



Datto CEO’s Bad Experience with Customer Service Leads to Tech Support Revamp

Datto

Best Advance in Competencies and Skill Development

September 2018



Company Background

datto

Company-at-a-Glance	Datto’s mission is to empower the world’s small- and medium-sized businesses with the best in enterprise-level technology. The company does it by equipping its unique community of managed service provider partners with the right products, tools and knowledge to allow each and every customer to succeed. It’s an approach that’s made Datto the world’s leading provider of MSP delivered IT solutions.
Headquarters	Norwalk, Connecticut, with offices worldwide.
Year Founded	2007
Employees	1,500
Global Scale (Regions that you operate in or provide services to)	Datto operates internationally and has 21 offices throughout the world, including in North America, EMEA and APAC .
Customers/Output, etc. (Key customers and services offered)	Datto’s key customers are managed service provider partners who deliver IT solutions to thousands of small- to medium-sized businesses across the globe. Datto products include data backup and disaster recovery (BDR), cloud-to-cloud (C2C) data protection services, managed networking services, professional services automation (PSA), remote monitoring and management (RMM), endpoint backup and file sync and share.
Industry	Technology

Stock Symbol	N/A
Website	www.datto.com

Budget and Timeframe

Overall budget	None
Number of (HR, Learning, Talent) employees involved with the implementation?	One
Number of Operations or Subject Matter Expert employees involved with the implementation?	10-15
Number of contractors involved with implementation	None
Timeframe to implement	August 2017-present (audit in August, pilot in September and roll-out October-present).
Start date of the program	Oct. 2, 2017

Business Conditions and Business Needs

In the summer 2017, Datto CEO Austin McChord called Datto technical support with a fake problem as a made-up customer. How the tech handled the situation did not go well and started a chain reaction that led to a complete re-examination in how Datto educates their front-line technical support staff in customer service.

As part of the first stage of scoping the problem, Dan Newman — who was running the project from design, execution and assessment — conducted an audit of customer service in front-line technical support staff. This audit included 14 sources listening to over 30 recorded phone calls, interviewing managers on customer service expectations, reviewing three years of training materials for employee onboarding and notes from advisory board meetings relating to customer service in technical support.

This audit culminated in a series of presentations to stakeholders, who commissioned a multi-pronged strategy to reimagine customer service at Datto.



Figure 1: Customer Service Audit Findings and Customer Service Program Proposal.

First-Touch

- Attendees will be able to demonstrate a welcoming and upbeat first touch over the phone.
- Attendees will be able to describe two good practices for resetting between calls.

Evidence of Need

Notes from Support Listening Sessions

Technical Support Call Handling Best Practices

Notes from conversation with Mass Massuch and Joe Hutt 8/9

*Alignment with **Be a Hero***

Support Track: Self-conceptualization

Bootcamp: Demonstrating consistent positive framing

datto

Source: Datto

Overview

The reimagined customer service program began with a redesign of technical support employee onboarding. A model was built (BLAST) that was delivered piecemeal to tech support new-hire training during their first 10 days. This model at a high level emphasized the values embodied in the customer service program.

After their onboarding and serving one week solving fundamental tickets, newly hired tech support staff were brought back to the classroom for a day-long customer service boot camp that emphasized customer service skills in the context of preparing new techs to take tickets by phone. The practical ticket-solving experience plus the fourth-week-on-the-job reflection allowed the boot camp to use foundational knowledge and apply it to customer service contexts.

Existing technical support were served by a third prong: A train-the-trainer program that took parts of the customer service boot camp and put it in the hands of talented and enthusiastic technical support staff. These “deputy trainers” were given a half-day



training program and half-day “dress rehearsal” to deliver 30- to 45-minute training sessions to multiple technical support teams.

The fourth prong of the customer service program was a customer service video series that focused on a key skill. These videos were high-quality, engaging and starred existing technical support staff. The videos were shared out through a variety of platforms to be consumed by all tech support, Datto employees and external audiences. The videos also served as teaching tools for the customer service boot camp and train-the-trainer sessions.

Figure 2: Scene from the Customer Service Video Series.



Source: Datto

Design of the Program

Based on the customer service audit, the summary of findings found that ongoing development is needed to refresh techs, remind them of empathetic themes and to ensure that the customer problem is not occluded by the technical challenge. Broadly, employee wellness, emotional intelligence and professional development not only will improve their technical skills but provide appropriate outlets for problem-solving while

the phone calls strive for excellence in service. Peers and supervisors must be engaged to provide a holistic change in customer service.

