Scaling Customer Solutions

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1. Objective / Problem Statement and Knowledge Base Example Structure

The company's customer solutions initiatives need to scale in response to recent rapid growth. To manage the increasing volume of enquiries and reduce pressure on the technical team, a specialized customer service team may need to be established.

This example Knowledge Base demonstrates how customer service information can be organized on a platform such as Confluence. Enquiries are categorized into three tiers, each representing a different line of inquiry, serving both as a prioritization system and as a framework for developing and advancing service agents' skills.

Customer Service Knowledge Base

General enquiries

- Call Handling & Communication Standards
- Career & Recruitment Enquiries
- Customer Identity Verification Procedures and Flow
- Feedback, Complaints & Suggestions
- Other
- Product Line Overview

Sales enquiries

- Existing Customers / Account Holders
- New Defence or Government Prospects
- Demonstration & Trial Requests
- Partnerships
- Vendor, Reseller & Distributor Issues

Technical enquiries

- Product Testing Support
- Security & Clearance Requirements
  (verification before sharing restricted product information)
- Software Bugs & Reporting Procedure
- System Integration Requests
  (API, data feeds, hardware compatibility, documentation access)
- Warranty, RMA & Replacement Process
- When Should I Contact the Technical Team?

2. Example articles

General enquiries

Purpose

To ensure customer-specific information is only released to verified, authorized individuals, safeguarding sensitive data while maintaining efficient service.

Scope

- Applies to all support staff handling enquiries that involve access to customer-specific information
- Covers Tier 1, Tier 2, and Tier 3 interactions where verification is required before releasing information

Verification Flow

Step 1: Determine Risk Level through the following flow:

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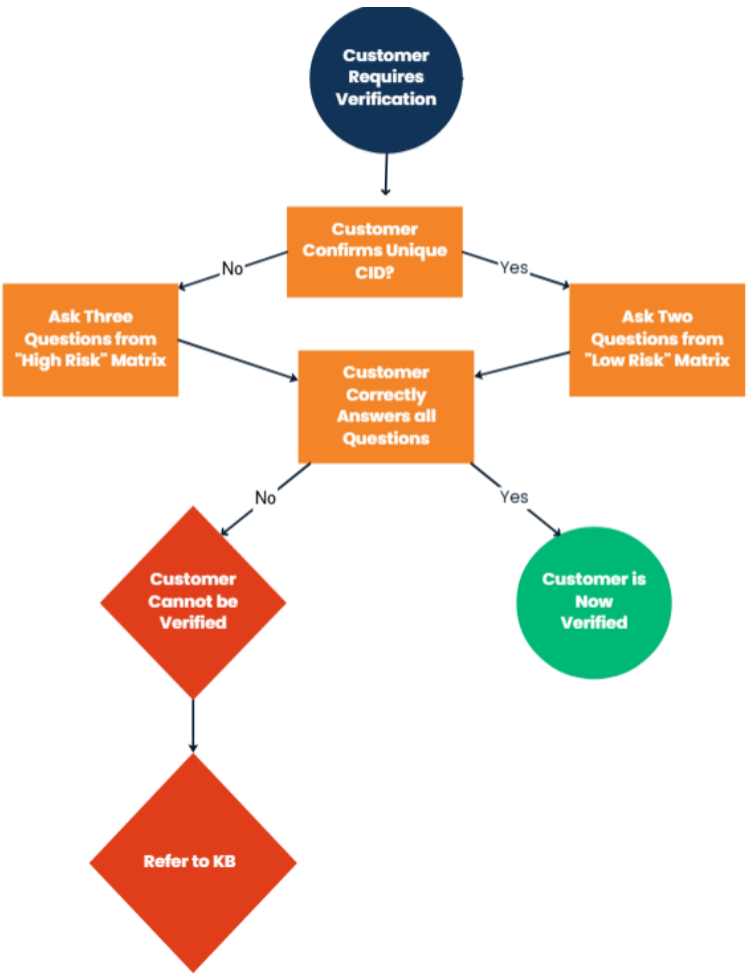

Risk Matrix Questions

High Risk	Low Risk
Please provide the delivery date of your most recent order + receipt number	**Please confirm one product from your most recent order**
Please provide the $ value of your most recent order in (AUD/USD) + last 6 digits of most recent payment method	**Please confirm the last 6 digits of your most recent payment method**
Please provide the initial date at which the company you represent first engaged with us	**Please confirm how many orders your company has made**

Step 3: Failed Verification

If the customer cannot provide sufficient information to fully verify their identity:

1. Request a signed and stamped letter of verification from the company they represent
2. The letter should include:
    - Name and title of the representative
    - Company name and official letterhead
    - Authorization for the representative to access information
3. Escalate the ticket to Tier 2/Tier 3 if further review is required

Sales enquiries

Vendor, Reseller & Distributor Issues

Purpose

To ensure that all vendor, reseller, or distributor enquiries are handled efficiently and routed correctly, minimizing delays and ensuring accurate communication between customer service and the sales team.

