

Selecting Customer Support Technology:

25 Important Considerations for Selecting New Customer Support Tools



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Table of Contents

Introduction	1
Background Definitions.....	1
Initial Planning.....	2
Point #1: Define your vision and mission.....	2
Point #2: Set goals and objectives.....	3
Point #3: Establish a support culture 4	
Point #4: Understand your support processes.....	4
Point #5: Justify new tools	7
Point #6: Involve your customers and secondary support providers.....	7
Customer Support Tools	9
Point #7: Educate your customers.....	9
Point #8: Consider customer self-help tools?	10
Point #9: Consider remote control, diagnostics, and conferencing tools	10
Support Center Tools.....	11
Point #10: Consider monitoring tools	11
Point #11: Consider tracking, managing, and escalation process tools.....	11
Point #12: Consider reporting tools	12
Point #13: Consider knowledge tools	13
Point #14: Consider software distribution and management tools.....	14
Point #15: Consider telephony tools.....	15
Point #16: Consider staffing and workload monitoring tools	15
Second-Level Support Tools	16
Point #17: Consider tools for secondary support organizations.....	16
Selecting Tools.....	17
Point #18: Define your Requirements	17
Point #19: Develop a vendor short-list.....	20
Point #20: Develop an RFP approach to gathering product information.....	20
Point #21: Rate the results	22
Point #22: Establish a win/win partnership with your vendor	22
Project Management	24
Point #23: Integrate your solutions	24
Point #24: Plan and implement your new technology	25
Point #25: Measure your results.....	26
Conclusion.....	28
About Renaissance Partners, Inc.	29

Introduction

Introduction

Since you are reading this booklet, you have reached a point in your service organization that has caused you to consider purchasing new technology to meet your growing needs. You're wise to consider technology and wise to read this booklet. After all, you probably realize that although technology can be an answer to a growing service demand, it can also be the source of great frustration. Poorly chosen or implemented technology creates as many problems as it solves. You can avoid these problems, however, by keeping a few important things in mind.

Background Definitions

Before we begin, we need to establish our terminology because it differs from the older, historical terminology used by customer support centers. The reasons for the new definitions are twofold:

- A recognition of the technology and support interfaces that now exist; and,
- A need to provide a systemic framework in which to define support.

The key terms we use are:

Contacts	Any communications between the client (user of the support organization) and the support organization, including <u>phone calls, e-mail, fax, pager, and the web interfaces.</u>
Problems	Any question or request for service posed by the client of the support organization; including questions from "when are you open" and "how do I..." to reports of bugs or missing capabilities in a product.
Defects	The systemic nature of many problems. Bug reports represent one type of root cause, but many root causes are process oriented. Eliminating the root cause reduces future problem reports and contacts.
Elevation	The normal process for moving an open problem from one level of support to the next higher level to get resolution. When elevation takes place is part of the support workflow definition.
Escalation	The management process for handling abnormal situations to ensure the appropriate level of resources and focus for a problem. Escalation results when the support organization misses its resolution goals or from a customer complaint. Escalation is an exception process whereas elevation is a normal workflow process.

Initial Planning

Nothing is more critical to the ultimate success of a support organization than establishing and maintaining a strong service culture throughout the organization. Key visible components of that commitment are clear vision and mission statements at all levels.

Point #1 ***Define your vision and mission***

Defining vision and mission identifies the organization's values and positions the support center's role in working to achieve organizational goals. Vision and mission statements serve as critical guideposts for keeping decisions on track. They also provide a framework for molding the people, processes, and tools needed to be successful. They directly impact all aspects of support center activity including:

- Service offerings
- Staffing requirements
- Technology purchase and integration
- Training programs
- Information management
- Compensation plans
- Organizational structure

Without these guideposts, there is no clear direction for moving forward. To paraphrase the Cheshire Cat in Alice in Wonderland, "If you don't know where you're going, most any road will get you there." Unfortunately, 'there' may not be where you want or need to be. Only when the support center has a clear understanding of the ultimate goal can it manage its resources accurately and efficiently.

The support center's vision and mission must be rooted in the stated goals of the overall organization and reflect what the organization values. They must flow logically from these values or they will not elicit corporate support and will not focus the support center's role productively. Following is an example of a simple organizational mission statement:

"Western Power is committed to being the low-cost leader in the delivery of electric utility services to its 12 state market."

The support center in turn might develop a vision that focuses commitment on organization-wide efficiency levels that support low cost structures for Western Power. For example:

"The Western Power support center is committed to maximizing customer productivity through world class service and support."

Initial Planning

Once the direction is set the support center can go forward making decisions regarding processes, people and tools that support high efficiency levels; knowing that such decisions and the resulting activities support the strategic goals of the corporation.

For support center personnel, clear vision and mission statements act as guidelines for individuals' decision at all levels of the organization. Individuals become empowered when they understand where the organization is going and what is important. The vision and mission act as the glue to pull the organization together and ensure that everyday decisions will move the organization in the right direction.

If the vision is both strong and clear it should not be subject to the shifting winds of a fast changing environment. Nor should it limit or presuppose the strategies and methodologies for achieving it. However, as the environment evolves the support center must adapt and adopt new ways to achieve the vision through specific goals and objectives.

Point #2

Set goals and objectives

Goals break down the vision into quantifiable levels of achievement with measurable endpoints. Using the Western Power example again, the support center could choose several goals that define how the support center will determine whether or not it is supporting the vision:

- 1) Our customers will never be without access to qualified help resources.
- 2) We will strive to thrill the customer at every opportunity.
- 3) We will meet or exceed our commitment to established budget levels.

Objectives establish the performance measurements that determine whether or not stated goals are met. Objectives provide the rules of the game so that all parties can clearly identify the level of success achieved.

Using the goals above, objectives can be set for 100 percent coverage of specified categories such as hardware, applications, infrastructure and process problems. Measurement could be based on a matrix of resource categories including the central support center, outsourced overflow support, on-line knowledge bases, desk-top self-help tools, and vendor hot lines. Customer satisfaction objectives can be established to measure the degree to which the support center has thrilled the customer. And of course, financial measurements can be generated to determine that the goals have been achieved within the framework of established budget guidelines.

