

# The Business Case for a Fresh Start

The New Requirements Your Existing Technology Won't Deliver

WHITEPAPER

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## Executive Summary

Reluctant skydivers are said to ask, “Why should I jump out of a perfectly good airplane?” Service and support executives may feel the same way about their technology suites. Sure, they’re not perfect, and sure, it took way more time and money than expected to get them set up. Maybe cost of ownership is too high, and there are undoubtedly a handful of issues that the users complain about incessantly. But ... it’s working now. Why even consider replacement?

The reality is, service and support has changed radically over the past decade. Customer expectations have changed: they want instant gratification and complete control over their vendor relationships. Support models have changed. What used to be a simple one-to-one relationship between a vendor and customer has now evolved into a much more complex network with partners, third-party forums, distributed knowledge repositories and multichannel interactions.

Key Performance Indicators (KPIs) for support are changing to reflect this new reality. Organizations still must manage to the usual operational measures—time to relief, first contact resolution, agent or engineer productivity—but they must also measure their performance against new KPIs that measure self-service success, contact deflection, the value of knowledge, and the effectiveness of support communities. Although these new KPIs are harder to measure, they are essential to managing the entire customer experience, a customer experience that in large part is created not by direct interaction with customer-facing staff, but with a broader ecosystem that vendors control only indirectly.

Existing technology was built for one customer, one call, one resolution: wash, rinse, repeat. Legacy tools focus on escalation, when what’s needed is collaboration. They focus on compliance, when what is needed is empowerment. They focus on customer transactions, when what is needed are customer relationships and customer success.

Without a technology restart, service and support organizations struggle to meet the demands of today’s customers and business models. With new technology, organizations can dramatically lower cost by empowering customers to help themselves and each other. They can measure and manage the entire support experience—not just what happens to get logged as a service request. And they do this without trying to teach an old tool new tricks. Many companies find themselves spending more than a new license cost to extend, integrate, customize and twist their legacy tools to meet modern requirements. In this paper, we’ll explain why it’s often better, easier and cheaper to start fresh.

## Customer Expectations Have Changed

One senior support executive we know has an urn on her desk labeled “Ashes of Problem Customers.” This tongue-in-cheek paperweight serves as a reminder that all customers—all of us—are becoming “problem customers.” It’s not that we’re trying to be unfair or difficult; it’s just that expectations are increasing so quickly, it’s hard for customer service organizations to keep up.

**Customers expect instant gratification.** Want to listen to a new song you heard on the radio today? Download it from the iTunes music store and crank it up. Want to know where the closest drugstore is and how late they’re open? Pull it up on your smartphone. Need money in your checking account? Log on and make a transfer. Can’t get your new widget to work? Trying to figure out how to update your accounting software? Well, customers expect help right away. “Your call is important to us” just doesn’t cut it.

**Customers expect to be in control.** We know of a few companies that, in a misguided attempt to save money, refused to publish their 800 numbers. Now, most customers want to self-help most of the time.\* But sometimes, people do need to talk to a human. And the companies that try to control their customers by hiding 800 numbers find instead, that their 800 numbers are posted on forums, along with brand-damaging rants about how hard they are to do business with. Customers demand to choose how to deal with their vendors.

**Customers expect fair dealing and transparency.** Every product and service has problems; how companies handle these problems are the moments of truth that drive loyalty—or erode it. For example, if there’s a defect that the vendor knows about, customers overwhelmingly want to know, too. Sales and marketing may complain that publishing known issues is a surefire way to arm the competition, but in reality, customers respect companies that give customers all the tools they need to keep safe and current. They want to be treated like grown-ups.

\* In our research, self-help interactions outnumber calls and online cases by a factor of 10:1, 100:1, or more.

**Customers expect to be self-sufficient.** Support organizations think about call center or contact center operations obsessively. So it's easy to forget that customers don't. From the customer's perspective, they want products and services that just work without much fuss or thought. If they aren't getting what they need, calling (or logging an electronic case, or starting a chat session) is likely the last thing they want to do. They'll try asking friends and colleagues; they'll search on Google; they'll pull up forum postings; maybe they'll even go to your site. It's only if all of these techniques fail that they'll log a service request. Customer contacts represent everyday business for service and support organizations, but they're unpleasant detours for most customers. Customers want to take care of themselves.

**Customers trust their peers more than vendors.** Consumers and business buyers are increasingly discounting vendors as sources of information in favor of their peers. As demographics shift towards the post-Baby Boom generation, those born after 1964, this trend is growing. While "word of mouth" has long been a staple of marketing strategy, the Internet has enabled collective word of mouth on an unprecedented scale. Essentially every product and service is rated online, either on a provider site (such as Amazon) or on a third-party site (such as Yelp, TripAdvisor, or Angie's List.) And, almost every product and service is supported by peers in communities, forums, wikis and expert blogs. Peer support models aren't an excuse for companies to abdicate their responsibility to their customers, but they are an important force that can't be ignored, either.