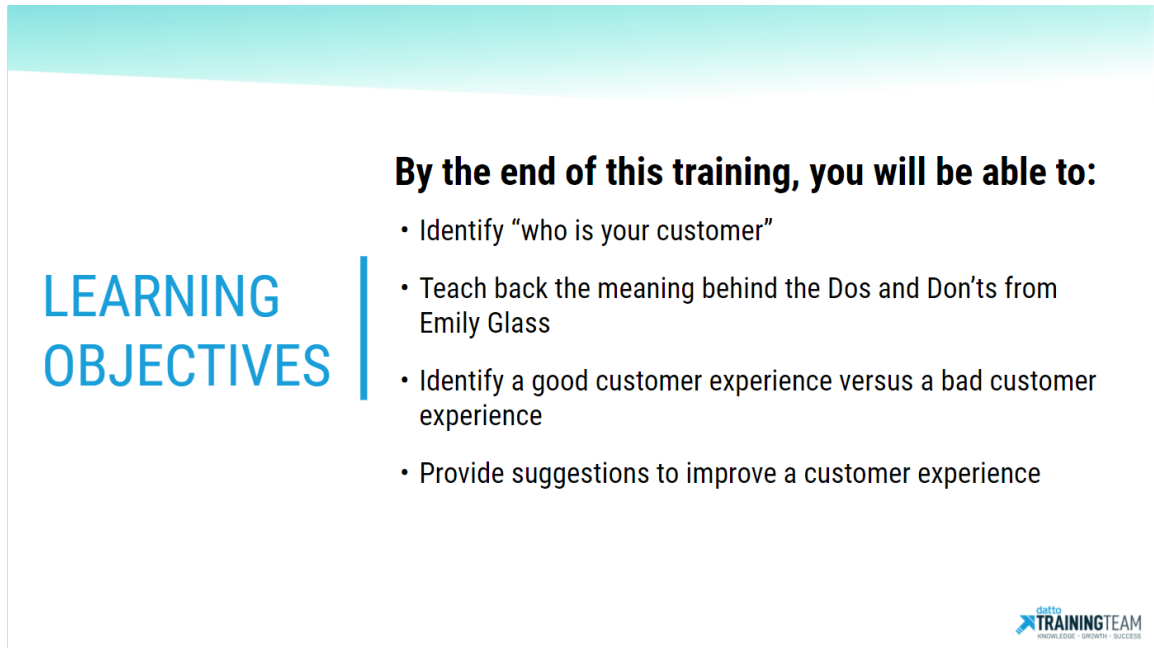
To bridge the former customer service model and the need for a more rigorous skill-building program, the previous model (BLAST) was kept while the content of the training completely rebuilt:

- **B** — Be a hero.
- **L** — Listen.
- **A** — Align and empathize.
- **S** — Set up for success.
- **T** — Teach.

Each of these items in the model was rebuilt in the various customer service program prongs:

- **Tech Support New-Hire Training** was rebuilt to discuss each element individually and encourage technicians to understand the way each stage impacted the customer experience.
- **Customer Service Boot Camp** was designed with five major sections that deliver basic call-handling skills in the context of a particular element (i.e., align and empathize focused on emotional intelligence skills). For new-hire technicians, this training was mandatory before being allowed to take customer phone calls. The boot camp took the high-level positioning from tech support new-hire training and built upon it.
- **Train-the-Trainer** sessions were focused on a single element, covering relevant skills for existing techs, adjusted by deputy trainers to deliver the most meaningful experiences for their team.
- **The Customer Service Videos Series** re-contextualized a single skill from each element in a funny situation, making the education memorable and viral.

Figure 3: BLAST Overview Session in Tech Support New-Hire Training.



LEARNING OBJECTIVES

By the end of this training, you will be able to:

- Identify “who is your customer”
- Teach back the meaning behind the Dos and Don’ts from Emily Glass
- Identify a good customer experience versus a bad customer experience
- Provide suggestions to improve a customer experience

datto TRAININGTEAM
PROFESSIONAL GROWTH SUCCESS

Source: Datto

Delivery of the Program

Tech support new-hire training was delivered in a classroom by a member of the Datto training team over seven days.

Customer service boot camp was delivered in a classroom by a member of the Datto training team over one day in a tech’s fourth week on the job.

Train-the-trainer sessions were delivered to deputy trainers (high-performing technical support staff) in a classroom by a member of the Datto training team over a half day. Deputy trainers delivered the training session to technical support teams during bi-weekly team huddles.

Customer service video series were shown during the boot camp and train-the-trainer sessions, shared out through the company Slack and shared via social media to the public.

The new-hire training and boot camp had workbooks specifically created to accompany the training. Depending on deputy trainer discretion, job aids were circulated to existing technical support staff. Discussion questions were built to supplement the customer service video series.