Initial Planning

Point #3 ***Establish a support culture***

Executives often assume that since the support center is a cost center, cutting the budget will directly impact the bottom line. This is a fallacy. People need support so support costs are going to exist somewhere. Companies without support centers tend to rely on informal channels for their technical support. An end user, for example, may request help from a peer or call a programmer on their application support team. As the number of end users grows, the support network is overburdened with problems and requests for help; wasting productivity by drawing employees away from their official tasks to solving the same problem multiple times. For external customer groups the impact is poor customer satisfaction, loyalty and retention.

Delivering world class customer support for internal customers through an effective support center can increase organizational productivity by several thousand dollars per customer, per year. Delivering world class customer support for external customers is increasingly the key competitive difference between similar vendor offerings. As non-technical users proliferate the level and volume of technology support requests are increasing dramatically; forcing the stakes to go up as well.

Point #4 ***Understand your support processes***

Always remember that the tools exist to streamline and assist your process – not the other way around. Far too many organizations make the mistake of designing their process around nifty tools.

Start with the process and develop a flow diagram to illustrate current call handling procedures. Be sure you understand and include the following:

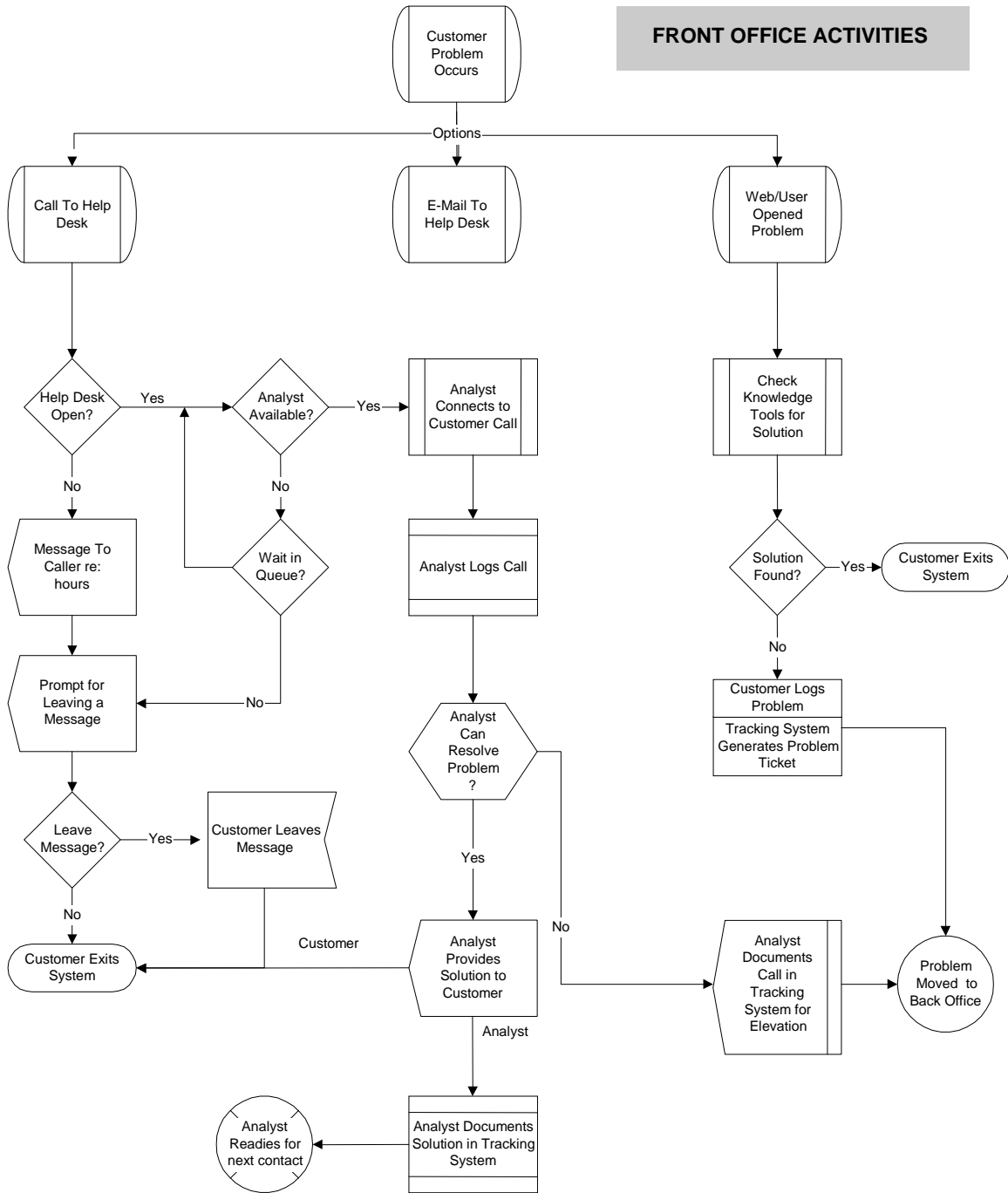
- 1) How are contacts (problems, questions, requests, and faults) received?
- 2) How are problems assigned?
- 3) How are solutions found?
- 4) How are elevations handled?
- 5) How are escalations handled?
- 6) How are root causes identified?

Identify the strengths and weakness in your current procedures. To do this, consider developing something similar to the flow diagram that follows. Your diagram will be specific to your situation and will show organizations, departments, work groups, and individual titles or names, along with footnote references as to the work-step definitions. The footnotes or descriptions referenced on the diagram are best if they appear on the same page with the diagram.

The following diagrams show the major steps in handling a problem, question, request, or fault. Use the diagrams to identify ways to help your organization deliver better service. Ask yourself, “What tools could make our support efforts more effective?” In a later section we review categories of tools to consider.

