  
AROUND  
TICKETS REDUCED, SOLVED**



**“I NEED YOU TO...”**



OUR PROCESS

OUR POLICY



**FAULT / BLAME**



# ROBOTIC POLITENESS

"I'll be happy to transfer you now."



**"THE CUSTOMER IS  
ALWAYS RIGHT."**



**PARTNERSHIP CULTURE**



# KICKOFF CALLS



# ORIENTATIONS



# "TOWN HALLS" AND SOCIAL EVENTS



REGULAR CHECK-INS  
OUTSIDE OF TICKETS



**TICKET METRICS ARE  
ONLY PART OF THE PICTURE**



EVERYONE IS READY TO  
BE CUSTOMER-FACING



EVERYONE IS A  
"SUPERVISOR"



**EXPECT CUSTOMERS TO  
DO SOME OF THE WORK**



**INTERNAL AND EXTERNAL DOCS  
ARE VERY SIMILAR**



EVERY TICKET IS  
AN OPPORTUNITY  
TO IMPROVE DOCS



**LIMIT CLIENT BASHING**



# PARTNERSHIP LANGUAGE



~~SOLVING THIS FOR YOU~~

LOOKING AT THIS WITH YOU



~~CLOSING A TICKET~~  
ADDRESSING THE  
CUSTOMER'S NEEDS



~~GIVING YOU AN ANSWER~~  
PROVIDING NOTES &  
RECOMMENDATIONS



~~WE'RE WORKING ON IT~~

I THINK THIS COULD BE A PROBLEM  
WITH X SO I'M TRYING OUT Y



~~DO IT BECAUSE I ASKED YOU TO~~  
LET'S HAVE A CALL  
AND TALK BIG-PICTURE



~~CUSTOMER IS ALWAYS RIGHT~~  
WE'RE PARTNERS IN FINDING A  
SUCCESSFUL OUTCOME



I DON'T KNOW, I'M  
ASKING FOR HELP.



I UNDERSTAND HOW THAT  
COULD BE FRUSTRATING.



WE MAY NOT BE A  
GOOD FIT FOR EACH OTHER.



# CAVEATS



**BOUNDARIES**



**SCALABILITY**



# YOUR SUPPORT WORKFLOWS



# CULTURE AND LANGUAGE

- Do you have partnership-building interactions outside of tickets?
- Do your customers feel like they have to game the system to get real help?
- Is your team full of collaborative, helpful people?
- Do you see your services from the customer's point of view?
- Does your language (macros, forms, docs, etc) encourage customers to think of you as partners?
- Do you measure success based on more than ticket metrics?



# THANKS!

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