## Support Models Are Shifting

In the not-very-distant past, service and support was delivered directly. Field service professionals came on-site. Contact center professionals answered the phone and responded to e-mail. The customer experience was delivered and controlled by people—generally, people who worked for the company that sold or resold the product.

Back then, the prescription for superior customer experiences was clear: hire the right people, give them the right training and resources, and then reward them for efficiency and good customer outcomes. There were obviously many tactical details to get right, but the strategy, at least, is simple.

Today's support model is anything but simple. Consider:

- Customers buy many products and services that need to work together flawlessly to deliver value. If a customer is having problems accessing an enterprise application, the problem could reside with (a) the application, (b) the database that the application uses, (c) the operating system of the server, (d) the web server software, (e) server hardware, (f) any part of the network, (g) the user's browser, or (h) some other part of the user's computer. (And a computer maven will say that this brief list grossly oversimplifies the situation.) When that customer has a problem, whom do they call? And how long is spent narrowing down which one or more of the seven vendors has the real problem?
- The value of support is fiendishly difficult to measure. It's relatively easy to measure support costs—but even the most miserly CFO knows that the customer backlash against poor customer service costs more in customer retention than slashing budgets saves. If businesses sell support contracts, they can manage to revenue and margin targets, but even these don't tell the whole story. The true value of support comes from enabling customer success, perceived value, good references and repurchases. As a matter of fact, as we've argued elsewhere <sup>i</sup>, service and support should be treated as the revenue engine of the enterprise. Unfortunately, it's nearly impossible to quantify service and support's role in a single sale, or in the overall top line. So, deciding how much to invest in customer service is a difficult judgment call. What's certain is that the value of support can't simply be measured inside the support organization, so leaders can no longer rely on the direct cost-and-revenue models of the past. Today's business is more complex.
- Companies no longer directly control their customers' service and support experiences. Customers sometimes call or write or drop by a store, but more often they ask friends and colleagues, do a Google search, check the forums, or—best case—visit your support website. Companies can influence all of these channels. For example, they can contribute to forums and provide special backline support to high-value forum participants. Or they can use search engine optimization (SEO) to push high-value support content up the search rankings. And they certainly can invest in the best online customer experience possible for customers who do visit the site. But nonetheless, customers' perceptions of the brand are largely created by things that happen outside of a one-to-one conversation between employee and customer.

<sup>i</sup> *Making Service and Support Your Revenue Engine: The Initiative That's Too Important to Delay.* Kay and Hines, 2009.

As we visit service and support leaders, we get to see many strategic plans and organization charts. And with few exceptions, almost all the headcount, investment and management attention goes to the relatively few direct customer-employee interactions. We appreciate executives' desire to manage things they can directly control, but just from the numbers, this doesn't make sense. Something needs to change: investment needs to align with the customer experience, and the customer experience is increasingly indirect.

### New Customer-Centric KPIs

Managers focus on direct support because they're measured on direct support. Common industry practice is to measure nearly everything about employee-to-customer interactions, and to ignore almost everything else. Service levels, time to answer, average handle time, first contact resolution, cases closed per day or month, backlog, customer sat—all of these are direct measures. Of course, direct measures are important, but if direct interactions represent 10 percent or less of your customers' experience, they're clearly not sufficient.

New KPIs are required to help organizations and their leaders make more informed decisions about what to do and where to allocate their resources. They need to consider indirect support delivery vehicles such as forums and self-service. They need to look at the health of knowledge-sharing and collaboration inside the support organization—the capability of the organization as a whole should far exceed the capability of the individuals inside it. And they need to look at the entire service delivery ecosystem, including other vendors, business partners, outsourcers and other users.

Primarily, they need to center on the customer. "First contact resolution" measures a company's experience with its customers, but "loyalty" measures the customer's experience with the entire ecosystem. The emerging measures for support need to put the overall customer experience first.

IBM researcher Dean Spitzer cautions that generic KPIs are fine for making sure that you're not performing below industry norms, but they're nearly useless for taking your business to the next level.<sup>ii</sup> New KPIs that reflect a new differentiated strategy are required to focus management attention properly. For example, Spitzer cites Dell's use of the "Days to Cash" metric to drive its strategy for just-in-time manufacturing and supply chain automation. Similarly, Southwest was the first airline to track—and compensate—based on turnaround time, reducing the time from each arrival to the next departure, making sure everyone

understood and contributed to Southwest's successful strategy for maximizing the utilization of expensive airplanes and flight crews. Neither of these transformational metrics would have been found in "industry best practice" dashboards, precisely because they were transformational: they took Dell and Southwest to new leadership positions. So, too, service and support organizations must extend their palette of KPIs to include new ones that reflect the new customer expectations and support models discussed in this paper. (The next two pages provide a few specific KPIs that we hope will provoke thought and discussion.)