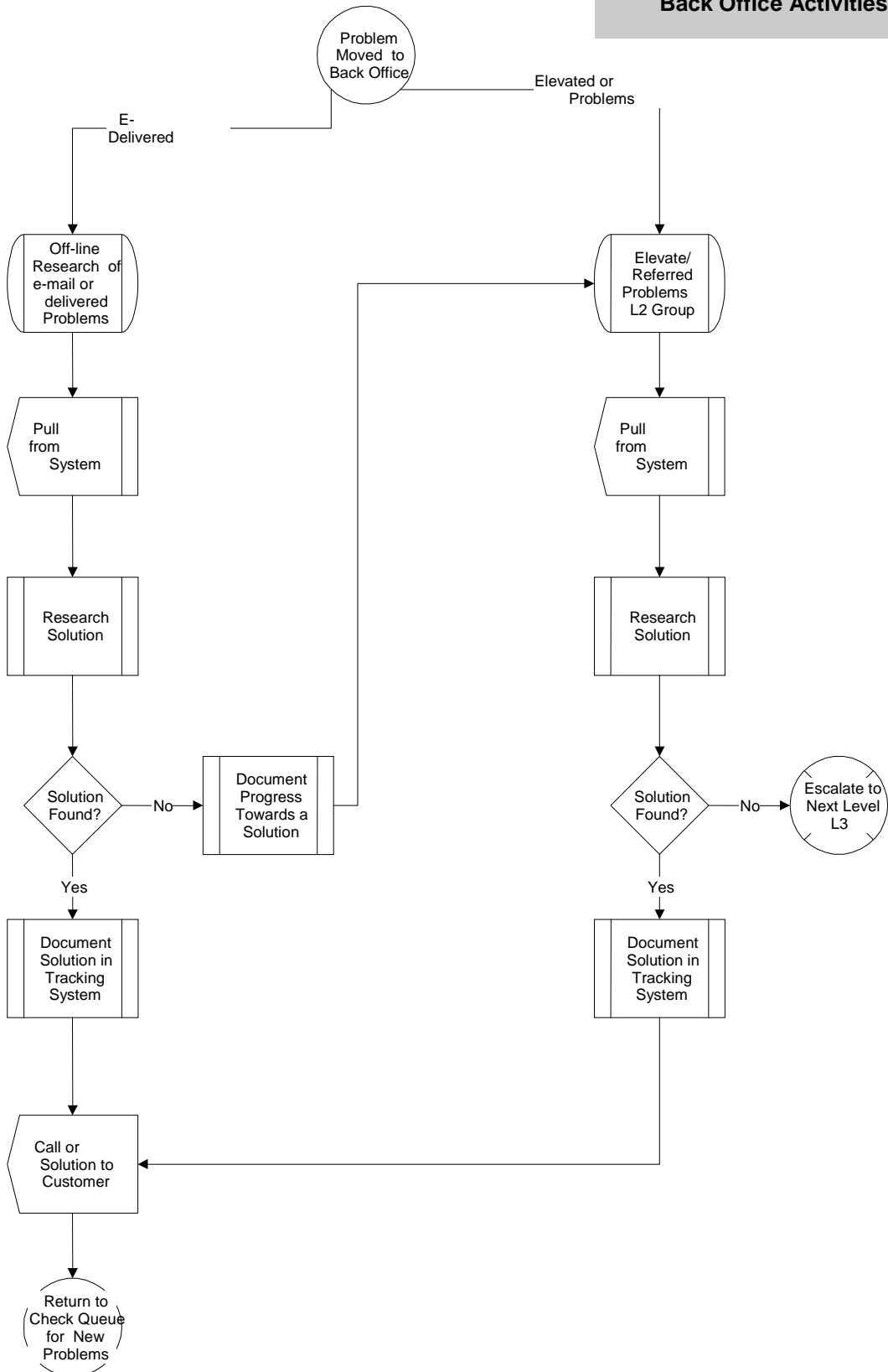
Initial Planning

FRONT OFFICE ACTIVITIES



Initial Planning

Back Office Activities



Initial Planning

Point #5

Justify new tools

Just because a tool exists does not mean it can be justified. Justification is like a scientific experiment; you have to be willing to accept negative results and base your actions accordingly. Imagine if Thomas Edison had said, "Sure it doesn't look good on paper and the experiment says it won't work, but I'm sure I can make this material into an electric light." Fortunately he took a different approach and kept testing new materials until he got a positive test result. Likewise, you will have to put new technologies to the test. Some will show a positive return on investment while others will not. Consider the following factors when computing the return on investment for each technology:

- 1) The incremental financial impact on the support center per contact or request including:
 - Time to receive or log;
 - Time to resolve;
 - Time to assign and manage the life of the call;
 - Time required to develop, maintain, and distribute self-help solutions to customers;
 - Time required to prepare productivity, status, and root cause analysis reports; and,
 - Time required to notify key staff and customers of problem situations.
- 2) The impact on secondary support personnel including:
 - Time and costs to notify assignees and communicate specifics;
 - Time and costs incurred by assignees to resolve problem; and,
 - Time required to properly document the problem resolution and provide feedback to level one.
- 3) The impact on end user (customer) productivity including:
 - Ability of customers to resolve more of their own problems;
 - Speed with which the customer can contact the support center;
 - Speed with which the customer can get problem resolved; and,
 - Increases in customer's abilities to use tools of the their job.
- 4) Determine the impact on customer satisfaction including:
 - Change in customer retention;
 - Gain or loss of revenue from change in customer retention;
 - Impact on customer productivity when poor services cause customers to stop calling; and,
 - Public relations impact from customer satisfaction.
- 5) An understanding of cost including:
 - Initial research time and expense;
 - Initial investment or price of the tool;
 - User training;
 - System design and configuration (customization) costs;
 - Installation and integration costs;
 - Annual maintenance fees; and,
 - Cost to expand, extend, or upgrade the tool.

Point #6

Involve customers and secondary support providers

Initial Planning

When deciding whether or not to buy and implement new customer support tools, determine how new tools would impact your customers as well as those who provide second level support.

Ask your customers questions such as:

- What new services are desired?
- What hours of operation are expected?
- How independent do they want to be? For example, would they rather use self-help tools or rely on the support professional?
- What response time are they willing to pay for?
- What technologies do they want supported?
- How would they react to new technologies (expert systems, Interactive Voice Response Units, or just-in-time training)?
- Do they find remote control or remote conferencing acceptable?
- Would they like to log their own problems?
 - √ via e-mail
 - √ via call/problem management system
 - √ via web browser

Ask your second level support providers questions such as:

- How would they like to receive trouble tickets?
- Do they feel the information they receive is satisfactory?
- What can be done to help eliminate problems from re-occurring?
- How can solutions provided by second level support be saved so that customers and first level support professionals can access them easily in the future?
- Are tasks currently performed by secondary support organizations that should be the responsibility of the level one support center?

