



Defining the Optimal Service Model for SMBs

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Today's presenters



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New report: Do What With Me?

We're trying to understand and define the optimal service models for SMBs.

New research was fielded asking:

- How do small businesses prefer to receive customer service?
- What constitutes table stakes in delivering a DIWM service?
- What are the reasons for preferring one service model over another?
- Which tools are customers more inclined to prefer to DIY vs DIWM vs DIFM?

Objectives for this webinar

We'd like to dig in to the key findings:

- What “as a service” really means to your SMB customers and how service can be a major value driver for your company.
- The gaps that exist between the customer service that SMBs want and they actual get.
- How collaborative service leads to a deeper SMB understanding of a product’s value.
- What form the optimal service model should take for small businesses



Software-as-a-Service?

Many providers have found the right mix of digital products to offer their small business clients. But what about service?

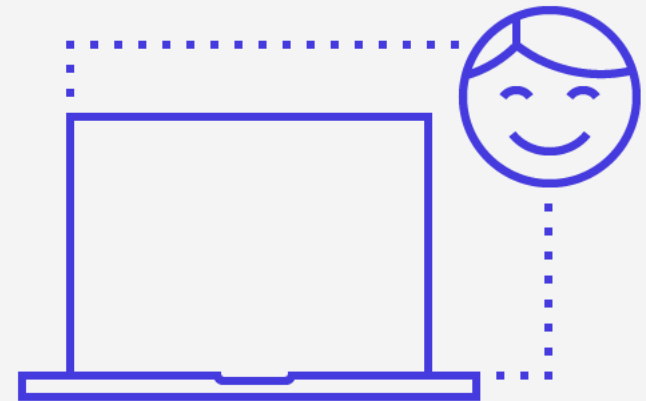
Which products requires service? How much service?
And most importantly, what kind of service do SMBs prefer?

Service as a differentiator?

As digital products are increasingly becoming commoditized, service is key.

SERVICE CONSIST OF MANY THINGS:

- General service
- Local language
- Cultural context
- Brand loyalty/Trust



Three different SMB service models

DO-IT-YOURSELF (DIY)

Small business does everything themselves from purchasing (buy-it-yourself), onboarding, building and/or managing their digital solution.

DO-IT-WITH-ME (DIWM)

This is a collaborative approach where small businesses handle some tasks themselves, but can get assistance or guidance for more complex or time-consuming tasks.

DO-IT-FOR-ME (DIFM)

This is a full service solution, where the small business focuses on the daily operations of their business and lets the solutions provider run their digital presence.



Research methodology

Our research is based on an online survey.

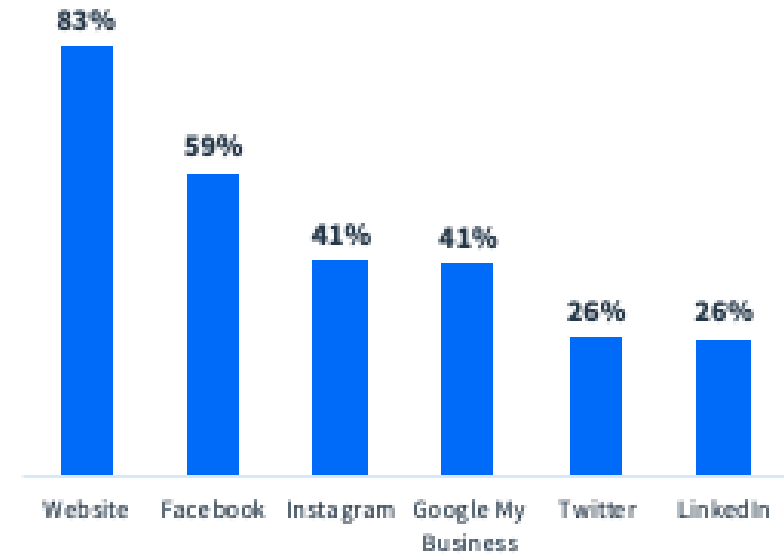
- Survey of 309 full-time employees at US small businesses (less than 500 employees)
- The survey was conducted between Oct 8 – 23
- Required to operate in vertical categories: Retail, Home services, Personal services, Automotive, Professional services, Health & medical, Dining & entertainment, Online-only/eCommerce.

A few quick survey insights

Based on the 309 survey responses

- Only 4% did not have an online presence
- 70% used apps to manage their business
- Top 3 types of online presence were:
 - Website (83%)
 - Facebook (59%)
 - Instagram/Google My Business (41%)

TYPE OF ONLINE PRESENCE



Base: 309 businesses.



SMB service satisfaction

Overall, SMBs were satisfied with service quality and responsiveness of their providers.

1/4

only approx. ¼ of small businesses were unhappy with the service that they received

66%

of SMBs prefer to have contact more than once a year.