Scope

- Applies to Tier 1 and Tier 2 support staff who encounter vendor, reseller, or distributor issues
- Covers enquiries about orders, partnerships, contracts, pricing, or distribution

Procedure

Step 1: Confirm Customer Information

Before escalating:

1. Verify the requester's identity using standard verification procedures
2. Collect essential details:
    - Company name
    - Contact person
    - Contact information
    - Nature of enquiry
    - Urgency or time sensitivity
3. Document all information in the ticket system

Step 2: Determine Escalation Necessity

- Escalate **only** if the enquiry requires action from the sales team.
- Examples of cases to escalate:
    - Contract or pricing clarification
    - Distribution agreements
    - Vendor complaints affecting operations

Step 3: Escalation Process

1. Update Ticket Category: Change the case/enquiry category to **"Sales Team"**

2. Notify Sales Team: Send an email detailing:
    - Customer details
    - Nature of the enquiry
    - Any supporting documentation or ticket notes
    - Urgency/priority level
      CC the team lead or manager as required
3. Notify Your Manager: Reach out to your direct manager to ensure the request is prioritized
4. Document: Record all actions in the ticket system to maintain a clear history

Step 4: Follow-Up

- Monitor ticket progress to ensure a timely response
- Notify the customer once the sales team is handling the request or if additional information is needed
- Update ticket status according to internal KB guidelines (e.g., “Escalated to Sales Team”)

Technical enquiries

Technical Enquiries: Software Bugs & Reporting Procedure

Purpose

To provide a clear, structured process for identifying, documenting, and escalating software bugs, ensuring timely resolution while maintaining accurate records.

Scope

- Applies to all customer support staff (Tier 1, 2, 3) handling technical enquiries related to software
- Covers software bugs, system errors, unexpected behavior, and reproducible issues

Bug Reporting Procedure

Step 1: Initial Assessment (Tier 1)

1. **Collect Customer Information**
   - Verify identity (per general verification SOP)
   - Gather context: software version, operating system, and any recent updates
2. **Document Issue Details**
   - Ask the customer to describe the problem clearly
   - Request screenshots, error messages, or log files if available
3. **Attempt Basic Troubleshooting**
   - Follow standard KB procedures or troubleshooting scripts for common issues
   - Record all actions taken in the ticket

Step 2: Categorize & Prioritize

Use the **Severity & Impact Matrix** to categorize the bug

Severity	Description	Priority	Action
Critical	System crash, data breach, customer detected vulnerability	Highest	Escalate immediately to Tier 3/engineering team
Major	Breakdown of a particular feature, unexplained false detections	Medium	Escalate to Tier 3/engineering team
Minor	UI errors, cosmetic issues	Low	Document on feedback form, basic troubleshooting

Step 3: Escalation (Tier 2 / Tier 3)

1. Escalate the ticket with all gathered information:
    - Customer details
    - Software environment (version, OS)
    - Steps to reproduce the bug
    - Screenshots/logs
    - Severity rating
2. **Notify Relevant Teams**
    - Engineering/Development team for critical and major issues
    - Include CC to team lead or manager if necessary

Step 4: Resolution & Follow-Up (Usually engineering team)

1. Track the bug through the internal bug tracking system
2. Communicate updates to the customer as progress is made
3. Once resolved, confirm the solution with the customer
4. Document resolution steps in the ticket for future reference

3. Results

The Customer Service Knowledge Base delivers a scalable, efficient, and secure support framework.

- **Faster, consistent service:** Standardized procedures and scripts reduce response times and ensure professional, accurate communication.
- **Risk-managed information sharing:** Verification flows safeguard sensitive customer data while minimizing errors.
- **Clear escalation & development paths:** Tiered enquiry structure clarifies responsibilities, enables skill progression, and supports staff growth.
- **Scalable operations:** The modular KB framework allows rapid onboarding of new staff and easy integration of new procedures, ensuring the support team can grow alongside the business.

Impact: Reduced pressure on technical teams, enhanced customer satisfaction, and a future-ready support structure aligned with rapid organizational growth.

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4. Challenges / Learnings

- **No direct data access:** Without access to the company's historical customer enquiry data, the Knowledge Base and tier structure are inherently hypothetical. However, leveraging prior organizational experience and established best practices allows the creation of practical and credible SOPs, templates, and workflows in Section 2.

- **Handling sensitive information:** The company's products, client pool, and operational data are highly sensitive. Designing procedures required careful consideration of verification steps, escalation points, and secure information handling to mitigate risk while maintaining service efficiency.

- **Balancing detail with usability:** Ensuring the Knowledge Base is comprehensive enough for junior staff while remaining concise and efficient for experienced agents presented a challenge. The tiered structure, checklists, and visual flows were key solutions and would feature heavily in additional articles.

5. Conclusion

The proposed Knowledge Base and Tiered Support Structure provide a clear, scalable foundation for efficient customer enquiry handling, reduced risk, and a consistent customer experience. By introducing verification standards, structured escalation pathways, and SOP-driven workflows, the company can improve response accuracy, shorten resolution times, and increase team confidence across all enquiry types. While enquiry types are only hypothetical, and example articles have been limited to 1 per tier, this project more than demonstrates my ability to think strategically for team scaling.

6. References

Verification flow chart built in workcanvas.com

https://app.workcanvas.com/