Customer Support Tools

Many industries have come to recognize the strategic advantage of allowing customers hands-on access to information for self-help purposes: lower cost of support and increased satisfaction among certain cross-sections of customers. This win/win scenario is made available to support centers through emerging technologies that allow customers direct interaction. Support staff are afforded more time to dedicate to special projects and proactive support. Ask yourself the following questions and then consider what technologies for support might fit on your customers' desktops:

What tools will your customers use?

Organizations differ and the attitudes of customers vary greatly. What one customer is willing to do another is not so it is important to know what your customers are willing to use.

What tools are they capable of using?

It also is important to understand that different customers have different skill levels. From consumers to clerical personnel to accountants to programmers and engineers, each group possesses a different skill set. You may have customers who are willing to use a tool but lack the basic skills to do so.

What technology can you deliver?

Depending on your customers' desktop technologies you may or may not be able to deliver solutions they are willing and able to use. For example, you cannot deliver multimedia solutions if your typical customers do not have multi-media workstations; or networks may lack sufficient speed and customer workstations may be old, slow, or nonstandard, making implementation unfeasible.

Point # 7

Educate your customers

Gaining acceptance of any new technology usage, particularly one that asks customers to interact directly, requires education. When considering the customer base, education is a two-phase process. The first phase involves a marketing campaign to sell customers on the benefits of using the new technology. If customers don't understand and buy into the reasons for using the new technology they will not be interested in learning how to use it.

The second phase is more traditional usage training. In conjunction with the awareness or marketing campaign you need to provide customer training. Few technology tools are intuitive to all people; therefore, you need to provide training on the tools you're asking customers to use. Training is generally more effective when provided in several short sessions rather than one long session. One method is to provide an introductory session that gives people the basics of the product and how to get started. Then, in a few weeks provide a follow-up training on advanced features.

Customer Support Tools

Providing several mini-sessions over the course of a few days or weeks will increase overall attendance levels.

Point #8

Consider customer self-help tools?

New self-help tools allow customers to directly access answers to their everyday questions; decreasing incoming calls to the support center and encouraging customers to help themselves. The support center maintains these tools and analyzes usage for valuable information about common problems and requests. Self-help tools can diagnose problems, recommend how to fix bugs, and provide technical and how-to solutions for common software and hardware questions.

Self-help tools utilize a wide variety of media to offer solutions; including on-line help systems, electronic performance support, on-line tutorials, wizards, expert systems, just-in-time training (like CBT and multimedia training), as well as printed manuals. Expert systems and knowledge bases used by the support people are becoming the same tools that customers can use through web or e-mail interfaces. Knowledge bases are discussed in more detail in a later Point.

Self-help tools work best for customers who don't mind working with technology, who are mobile workers, and those who don't have access to the support center. If self-help tools are easier to use than existing options, or if no other options exist, customers will use them.

Point #9

Consider remote control, diagnostics, and conferencing tools

Remote control packages allow support center agents to remotely take control of a customer's computer or conference with the end-user. The host computer's screen is displayed and the agent takes control of the remote user's mouse, activating commands as needed to resolve the customer's service request. When remote technology is employed customers view the problem being solved and often will know how to resolve it themselves if the problem recurs. Available for most operating systems, remote tools can shorten call duration and reduce call volumes by educating customers during the problem resolution process. Diagnostic tools allow support center agents to test a remote client system; reducing repair time by providing information about the correct parts to affect repairs.

Conferencing tools allow multiple people to connect to discuss an issue. Video conferencing tools allow remote agents to literally see what is being described – particularly important when viewing hardware or the environment.

Support Center Tools

Many support centers are beginning to use sophisticated tools that allow them to more efficiently manage valuable support information. Consider the following Points to assess if any of the tools are right for your operation.

Point #10 Consider monitoring tools

Monitors are automated tools that test for conditions that may require intervention, observations, or further testing. An example of recently developed monitoring technologies is the Desktop Monitoring Interface (DMI); a kernel of code that runs at each desktop developed by the Desktop Management Task Force (DMTF). The code alerts the support center and/or the customer of errors or out-of-tolerance conditions. Self-diagnosing tools such as DMI can trap system interrupts, detect changes in workstation configurations, and provide two-way communications to servers.

Imagine how useful it would be to have a monitoring tool that provides support center agents with alerts or out of tolerance conditions, configuration data, driver settings, and memory information without the customer calling. These tools also can automate corrective actions, resulting in lower call volumes and shorter call duration.

Monitoring tools also provide a public relations benefit because they are proactive. Customers are impressed when they hear, “We know about the problem and are already working on it.” Even more impressive is the ability to contact a customer about a problem they don’t even know occurred.

Point #11 Consider tracking, managing, and escalation process tools

A call/problem management system is the core tool of a customer support center. A call/problem management system allows for efficient management of the call resolution process by consistently logging questions and problems, establishing links between call records and the customer database and call history repository. This type of system also allows support centers to diagnose problems, identify root causes, analyze trends, and measure the performance of both the support center and its customers.

If you use a call/problem management system correctly, you recognize how difficult your job would be without it. You would have to manually create performance reports based on data that would be manually gathered and maintained; or you wouldn’t report performance at all. Without a call/problem management system, customer requests get lost or drop into the cracks leaving support centers almost always in reactive mode. When support centers operate in a reactive mode problems are always urgent and important, staff burns out, and customers are rarely satisfied.

Support Center Tools

With a call/problem management system support centers have a better chance of reaching a proactive mode. Contacts are automatically logged, customer profiles and histories are maintained, and contacts are automatically escalated and reported to the correct groups. Electronic requests are also logged. The most proactive features that a call/problem management system provides also are the most valuable: call/problem management systems help detect trends, give valuable feedback to training, learn from trends, and actually help avoid problems. In the end, your company is more productive – the ultimate goal of your support center.

Point #12

Consider reporting tools

Reporting on call history, trends, and workloads are all key to the success of your support center. A call history can be used for root cause analysis. Understanding the root cause of problems enables you to reduce the number of contacts; allowing you to find permanent fixes. Root cause analysis may identify:

- The central problem and permanent fixes;
- Ways to speed solutions in the future;
- Necessary changes in customer training programs; and,
- Ways to distribute solutions to customers so that in the future similar situations can be resolved without calling the central support organization.