So where are the gaps in servicing SMBs?
And more importantly, how can you as a provider to address this in your service model?

Key learnings

Key learnings in defining the service model

- 1. COVID has accelerated the need for service.**
- 2. There is a gap in service model and SMB preferences.**
- 3. Personal service still matters.**
- 4. There is untapped potential in automation.**
- 5. Business owners want more collaboration.**

**Learning 1:
COVID has accelerated
the need for service**

SMBs need to get online even faster

COVID has accelerated digital adoption across the small business landscape.

70% of small businesses made a software purchase directly related to the COVID pandemic.

Aside from tech for more efficient remote work (41%), there is a focus on ensuring transactions:

- Online payment (28%)
- Website (21%)
- E-commerce (14%)

Based on the survey of 309 employees of U.S. small businesses





**On SMBs getting started with e-commerce
during the COVID pandemic:**

**“They think they’ll do DIY. And then they realize, ‘Wow, this
is more complicated.’”**

**– Sherilyn King, Sr. Vice President of Sales, Marketing &
Customer Service**

Learning 2:

**There is a gap in service model and
SMB preferences**

Service providers meet most needs...

The service channels where providers and small business preferences were **MOST** aligned.



EMAIL

68% providers offered
vs.
69% SMB preference



ONLINE MESSENGER/ CHATBOT

5% providers offered
vs.
5% SMB preference



TOLL FREE PHONE

93% providers offered
vs.
80% SMB preference

...But there is still room for improvement

The service channels where providers and small business preferences were LEAST aligned.



ONLINE REQUEST FORM

58% providers offered
vs.
21% SMB preference



CALL BACK OPTION

6% providers offered
vs.
26% SMB preference



TEXT MESSAGE

2% providers offered
vs.
20% SMB preference

Learning 3: Personal service still matters

The optimal model for personal service

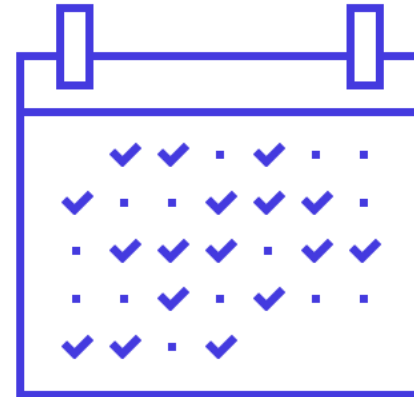
In a DIWM scenario, SMBs would like access to:

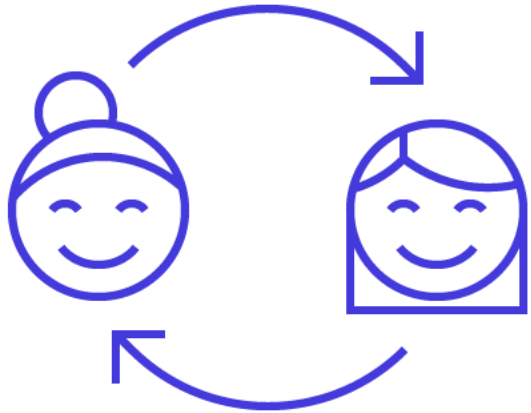
50%

on-demand access to a dedicated customer service rep

44%

of small businesses want a regular scheduled check-in with customer service rep





Still looking for a trusted advisor

There is a mismatch in the level of personal service available to SMBs.

57%

of small businesses would prefer a dedicated customer service rep

36%

only 36% of providers offer a dedicated customer service rep

Learning 4:

**There is untapped potential
in service automation**

Making the most of their investment

SMBs have an interest in making the most of their investment in digital solutions.

47%

seek assistance with the initial set up of their software

46%

seek assistance with learning a specific function of the software

36%

want a report on software performance and/or return-on-investment (ROI)

Based on the survey of 309 employees of U.S. small businesses



Automated service channels can meet their needs

There are automated service channels that can be made available for scalable use by SMBs.

Online content resource library
(with content on how to
optimize software use)

Tutorial videos with step-by-
step guidance on how to set up
features

Regularly scheduled webinars
with tips of using software with
live Q&A

E-learning course in the
foundational elements of the
software

In-tool guidance, tips and tricks
and set up wizards for new
features

Automated monthly reports to
provide an update on
performance and ROI



On providing tools that enable service:

“It's an objective of ours to... transition them to do it yourself. Or at least to do certain things by themselves. Because then we can also provide them with additional tools and services that might help him do more.”

– Joachim Helfer, Manager Director

**Learning 5:
Business owners want
more collaboration**

They especially want to collaborate on...