Figure 4: Workbook Cover and Back Cover for the Customer Service Boot Camp.



Source: Datto

Change Management Efforts

Considering that the impetus for the entire program began with a tangible customer service failing documented by the CEO, a mandate for change was very clear. Even still, taking seasoned techs and discussing customer service skills encountered resistance and a “I’m already good at this” mindset. Since Datto technical support is dealing with large numbers of support requests, pulling entire shifts off the phones for training was a non-starter. With multiple locations for technical support staff and the trainings’ intense interpersonal activities, on-site delivery needed to be duplicated for each location.

The customer service audit provided numerous exemplars of poor customer service. This initiative fortunately overlapped with an improvement in recording technician calls and recalcitrant techs were given the opportunity to hear themselves demonstrate poor customer service skills. This quelled resistance quite effectively.

The train-the-trainer program leveraged already-existing support huddles where teams of 10 to 12 technicians were already booked to be off the floor. Support huddles were lacking consistency as well, so the shift to a professional development monthly offering helped bring consistency to that process, as well as deliver important skills training by their own peers.



The customer service boot camp was delivered three times in key technical support offices (Rochester, New York, and Norwalk, Connecticut). Deputy trainers were recruited for each location and some practiced sessions that were online to support international locations.

The customer service video series became viral hits, circulating through the organization and available on-demand. Technicians who were featured recruited all their friends to watch the videos, increasing the audience pool.

Measurable Benefits

New-hire technicians who underwent all four of the initiatives universally reported high satisfaction and performed well on all knowledge checks. One hundred percent of all responses on a summative survey sent out after the customer service boot camp were “strongly agree” or “somewhat agree.”

Some of the qualitative responses on the boot camp survey (new hires and existing hires):

- If you could recommend any changes to the training material, execution, or topics, what would they be?
 - “Nothing, the training was pretty much perfect in my eyes.”
 - “The booklet we got to take with us will help a lot when trying to reference back.”
 - “I think Dan is one of the best trainers here at Datto. He did a phenomenal job on making sure the information was clear and accurate for us.”

For self-reported learning, empathy and active listening were cited the most often and as the most useful to them.

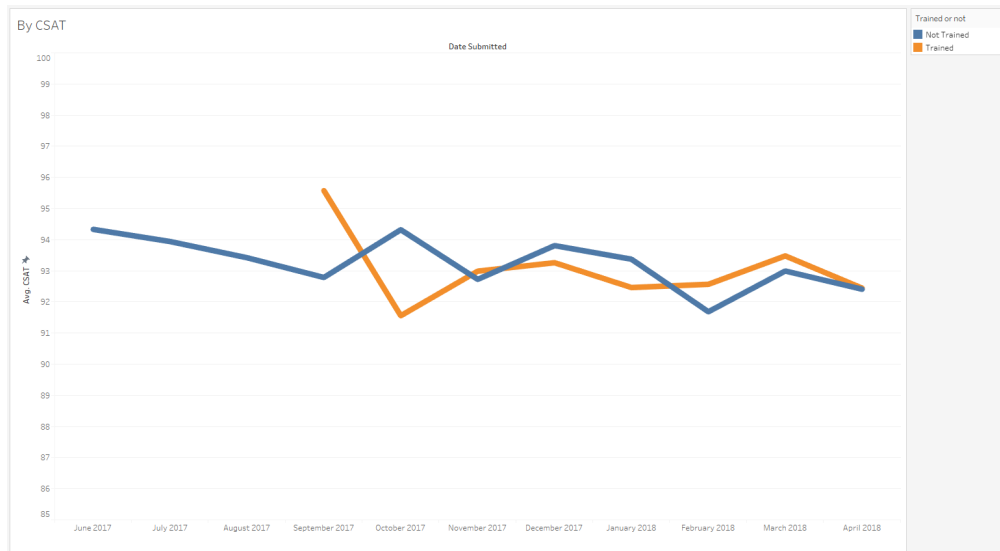
For the customer service video series, the videos were viewed over 4,500 times collectively with the most popular being the “Reset Dance” with over 2,700 views. Qualitative responses were similar: “very fun,” “super memorable,” “relatable” and “high-quality.”

For the train-the-trainer series, the deputy trainers reported that the experience was valuable for them professionally, as well as very productive for their teams. Supervisors who ran team huddles reported that the deputy trainers produced a highly engaging and meaningful dialogue, especially on emotional intelligence.



In regard to the impact on performance, new-hire performances on customer satisfaction were commensurate with existing technician performance:

Figure 5: Program Data 1.