Reporting on workloads can assist with staffing and service level management. Many reporting requirements can be contained within a call/problem management system. You also may find it advisable to export key data for graphical reporting or in-depth statistical analysis. Reporting shows trends that can be used to support proposals for change; particularly important when trying to justify additional resources or new tools.

Quality reporting shows a level of maturity within your support organization. When first building a support organization you may have little formal reporting. As the organization matures in its support processes you will see an expanding need to report on and understand call history and workloads.

Support Center Tools

Sample List of Reporting Options

Average speed of answer	Incident volume by method received:
Call duration	<ul style="list-style-type: none">• calls
Number of open problem tickets	<ul style="list-style-type: none">• e-mail
Customer profile and configuration	<ul style="list-style-type: none">• walk-ins
Percent of calls delayed	<ul style="list-style-type: none">• direct customer input
Percent of calls abandoned	<ul style="list-style-type: none">• fax and others
Percent of problems escalated	Incident volume by:
Percent of incidents closed on initial	<ul style="list-style-type: none">• problem type
Average expended time per call	<ul style="list-style-type: none">• time of day
Average expended time per incident	<ul style="list-style-type: none">• customer ID
Average incident volume per agent	<ul style="list-style-type: none">• agent assigned
Average daily phone time per agent	Cost per call by call type
Average time to resolve calls	Severity by assignment group
	Call type by assignment group

Point #13

Consider knowledge tools

There is an important distinction between information and knowledge. In many organizations there is an abundance of information in the form of notes, memos, lists, problem reports, and other bits and pieces of data collected over time. Individuals in the support center possess knowledge from assimilating the information into a form they can use to resolve problems. The most successful support center people are those who remember who worked on a similar problem in the past or where they saw information about a particular issue. The new model for support is to systematically collect information and turn it into knowledge by organizing the data, putting it in a database in a consistent form of issue/process or symptom/solution. There are alternative approaches for organizing and retrieving information but the net effects are knowledge tools and a knowledge base.

Knowledge tools involve two primary integrated technologies and several peripheral technologies. The most powerful knowledge tool is an expert system. Expert systems allow for storage and retrieval of knowledge in a way that helps you get the necessary information quickly and easily. An expert system allows a novice to wear the hat of an expert. By simply accessing knowledge using a decision tree structure (a series of yes or no answers), a rule-based system (using if-then paths), or a case-based system

Support Center Tools

(using “key word” systems), first-level agents can provide answers to complex technical questions in a matter of moments. As you can imagine, this means major savings in training time and costs.

However, for an expert system to be useful it has to be filled with data called knowledge. Knowledge consists of the actual answers to problems formatted in a manner that allows the expert system to retrieve it. An example of knowledge might that be the on/off switch for an XYZ printer is located underneath the front right corner. The knowledge is expressed in language the retrieval engine understands.

The challenge with expert systems is whether to input the knowledge yourself or buy off-the-shelf knowledge packages from vendors. As a rule, it makes sense to buy off the shelf for standard shrink-wrap products. This provides you with the knowledge you need to launch your expert system. All special applications, whether built in-house or contracted, require time and effort to build your own knowledge base. As new problems are resolved that are unique to your company the new knowledge can be added and stored in the knowledge base for later use.

Another way to implement knowledge is through fax services. These can be integrated with your Interactive Voice Response (IVR) system allowing customers to request the information sought and bypass a support center agent. Routine communications also can be faxed by request of the agent; a good follow-up to a customer’s how-to questions. By providing documentation that offers more information on the application or hardware in question, future calls can be avoided ultimately decreasing call lengths and increasing customer independence.

Still another knowledge tool is a reference library. Customers can directly access information through vendor reference manuals, CD libraries, e-mail libraries, electronic books, and commercially distributed information bases. All these tools are relatively inexpensive and allow customers to circumnavigate a call to an agent. Customers can automatically download the latest software patches, FAQs, training tutorials, vendor information, as well as post questions for feedback from peers.

Point #14

Consider software distribution and management tools

To streamline training at a support center it is helpful to have software distribution and version controls in place. These tools allow for the distribution and installation of software and upgrades onto Remote LANs, servers, and workstations without sending agents to a specific location; thus, simplifying the troubleshooting process, decreasing training costs, and standardizing the desktop environment. Software management tools also will help ensure compliance with license agreements.

A similar tool called asset management can maintain inventory control, costing, chargeback, and version control for hardware, software, networks, and communication devices. Asset management tools help improve problem-solving capabilities by providing current configuration information about a customer’s system. Asset management tools can be integrated with software management tools, call management tools, and configuration polling; allowing for better financial controls and reduced budgeting efforts.

Support Center Tools

Point #15

Consider telephony tools

The first major telephony tool is Interactive Voice Response (IVR). IVR allows callers with touch-tone phones to query computer systems, solve minor problems such as terminal and password resets, or route calls to appropriate support personnel. An IVR is generally a piece of hardware that captures all incoming calls and responds to the caller with a greeting and various options. The caller chooses options by pressing designated numbers on the telephone keypad. With each option the IVR responds to the customer with another voice message, either providing the desired information or other options.

A well-implemented IVR system can serve as a call dispatch unit that operates 24 hours a day. Many IVR units can identify customers and provide agents with “screen pops” of customers’ history and configuration information. IVR units also can distribute solutions to customers, perform customer surveys, and integrate with your computer system for faster call resolutions.

IVR also can be used to automate repetitive tasks such as network printer resets or password reset functions; reducing the number of contacts that support center personnel have to handle and speeding up solution delivery. Not only can IVR units automate repetitive tasks, they can shorten call duration and encourage customer independence.

The second major telephony tool is Computer Telephony Integration (CTI). The integration of telephone and computer technologies recognizes and identifies incoming callers using Automatic Number Identification (ANI) codes. Call/problem management systems with CTI interfaces process ANI codes and perform “screen pops” to open new call records or bring up open tickets before agents speak to customers. ANI information also can be used to route a call to the agent that originally logged the call or to the most qualified agent.

CTI reduces call time by shortening the preliminary data-gathering steps. It also eliminates some agent-answered calls and increases first-call resolution rates.