We asked SMBs which products they wanted digital marketing advice or guidance for:

93%

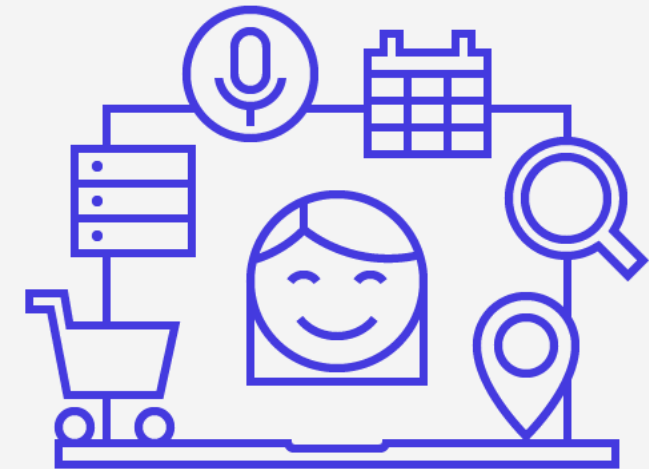
For customer relationship management (CRM) systems

82%

For their website and overall digital presence

69%

For email marketing, such as campaigns and newsletters





“DIWM is also about ensuring collaborative service. This collaboration is what leads to a deeper understanding of a product’s value. ”

– Matt Matergia, General Manager of Americas & Vice President of Sales



It's all about setting them up for success

SMBs want help in a collaborative, DIWM approach because of a few key reasons:

1. They want digital advice and guidance from professionals!
2. They want to ensure a successful digital presence for their business
3. They want to make the most out of their monetary investment
4. They need help on where to prioritize their time and efforts for maximum return-on-investment
5. They may not have the skills themselves, but they're most likely willing to learn (if they have the time)

There is a path to scalable service model.

And it's all about balancing bespoke service and automation.

**Encouraging SMB users to manage routine tasks themselves,
in order to free up time for more personal touchpoints.**

The do-it-with-me (DIWM) model

There are three key elements to offering a scalable service model:



BESPOKE SERVICE

Proactive live service, e.g. regular check-ins, can reduce the amount of reactive service needed.

Also helps SMB better understand the value of the product and/or solution.



AUTOMATION

Automated service, like chatbots, provide the ability to offer 24/7 service that helps SMBs locate the right content OR redirects them to get help from a live agent (or a callback!)



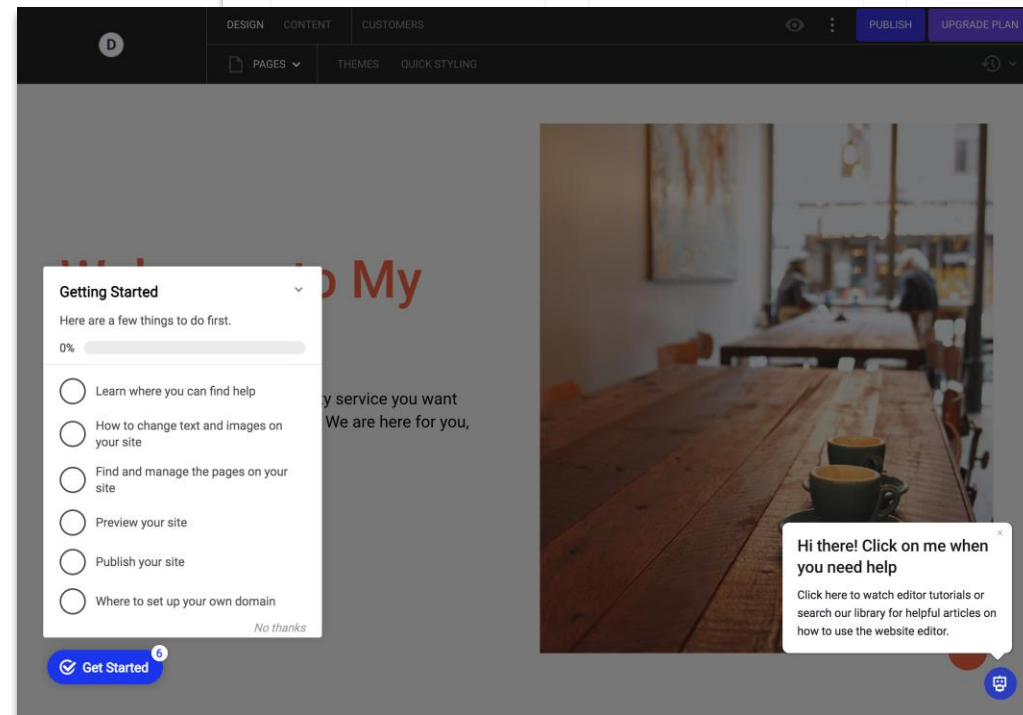
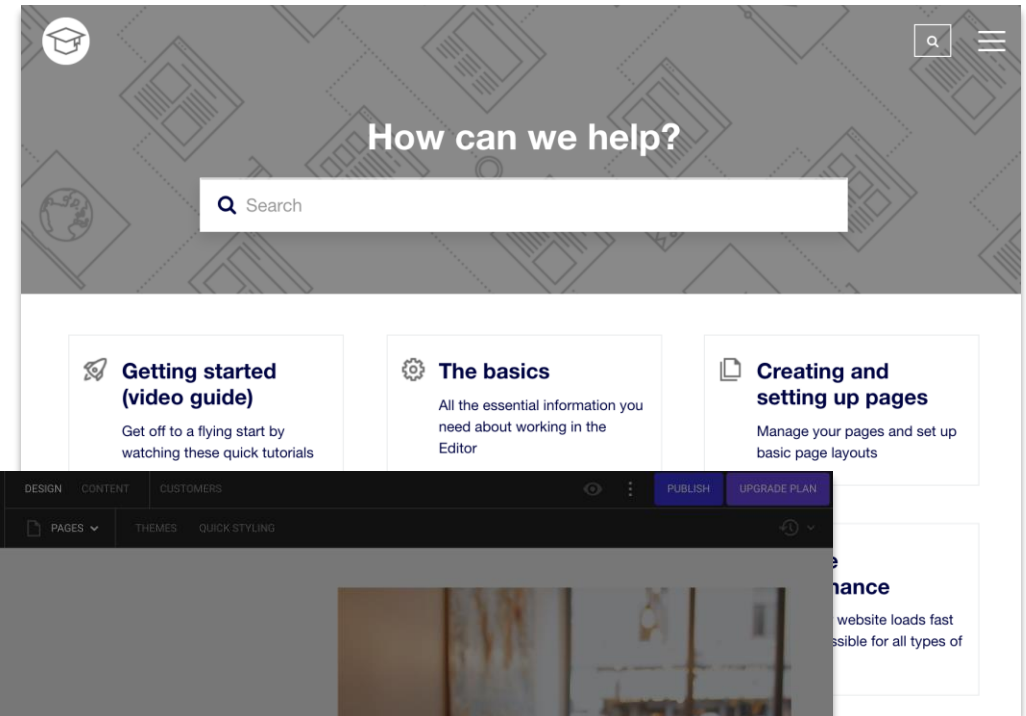
CONTENT LIBRARIES

