



ZERO-HASSLE SERVICE: MASTERING CUSTOMER SUPPORT IN THE WORLD OF WHITE-LABEL SOFTWARE

PRESENTED BY:

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ROAD MAP

Customer Support Challenges and Pitfalls

Tips and Best Practices for White-label Software Support





WHEN IT COMES TO MANAGING A WHITE-LABEL SOFTWARE BUSINESS, CLOSING A CUSTOMER IS ONLY ONE PART OF BUILDING A SUCCESSFUL COMPANY. IT'S MORE IMPORTANT THAT YOU KEEP CUSTOMERS FOR YEARS.

-JOE BRANNON, CEO AND FOUNDER



CUSTOMER SUPPORT CHALLENGES & PITFALLS

PITFALL #1 | A COMPLEX USER EXPERIENCE

Software needs to be intuitive for the end-user. If your clients struggle to use the software, they'll either bombard you with customer service tickets or quickly find another solution.

PITFALL #2 | INADEQUATE ONBOARDING

All too often, companies invest in software but need help understanding the full features and functionality. Effective training for customers means you'll field fewer calls and emails for support.

TIPS & BEST PRACTICES FOR WHITE-LABEL SOFTWARE SUPPORT

- ✓ Set proper expectations during the sales process.
- ✓ Lay the groundwork for success during training and onboarding.
- ✓ Follow up shortly after onboarding to offer additional tips and training.
- ✓ Regularly offer best practices and communicate important information about the software.

QUESTIONS TO EVALUATE USER EXPERIENCE

Evaluating the user experience (UX) of any tool is crucial. Here are some questions to ask when you're evaluating a white-label platform:

- Are there clear instructions or guides to help new users get started?
- Is the navigation menu or dashboard layout intuitive? Can users easily find the features they need?
- Are all features easy to understand and use? Do they work consistently without glitches?
- How does the platform handle errors or issues? Is there clear messaging?
- Have you gathered feedback from current users of the platform? What issues have users identified?

ONBOARDING MILESTONES TO OPTIMIZE UX

1 | DURING THE SALES PROCESS

Milestone: Engage with potential clients and showcase the platform's ease of use.

Reminder: Emphasize the intuitive nature of the platform and offer insights to reduce the learning curve. Provide clear information about available customer support resources.

2 | DURING ONBOARDING / TRAINING

Milestone: Begin the onboarding process and ensure customers grasp the platform's functionalities.

Reminder: Dedicate time to guide customers through the platform, focusing on key features. Collaborate with them to set up their first campaign, ensuring they're confident in their initial steps.

ONBOARDING MILESTONES TO OPTIMIZE UX

3 | TWO WEEKS AFTER ONBOARDING

Milestone: Conduct a follow-up to gauge the customer's comfort level and address any post-onboarding questions.

Reminder: Reconnect with the customer to provide additional guidance, offer advanced training if needed, and gather feedback on their initial experiences.

4 | ONGOING ENGAGEMENT

Milestone: Maintain consistent communication and support to ensure customer success and satisfaction.

Reminder: Regularly share best practices, software updates, and other valuable insights. Consider sending a monthly email newsletter to all customers, highlighting tips, tricks, and important information.

AN INSIDE LOOK AT TEXTLIVING'S CUSTOMER SUPPORT

We've refined our customer support best practices into a 10-page document that our white-label partners can share with customers. In it, we address the following topics:

- **Platform Navigation and Basic Functions**
- **Feature Deep Dive**
- **Technical Troubleshooting**
- **Best Practices for Optimizing Efficiency**
- **Campaign Tips and Ideas**
- **Talking Points to Increase Software Usage**

Because of the processes we've created, we manage thousands of users with only two customer support team members – who receive fewer than five customer support calls per day.

MORE RESOURCES TO EXPLORE

- [ProTalks Episode 3: What it Really Takes to Run a White-Label Software Business](#)
- [Article: Common Pitfalls to Avoid When Selling White-Label Software](#)
- [Explore our entire library of resources.](#)



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