Point #16

Consider staffing and workload monitoring tools

The most valuable – and expensive – resource within a support center is the staff. Optimizing staff utilization is of primary importance. Staffing tools help determine the staff size required, what hours of the day staff are needed, how schedules should vary based on the day of the week, and what skill sets are required during each shift. Staffing tools use scheduling assumptions and call history to predict service levels. Staffing and workload monitoring tools should use inputs from your phone system (automatic call distributor) such as call arrival rates, abandon rates, and call duration. Inputs from your call/problem management system, such as call arrivals by type and problem work time off the phone, also are needed. These tools can be used to negotiate with management as to the needed staffing levels in relationship to desired service levels. With an analytical tool that predicts service levels, management can understand the impact of spending changes on staff and can be assured that schedules are optimized.

Second-Level Support Tools

Second-level support organizations vary widely but include functions such as hardware repair, software distribution, network management, external vendors, developers, LAN and server administrators, personnel, and purchasing. Rather than identify all of the possible tools that second-level support organizations need, we ask that you consider the following: who are your secondary support organizations; what are their true needs; and, how can you integrate your tools and work processes with them.

Point #17 ***Consider tools for secondary support organizations***

When considering new tools for the support organization, consider the needs of others outside the level-one support role. Many times secondary support is handled by specialized groups that need access to the systems and procedures of the support center. These groups may be internal to your organization or external vendors. By considering these groups to be extensions of the traditional support center or level-one support, you will better serve your customers. You may need new tools or the ability to integrate tools such as Depot Repair Tracking, Training and Skills Assessment, Field Service Management, Personnel Management, Service Level Reporting, Change Management, Remote Diagnostics, or portable tools that allow replication of data from your call/problem management system. Ask yourself, “Who are the secondary support organizations that support center agents work with on a daily basis and what will improve integration between the two groups?” A few tools you might consider are:

Depot Repair Tracking

A tool that tracks depot hardware, work in progress, hardware swaps, and spare parts inventories as well as repair costs and time.

Training/Skills Assessment

A tool that offers assistance to trainers in measuring employee skills, monitoring skill development, suggesting individual training programs, and registering employees for classes to improve performance and productivity.

Field Service Management

A tool that tracks warranties, maintenance contracts, scheduled maintenance, and mean time between failures. This tool also forecasts staffing and parts requirements that in some organizations include all call management functions.

Personnel Management

A tool to provide assistance to the Personnel Department in developing performance reviews and career planning, as well as tracking key performance indicators.

Selecting Tools

Selecting Tools

Selecting appropriate tools requires a systematic process based on vision and mission, long-term plans and strategies for support, and current infrastructure. Tools decisions should not be based on what server is in place today or what product you have in place or have used in a prior company. The current capabilities of call/problem management systems are dramatically advanced from just a few years ago. Today, call/problem management systems truly have the capability to radically change support and improve support capabilities and efficiencies. The key to selecting the right tools is taking the time to understand what you need today and in the future. The cost of buying and integrating new tools is significant, but so are the paybacks.



Point #18

Define your Requirements

When you take time to review the culture, objectives, processes, people and existing tools, you lay a strong foundation for future success. You increase the support center's potential to have access to the tools and technologies necessary to achieve the performance levels established in mission statements and corporate objectives. The foundation helps you select and implement the best technology for your organization; addressing the requirements definition with confidence.

When technology requirements are a logical extension of your organization's goals and objectives a greater importance is placed on the core attributes of the technologies evaluated, minimizing the emotional impact of interesting, but less valuable, 'gee-whiz' features. A technology investment is a long-term decision and a strong understanding of what is truly important increases your success with technology selection and implementation.

Since each environment has differences, it is important to document your specific requirements. Below we identify a number of specifics that may be appropriate for a call/problem management system. The intent of the list is to show examples of requirements in columnar format to allow for comparison once alternatives are identified. The list is not intended to be exhaustive. Determine and list your own requirements (feature, function, or performance characteristic) and rate the importance of each, making product reviews more relevant to your needs.

Each feature is given a weight factor based on importance. Then each vendor is rated for each feature. The vendor rating is multiplied by the weight factor to establish a score. In the example below, the higher rating represents the better-implemented feature; a higher score going to the vendor with the best features. The weighting factor differentiates between critical features and those that would simply be nice to have. It also improves the separation between vendors as shown in the example. To minimize any bias, define the features and the weight factors before you look at the various vendor products. Usually multiple people are involved in the evaluation process. Evaluate vendors on the product features first, then look at pricing, as the price is more negotiable than the features.

Selecting Tools

Features / Functions	Importance	Vendor A	Vendor B	Vendor C	
	Weight	Rating	Score	Rating	Score
<i>EXAMPLE:</i> Quick logging of calls	4	2	8	1	4
				3	12
Quick logging of calls					
E-Mail receipt of call tickets					
Easy to customize fields					
Able to define new call types					
Maintain caller history					
Provide solution assistance					
Automatic call elevation					
Automatic call escalation					
On-line census of configurations					
Configuration database					
E-Mail and beeper alerts					
Staff and service level modeling					
Flexible means to select assignees					
Change Management					
Packaged knowledge available					
Expert System (Knowledge Management)					
Graphics Capability					
Scripting Capabilities					
Multiple timer features					
Linking multiple contacts to one problem					
Two way mainframe communications					
Invoicing/Bill-Back					
Key Word Search					
On-Line Documentation					
Open Architecture					
Problem History					
Problem/Cause/Solution Linkage					
Remote/Customer Access					
Security					

Selecting Tools

Features / Functions	Importance	Vendor A	Vendor B	Vendor C
	Weight	Rating Score	Rating Score	Rating Score
Staff/Resource Management				
Substring Search on Files				
User Report Writer				
Product Interfaces				
Accounting/Financial				
Automatic Call Distributors				
Electronic Mail				
Expert System				
Laptops				
Manufacturing				
Network/System Inventory Software				
Network/System Management Software				
Sales/Lead Tracking				
Voice Response Systems				
User Interfaces				
Auto-Fill Capability				
Context-Sensitive Help				
Pop-Up Dialogue Boxes				
Pull-Down Menus				
Quick-Key and Menu Based				
User Customizable Menus				
User Definable Fields				
<u>General Considerations</u>				
Feedback from reference checks				
Flexibility to handle future needs				
Vendor support quality				
Vendor training & consulting				

Selecting Tools

Point #19 *Develop a vendor short-list*

Numerous vendors claim to have the product you need for most support tools. The vendor short-list is designed to reduce the number of vendors seriously evaluated to a reasonable number. Gathering qualifying information from the vendors identified generates the vendor short-list. To qualify or eliminate a prospective vendor it is important to clarify the most important criteria. You may eliminate certain vendors because their product does not support certain critical features or because their product does not support a large number of important features. Once areas are identified as essential to successful operations do not compromise on these points.