One challenge with new KPIs is that they're not always easy to measure precisely. Average time to answer probably isn't the most important thing to measure in the customer experience—as long as times are reasonable, 10 percent, plus or minus, isn't nearly as important to customers as what happens once the phone gets answered. And, more significantly, it's not as important as what happens the 50 other times they had an issue and chose not to call. Yet, it's so appealing to operations managers because it can be tracked and calculated to the millisecond! Remember the man searching for his keys under the streetlight, not because he'd lost them there, but because that was where he could see best. Imprecise measures of the right things are far more valuable than perfectly precise measures of KPIs that aren't very relevant.

An additional challenge with emerging KPIs is that they require ongoing explanation and communication—they're unfamiliar to people. In fact, this challenge is really an opportunity in disguise. By reinforcing what the new measures are, and what makes them key performance indicators, support leaders will be able to repeatedly reinforce their strategy and create alignment. If a busy support rep hears something about the importance of self-service, she might well pay it little heed as she works through an endless queue of service requests. But, if she's measured on self-solve rate, then she will really need to stop and think about the implications her individual actions have on the broader objective of the support organization: making customers successful by all possible means, direct and indirect.

<sup>ii</sup> *Transforming Performance Measurement: Rethinking the Way We Measure and Drive Organizational Success*. Dean Spitzer, 2007. Also, personal conversations with the author. See also *Good to Great: Why Some Companies Make the Leap... and Others Don't*. Jim Collins, 2001.

## Emerging KPIs for Service and Support

### Assisted Support

- **Contacts Per X (CPX)**, where “X” depends on the specific business model—per product sold, per support contract, per support revenue, per user, etc. Self-service mavens Bill Price and David Jaffe identify CPX as the key transformational metric used to “challenge demand” at Amazon and other leading customer service providers. <sup>iii</sup> As service and support organizations partner with the rest of the organization to remove the problems from the customer experience, and as indirect channels increasingly become the preferred way for customers to solve problems, CPX should **decrease**.
- **New vs. known ratio**. Over time, as customer-friendly knowledge is documented and maintained, and indirect support increases in popularity, the cases that do come in should be increasingly complex. In a perfect world, every known issue is self-solved by customers, so all cases raised are new problems. Accordingly, the ratio of new issues to known issues in assisted support should **increase**. This is easiest to measure when customer-facing staff close known issues by recording a link to the knowledgebase entry that describes the problem and its resolution. As the new vs. known ratio increases, note that first contact resolution will decrease and average handle time will increase. This shouldn’t be a cause for concern: it means support staff are spending their time on value-added activities, not just answering the same question over and over.
- **Time to publish**. How long does it take from the first time a new issue is solved until the resolution is available to customers? Service and support bellwethers publish their knowledge the same day the issue is resolved—literally, within minutes of the case being closed. Time to publish should **decrease towards zero**.

### Self-Service

- **Percentage starting with self-service**. For some issues, customers will try the self-help website first. Other times, they’ll reach immediately for the phone, or they’ll send an e-mail. While break-the-glass emergencies will inevitably send people running for the phone from time to time, the goal is to make the web self-service experience so compelling and attractive that it’s the first choice for most customers, most of the time. A good indicator of how customers perceive the value of self-service is the percentage of issues that start with self-service. So the percentage of issues that start with self-service should **increase**.
- **Estimated web success**. Of course, it’s not enough to attract customers to the web—they also need to be successful. Industry benchmarks put self-service rates on technical support websites at only around 50 percent—pretty good for a baseball slugger, but terrible for a resource that’s designed to resolve customer issues. <sup>iv</sup> Any measure of website success is only an estimate: we prefer phone surveys, but clickstream analysis can be very effective especially when calibrated by surveys. (Avoid extrapolating from a “did this article help?” feedback mechanism, as response rates are almost always too low to provide a representative sample of customers.) But however you estimate success rates, they should **increase**.
- **Estimated case deflection**. Not every successful self-service experience avoids a case. For consumer products where assisted support is difficult-to-reach or expensive, few website interactions would turn into a case. And our research suggests that typical self-service “escalation rates”—that is, the percentage of unsuccessful self-service interactions that result in cases—is less than 10 percent, even for enterprise products where customers have paid for support. Case deflection rates can be calculated as the percentage of customers who are unsuccessful at self-service, times the percentage who are entitled to escalate, times the percentage who actually do. Multiply by the number of web sessions to find the total number of cases estimated to be deflected. Case deflection should **increase**.