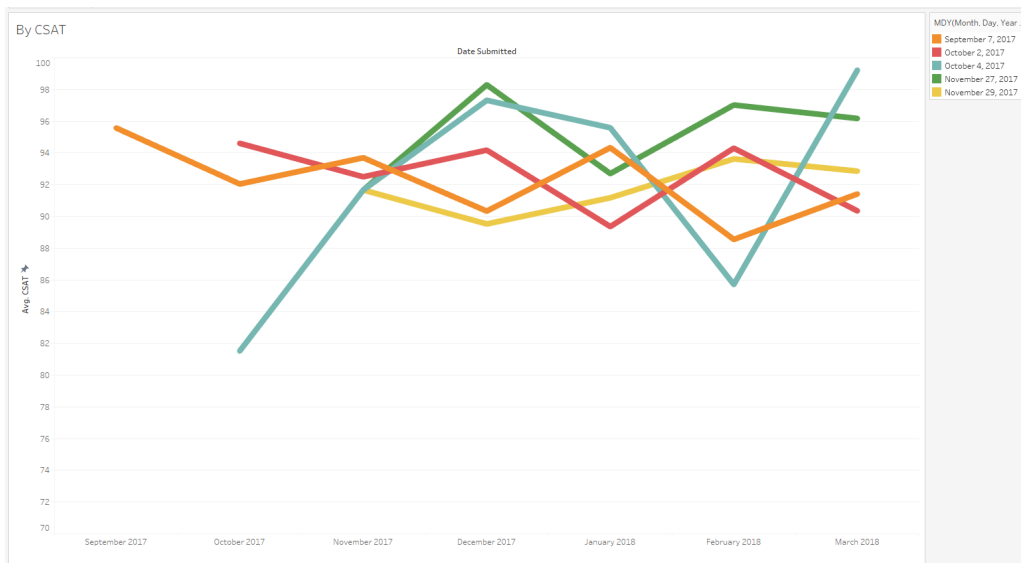


Source: Datto

In the above graph, Datto measured technicians who participated in the customer service boot camp against technicians who did not through customer satisfaction surveys. The majority of “trained” participants were new hires who in their first weeks on the job scored within a few percentage points of existing technicians.



Figure 6: Program Data 2.



Source: Datto

In this graph, Datto measured CSAT by cohort. The Oct. 4 class (pale green line) had only two new hires and the rest were existing technicians who needed remediation in the customer service skills. Their performance had the greatest change, from 81.3 to 97.4 in two months. When looking at the cohort breakdown, the previous graph’s “Trained” dip in October 2017 makes more sense: Existing TSEs with poor performance dragged down the “Trained” population to its lowest CSAT at 91.5

Technicians also were measured on their quality assurance scores, which are internal reviews by supervisors and technicians doing a rotation in quality assurance. Across the board, Datto technical support score above 97% on QA compliance every month. New hires and existing technicians performed equally as well.

Overall

Technical support new-hire training, the customer service boot camp and the train-the-trainer program still are being actively offered and iterated upon. Reception has been extremely positive from participants and technical support management and thus the support for the program still remains.

Some key lessons learned were specific to the particular training prong:

- New-hire training had to change from covering the BLAST model in a vacuum to setting up expectations for the boot camp. Each element was originally explained as a stand-alone value and participants didn't realize that it would carry through their technical support onboarding, which caused the boot camp to have to spend more time reviewing the elements and rationalizing them. The change implemented was to alley-oop the value from the new-hire training to the skill covered in the boot camp ("Today during new-hire training we are talking about **teach**. When you go through the boot camp in the next week, you'll be actually teaching customers on the phone. For now, let's discuss why **teach** is an important value ...").
- Similarly, some of the boot camp's activities that seemed ineffective in the classroom turned out to be the most memorable and long-standing skills that new tech support displayed on the floor. For example, technical support new hires were asked to discuss a list of "Do's and Don'ts" when setting customer expectations. New hires typically provided generic surface-level responses when asked to critique the do's and don'ts. During quality assurance call reviews in their first month of taking calls, however, technicians provided nuanced references to the original do's and don'ts and properly contextualized the guideline to the reality. The lesson learned was that the on-the-job environment was appropriately paired to the skill-building classroom activity and failure in the classroom did not correspond to failure on the job.
- The first customer service videos had wildly varying audience reactions. People "liked" the videos universally but some videos that were feared as too didactic during scripting turned out to be appreciated more by the target audiences, whereas videos that leveraged more fun didn't seem as memorable to target audiences. After numerous conversations with sample audiences, the design phase for videos involved more touchpoints with certain individuals who understood the preferences for technical support staff. These individuals were not typical technical support staff; they analyzed the potential videos exceedingly well for the target audience. The lesson learned is that finding the right reviewers increased the effectiveness for the video content.



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