Why research and analyze proposals from vendors who were disqualified due to overriding criteria? By creating a short-list you save time and energy for yourself and vendors.

Point #20 *Develop an RFP approach to gathering product information*

Research pertaining to enterprise acquisition processes and evaluation of procurement effectiveness indicates that best-in-class deals typically are achieved by organizations with formal procurement strategies. Formalizing the procurement process involves more than requesting three bids. Independent studies show that implementing a formal request for proposal (RFP) process reduces the initial procurement as well as the total cost of ownership over the life of the system.

The RFP is a method for detailing the desired solution. An RFP also serves as a tool for formal and consistent evaluation of vendor offerings. The RFP should be part of the documentation that leads to a legal contract. All stakeholders in the support process must provide input. The content of an RFP generally will contain the following:

- General questions about the vendor company such as size, stability, years in business, and profitability;
- The company's legal requirements and disclaimers detailing who pays the cost of responding to the RFP, the number of copies to be returned, a schedule, and a brief description of the process;
- Questions about the functions and features identified in Point #18. Avoid identifying the total weighting scheme, but ask for details or explanations of features not fully implemented out of the box;
- Questions about product support such as hours of operation, size of the support team, different support options available, tools for troubleshooting, availability of source code, and training;
- Questions about integration and customization of the product and the impact on support;

Selecting Tools

- Questions about various pricing structures, including a standard configuration pricing sheet for comparison purposes; and,
- Questions about the vendor's approach to helping with project implementation and the related costs.

Selecting Tools

Point #21 **Rate the results**

Whether you gather short-list vendor information informally or through a formal RFP process, the net result is that you have a lot of information requiring comparison. There are several rating methodologies you can apply to the data collected. Here is one simple and effective evaluation system. First, quickly eliminate all product options that do not meet your critical-to-operations criteria. The remaining product options can be rated by assigning each critical point a weighted score reflective of your priority assessment. Then total the results. For example:

First, using the following scale, weight each feature identified with an importance rating:

4. Critical to operations
3. Important
2. Useful, but not essential
1. Not Important

Then, using the following scale, rate how individual products perform the function or feature:

4. Excellent
3. Very well
2. Adequately
1. Not well
0. Not at all

Multiplying the importance weighting score by the product performance score allows you to rank each product's performance for each function. By totaling all the features, you arrive at a total product score. Your best product options will become very obvious; driving the development of a list of vendors who should receive the RFP. There are other approaches for developing a feature comparison system that are not noted here. Regardless of your approach, the keys to successful evaluation are the development of a process before evaluating vendor products and consistency in how comparison and scoring.

Point #22 **Establish a win/win partnership with your vendor**

A clear understanding of what is important to your organization and to vendors is critical. Prepare the implementation plan together, clearly defining the vendor resources you can call upon and benefit from most. Remember, when the vendor leaves, your staff needs to be self-sufficient.

Also, remember that you are buying a total solution so you want your vendor to be a business partner. Be sure to consider implementation packages, maintenance contracts, user limits, costs to add new users (seats) at a later date, costs for add-on modules, and add-on services such as training.

A good vendor will seek a long-term relationship with repeat business in the form of additional products and services or annual maintenance contracts. No one knows the product(s) better than the vendor. Ways to leverage your vendor's experience include:

Selecting Tools

- Having your vendor train at your site rather than sending one person to class and expecting that person to train everyone else;
- Having your vendor assist on site in the initial set-up and customization;
- Preparing extensive background data on your organization, your needs, and your objectives before the vendor's training and support personnel arrive; and,
- Acting as a reference site for the vendor in order to get special attention.

Generally, the costs of software or other tools are a minority in the costs associated with an implementation project. Do not underestimate the cost of retraining your staff, the cost of changing procedures to maximize the benefit of the new tools, and the impact on customers or secondary support organizations. Your vendor has a good understanding of these issues so it would be wise to listen to vendor input.

Project Management

Before moving on to the final phases let's step back and ensure that we have progressed correctly to this point. Review that you have defined your service needs consistent with organizational goals and have performed a complete and critical assessment of your current operations. These two steps allow you to accurately define technology requirements and manage the procurement process. If satisfied with your progress, the next phase is the implementation and integration of the selected technologies.

Point #23 ***Integrate your solutions***

There is no excuse for independent technology today. Shared information creates knowledge and value that cannot be realized in independent systems and technologies. Systems integration creates powerful service and support solutions by initiating relationships and exploiting the cumulative strengths of the component technologies. Applying 'best practice' concepts and techniques to the development and operation of your customer support center will help you realize increases in capacity and performance. The effective integration of service and support technologies can be key to achieving the benefits of a world class support organization.

When planning to expand your technology remember that its effectiveness centers around your ability to successfully integrate the diverse technologies into a cohesive whole. Complete integration creates the following relationships that make an organization more effective; the synergy generated being almost as important as the efficiencies created.

- 1) **Efficiency** — one-time data entry should be the rule. Integrating customer databases, problem/solution knowledge bases, and proactive alert technologies can reduce call duration, increase first-level resolution, and help optimize staff resources.
- 2) **Integrity** — consistency and integrity of information are important byproducts of single data entry and are critical to your ability to manage efforts through accurate reporting.
- 3) **Intelligence** — when you combine the built-in features and intelligence of your service/support technologies you can create intelligent new functionality that did not exist in the separate components. Examples include:
 - Intelligent customer routing through IVRUs;
 - ACDs with customer status and history "screen pops" captured in your problem management system; and,
 - Proactive problem recognition and resolution through monitoring and diagnostic packages routed through your problem management system.

