Customer Support Guide

Internal Guide for Support Representatives

Support Philosophy

Our Commitment

We provide exceptional support that helps customers succeed with CRM Pro. Every interaction should leave customers feeling heard, helped, and confident in our platform.

Response Standards

- **Starter Plan**: Respond within 48 hours via email
- **Professional Plan**: Respond within 24 hours via phone or email
- **Enterprise Plan**: Respond within 4 hours with dedicated support
- **Live Chat**: Available 9 AM - 6 PM EST for all plans

Common Issues and Solutions

Account Access Problems

Password Reset Issues

- Verify email address spelling and domain
- Check spam/junk folders for reset emails
- Clear browser cache and cookies
- Try incognito/private browsing mode
- If persistent, manually reset from admin panel and call customer

Login Problems

- Confirm account is active (check billing status)
- Verify if recent password change occurred
- Check for multiple accounts with similar email addresses
- Test with different browsers/devices
- Escalate to technical team if system-wide issue suspected

Data Import/Export Issues

CSV Import Failures

- Verify file format (UTF-8 encoding, comma-separated)
- Check column headers match required fields exactly
- Limit file size to 5MB maximum
- Ensure no special characters in company names
- Walk customer through sample file if needed

Missing Data After Import

- Check for duplicate detection settings
- Verify mapping of custom fields
- Review import log for error messages
- Explain data validation rules that may have rejected entries

Integration Problems

Email Integration Not Syncing

- Verify OAuth permissions are granted
- Check email provider settings (2FA, app passwords)
- Test with simple email send/receive
- Re-authenticate connection if necessary
- Escalate to integrations team for complex issues

Calendar Integration Issues

- Confirm calendar permissions in third-party app
- Test timezone settings match user location
- Verify calendar sharing settings
- Re-connect integration with fresh permissions

Performance and Technical Issues

Slow Loading Times

- Ask about internet connection speed and stability
- Suggest clearing browser cache and cookies
- Test with different browsers
- Check if issue is specific to certain features
- Report patterns to technical team for investigation

Mobile App Problems

- Verify app is updated to latest version
- Check device compatibility requirements
- Test with mobile data vs. WiFi
- Guide through app reinstallation if necessary
- Escalate iOS/Android specific issues to mobile team

Billing Support

Plan Changes

Upgrade Requests

- Explain benefits of higher tier plans
- Calculate prorated charges for current period
- Process upgrade immediately with billing adjustment
- Confirm new features are activated
- Send confirmation email with updated plan details

Downgrade Requests

- Understand reason for downgrade (budget, usage, features)
- Explain what features will be lost
- Offer alternatives like annual discounts or usage optimization
- Process downgrade for next billing cycle if customer insists
- Document feedback for product team

Payment Issues

Failed Payment Resolution

- Verify current payment method on file
- Check for expired credit cards or changed billing addresses
- Process manual payment if needed
- Update billing information and retry charge
- Set account reminder for future payment date

Invoice Questions

- Explain usage-based charges with specific examples
- Break down prorated charges for plan changes
- Provide detailed usage reports if requested
- Escalate billing disputes to finance team
- Send corrected invoices when errors identified

Escalation Procedures

Technical Escalations

When to Escalate

- System-wide performance issues
- Data corruption or loss
- Security concerns
- Integration failures affecting multiple customers
- Bug reports with clear reproduction steps

Escalation Process

- Document detailed problem description
- Include customer account information and affected features
- Note troubleshooting steps already attempted
- Assign priority level (Critical/High/Medium/Low)
- Follow up with customer within 2 hours of escalation

Billing Escalations

Finance Team Involvement

- Disputes over charges exceeding $500
- Request for payment terms modification

- Complex billing arrangement discussions
- Potential chargeback notifications
- Enterprise contract modifications

Management Escalations

Director Level Issues

- Customer threats to cancel due to service issues
- Complaints about support quality or response time
- Requests for refunds outside standard policy
- Legal or compliance-related inquiries
- Partnership or integration requests

Customer Communication Best Practices

Tone and Language

- Use friendly, professional language
- Avoid technical jargon unless customer demonstrates expertise
- Acknowledge frustration and apologize for inconvenience
- Focus on solutions rather than limitations
- Thank customers for their patience and business

Documentation Requirements

Every Interaction Must Include

- Customer name and account ID
- Detailed description of issue or request
- Troubleshooting steps performed
- Resolution provided or escalation made
- Follow-up requirements and timeline
- Customer satisfaction rating if available

Follow-Up Protocols

Within 24 Hours: Confirm resolution is working for customer **Within 1 Week**: Check if any additional questions or concerns **Monthly**: Review escalated cases for lessons learned **Quarterly**: Analyze support trends for product improvement recommendations

Knowledge Resources

Internal Documentation

- Product feature documentation updated weekly
- Known issues tracker with workarounds
- Integration setup guides for all supported platforms
- Billing policy reference with examples
- Escalation contact directory with on-call schedules

Customer-Facing Resources

- Help center articles (help.crmpro.com)
- Video tutorial library
- Webinar schedule and recordings
- Community forum for user discussions
- Feature request voting system

Continuous Learning

- Weekly team meetings to discuss new issues and solutions
- Monthly product updates training
- Quarterly customer service skills workshops
- Annual conference attendance for industry best practices
- Peer shadowing program for complex case handling

Success Metrics

Individual Performance

- Response time adherence to SLA standards
- Customer satisfaction scores (target: 4.5/5.0)
- First-contact resolution rate (target: 75%)
- Escalation rate (target: <15% of total cases)
- Product knowledge assessment scores

Team Performance

- Overall customer satisfaction trends
- Support ticket volume and resolution patterns
- Feature request and bug report analysis
- Customer churn correlation with support interactions
- Revenue impact of support-driven upsells and retention