



Syntellis leverages Ideba's White Glove Service Training to dramatically improve CSAT and NPS scores

When Joe Muehlhauser assumed his position as Vice President, Client Support at Syntellis over 3 years ago, he began where any good manager would—with a review of existing strengths and areas in need of improvement.

"As I came into the company," Muehlhauser recalls, "I was evaluating the state of things within the support organization and I quickly realized that it was not as mature as it could be in terms of the basics, whether operational queue set up or just foundational soft skills training."

Syntellis had a longstanding relationship with Ideba, who had been hired to conduct CSAT research to gauge customer sentiment toward the service organization. That research showed satisfaction trending in the wrong direction. On learning about Ideba's White Glove Service Training, Muehlhauser spoke with Ideba to understand more about the offering and how it could meet the needs he'd identified. "As a staff, we needed to have a common language," Muehlhauser states. "We needed to be clear on things we're required to do when it comes to service."

Better internal communications to benefit the customer

Muehlhauser was not just thinking of optimizing customer relationships and communication. He realized that internal communication could be just as significant in providing excellent customer service. "It's also about communicating better internally for the benefit of the

Over the five quarters following the first wave of White Glove Service Training, **CSAT scores for Syntellis support rose from 6.8 to 7.6**. After the second wave of training, those **scores rose to 8.3**.

Over the same period covering two waves of training, the company's overall **CSAT rose from 7.1 to 8.0** and the number of support cases requiring escalation fell by more than half.

customer,” he observes. This meant coordination with and input from the Syntellis executive team and internal constituents as well as reliance on customer feedback.

At the beginning of the process, “Ideba offered to engage with whomever we wanted them to,” Muehlhauser says. Based on internal interviews, direct customer feedback and CSAT information, Muehlhauser partnered with Ideba to develop a curriculum. “I can’t say enough about how easy Ideba made that process,” he says. Both Muehlhauser and Syntellis leadership thought it was important to weave into the training specific SLAs and best practices that had been identified internally, but not yet broadly socialized. Ideba was charged with doing so.

“Especially given the bespoke nature of that content,” Muehlhauser continues, “I was pretty blown away at how little work me and my team had to do. They made it very easy in terms of gathering information and interviewing us.”

Leveraging existing CSAT work further simplified the training setup process. “I was extremely impressed with the first iteration of the deck that Ideba brought back,” says Muehlhauser, “They had so much information about our company already and they leveraged that and brought in all that content, along with the internal material we deemed important.”

Planning for success

There was little room for failure with White Glove Service Training. Due to the service issues facing Syntellis, the training had become a talking point for assuring customers that the company was investing in improvements that would soon transform their experience. While White Glove Service Training was not the only tool Syntellis tapped to meet their customer experience goals, it was central to their efforts.

To help ensure long-term success, Syntellis opted for two waves of trainings. The first focused on their

support organization and their highest value software. The second, approximately one year later, targeted the support organization more generally and was open to all. “The executive team and I thought it was important that every customer-facing employee get the basics from the training.”

Training with obvious value

When asked about post-training feedback from participants, Muehlhauser notes that participants found the trainings engaging and interactive. Positive feedback flowed almost immediately. “We have a long-time employee who is a bit change averse, with a very strong personality. She was one of those people I was concerned would be rolling her eyes at a training that didn’t prove its worth. I still remember that at the first training she said, ‘You know, this is really powerful because I do tend to forget that there is a person on the end of these cases who’s in a bad spot. They really need help. And this has helped remind me of that.’”

With its train-the-trainer methodology, White Glove Service Training offered the opportunity to scale the training’s benefits as far and wide as the organization chose. In addition, Syntellis appreciated that they would own the training materials Ideba had developed for them. “I have been in scenarios before,” Muehlhauser explains, “when we didn’t own that material and it was a total hassle not to be able to use a slide in another presentation or extend the training’s value. The fact that we would own those materials was a huge plus and helpful selling the training to my leadership.”

“I would definitely recommend Ideba’s White Glove Service Training,” Muehlhauser concludes, “due to ease of working with them to build and deliver the training, the fact that it’s customized to your needs, and the fact you own the materials. They do a really good job of keeping feedback factual and trying to problem-solve, and not making people embarrassed for exposing your warts. And you see the results in the numbers.”