Project Management

- 4) **Cross-functional knowledge** — integration not only creates a sophisticated, well-oiled engine, it creates the enterprise-wide ability to leverage data from across internal departments, third-party resources, and vendor organizations. Cross-functional knowledge is the basis of all effective customer care and/or customer relationship management programs.

Point #24

Plan and implement your new technology

Give yourself enough time to implement it right. Fight to make deadlines realistic and achievable. There is great truth in the adage, “If you don’t have the time to do it right, do you have the time to do it over?”

You will be most successful when you designate a project champion with three critical characteristics:

- 1) The appropriate knowledge and perspective to manage the overall task;
- 2) The organization and communication skills to successfully lead project team(s); and,
- 3) The flexibility in duties and responsibilities to devote a significant amount of time to ensure it comes together correctly.

These three things are absolutely critical and cannot be overlooked. If you cannot guarantee that each condition will be met serious consideration should be given to finding an external resource that can meet all the requirements.

In every successful implementation there are two major elements: definition and control. These are mandatory to the successful completion of the project. An effective project manager knows how to bring together the definition and control elements and operate them efficiently. The project definition must establish the project’s purpose, the tasks to be performed, a detailed schedule with critical dates for each element, and budget requirements and limitations.

When the definition is clear, you must establish control components that monitor, measure and manage the project; including establishing and building an effective team(s), obtaining consensus on the processes and procedures for project coordination and logistics, and monitoring mechanisms. You also must establish clear action processes for responding to changes and challenges associated with the teams, coordination, and monitoring components. Finally, define a methodology to determine when the project is completed satisfactorily. All too often the final report is the most difficult to make so the project lingers unresolved and without closure.

Project tasks include:

- A formal needs analysis and requirements definition;
- A detailed project plan complete with tasks, timelines, responsibilities, and cost estimates;
- Vendor negotiation and product procurement;
- Systems installation and systems integrity testing;
- Configuration and customization of screens, database links, escalation paths, and performance reports;

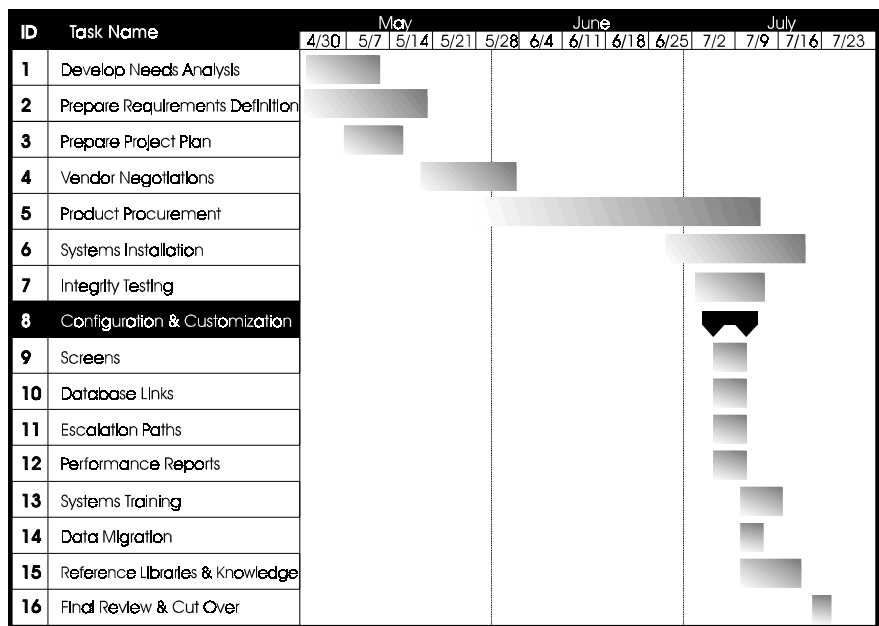
Project Management

- Systems training and orientation to new processes;
- Data migration from existing system;
- Development and implementation of reference libraries and knowledge bases; and,
- Final review and cut-over.

Plan to run technologies parallel for a designated period of time, testing the integrity of the new system, performing a final work flow review and implementing the final cut-over.

With a project of this size and critical nature, it is important to work from a formal implementation plan document. It can be as simple as a spreadsheet with tasks, dates and responsibilities or a sophisticated project management program that tracks the interrelationships and critical paths of the projected work.

Make sure in your final report to clearly document the people and process issues that need to be addressed to take full advantage of the new automation environment.



Prepare a formal plan for the implementation project (example for illustration purposes only).

Point #25

Measure your results

Prior to receiving authorization to spend money on new support center tools you may need to define the benefits. Increased call volume per staff member, higher resolution at level one, increased levels of customer satisfaction, improved end-user self reliance, reduced time for support professionals to be ready to handle calls, and improvement in availability statistics may be among the measurable benefits that are critical to your

Project Management

organization. We recommend that whenever possible you benchmark pre-change performance by gathering statistics before implementing changes. After initial implementation, say at 3-month intervals for the first year, determine key measures and plot them graphically for everyone to see. While a product may be installed in a day, it takes a lot of time and effort to create an environment where consistently high performance levels are the norm. By periodically measuring performance, evaluating alternative actions, and brainstorming new ideas, you can evolve your organization to one that is truly world class.

Conclusion

Conclusion

This booklet has given you a lot to think about when acquiring new tools. We hope you understand that tools alone do not create world class support. Be prepared to continuously improve; the journey is ongoing. If you are committed to improving the culture, processes, people and tools that are the foundation of world class support, you're well on your way to success.

About Renaissance Partners

About Renaissance Partners, Inc.

Renaissance Partners, Inc. provides services throughout North America and around the world, including:

- SCORE: Support Center Opportunity and Risk Evaluation
- SelfSCORE, Self-Administered Support Center Evaluation Tool Kit
- Design and implementation of new or re-engineered Customer Support Centers
- Consolidation of multiple Customer Support Centers
- Support center operation and management: short term and permanent solutions
- Development of Service Level Agreements and management strategy
- Requirements analysis, review and selection of Customer Support technology
- Requirements analysis, review and selection of outsourcing services
- Development of effective problem elimination strategies
- Development of effective staffing and scheduling models and strategies
- Customer satisfaction and requirements surveys
- Business process re-engineering
- Workflow redesign and documentation
- Total Cost of Support study and analysis
- Training for Customer Support Center management and staff



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