A comprehensive content library can provide better onboarding, training, video tutorials and more, that educates AND empowers the user to make updates themselves.

Examples from Mono Solutions

We offer our reselling partners a fully non-branded academy that they can use for their small business clients.

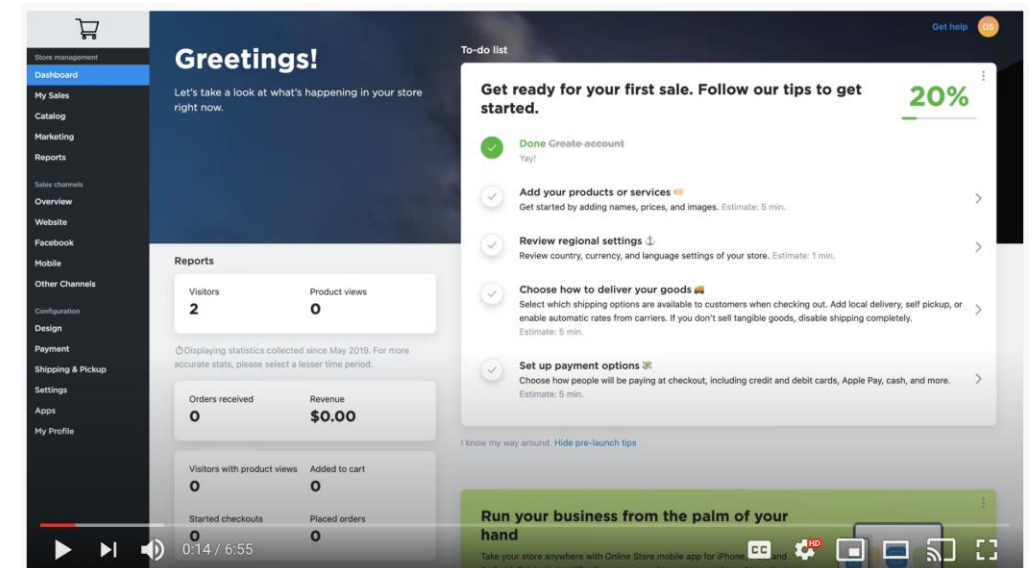
In addition, in-tool guidance helps users make the most out of their website.



An example from our friends at Ecwid

Ecwid has a great white-label content library that helps partners to get their small business clients engaged.

A great example is their white-label getting started video.



Welcome to Your Online Store

Questions?



Get in touch



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Meet Mono at Localogy 20/20
Matt Matergia will be on-stage
about Local Businesses and BIY

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