<sup>iii</sup> *The Best Service is No Service: How to Liberate Your Customers from Customer Service, Keep Them Happy, and Control Costs*. Bill Price and David Jaffe, 2008.

<sup>iv</sup> Benchmark data from the Service & Support Professionals Association (SSPA). See <http://www.thesspa.com/benchmarking>

## Emerging KPIs for Service and Support Continued

### Collaboration and Forums

- *Number of leaders.* All successful forums have leaders: individuals who contribute prolifically, bring definition to inchoate conversations, and develop reputations as people who should be listened to. The 90-9-1 rule of online communities was noted as early as 1998<sup>v</sup> —as a rule of thumb, of every 100 people who visit an online community, 90 will be lurkers, nine will contribute a bit, and most of the work will be done by just one of the hundred. Experience shows that it's hard to get above 1 percent of leaders, and it's often a struggle to get even that many. Some organizations formally recognize their leaders, which helps measure this indicator of collaboration health. The number of leaders should **increase** and approach at least 1 percent of participants.
- *Productive activity.* A rough-and-ready way of estimating trends in the value being created in forums is to track raw activity numbers: threads, posts, searches, views and registered users. Activity measures are a better indicator of benefit in support communities than inside the support center or contact center, because all activity is voluntary: users have little incentive to game the numbers. Better still is if you can estimate which activities generate value: for example, threads that are marked as “answered,” postings that are marked as “helpful,” or questions that are replied to within (for example) 48 hours. Productive activity should **increase**.
- *Estimated case deflection.* Analogous to case deflection estimates in self-service, survey data and clickstream analysis can allow organizations to estimate the number of support cases that are deflected or avoided as a result of discussions in the community. Note that the topics raised in communities aren't identical to those raised in self-service or in assisted contacts, so we would expect a lower escalation rate (and deflection rate) from communities than from self-service. Still, as long as it is estimated consistently, case deflection from communities should **increase**.

### Overall Customer Experience and Value

- *Customer loyalty.* The ultimate business of the service and support organization is customer loyalty, including referenceability and lifetime profitability. Loyalty is affected by many different parts of the organization, so support executives are sometimes reluctant to take credit (or responsibility) for it. But like it or not, support has a lead role in the post-sales customer experience, the part of the customer lifecycle that has the most profound impact on loyalty<sup>vi</sup>, so support should be measured on it. Ideally, if loyalty measures (such as Net Promoter Score) become embedded in cross-functional programs<sup>vii</sup>, it will help align service and support with product teams, professional services groups, marketing and sales, operations, and everyone else who can improve customer experience and value. Customer loyalty should **increase**.
- *Cost per exception.* Service and support organizations have long tracked cost per call or cost per contact. But in the new world of support, where most customer issues (or “exceptions”) are handled through indirect channels, it's more important to see how the whole support ecosystem is working. Cost per exception rewards service and support organizations for channeling demand out of the assisted model, even if that means that the more complex issues that are handled by people take more time and money to solve. Cost per exception should **decrease**.
- *Satisfied demand for support.* If customers find it too inconvenient to get their questions answered and their issues resolved, they will simply go without. In the best case, they'll struggle along, simply not getting the full value out of their purchase. Worst case, they'll give up and buy a competitor's product or service. In any case, if people are looking for service and support, they should get it: satisfied demand for support should **increase**.

Sources of metrics: Price and Jaffe; Case study presented by Bradford T. Smith, Symantec<sup>viii</sup>; The Consortium for Service Innovation<sup>ix</sup> and DB Kay & Associates.<sup>x</sup>

<sup>v</sup> *The Dynamics of Mass Interaction*, Proceedings of CSCW 98, the ACM Conference on Computer-Supported Cooperative Work (Seattle, WA, November 14-18, 1998), pp. 257-264. Whittaker, Terveen, Hill, and Cherny

<sup>vi</sup> Unpublished customer research, Shaun Smith, smith+co

<sup>vii</sup> *Silos, Politics and Turf Wars: A Leadership Fable About Destroying the Barriers*. Patrick Lencioni, 2006.

<sup>viii</sup> Presented by Smith to the Consortium for Service Innovation Executive Summit, April 2009; available to Consortium members through the member collaboration space

<sup>ix</sup> *A Demand-Based View of Support: From the Funnel to the Cloud, Version 1.5*, Ann M. Marcus; *KCS Measurement Matters: The Benefits and Organizational Measures of Knowledge-Centered Support*, Bohl, George, B. Kay, D. Kay, Oxtton, and Roberts. Both documents are available from the Consortium website at [www.serviceinnovation.org](http://www.serviceinnovation.org)

<sup>xi</sup> Unpublished research; see also *Collective Wisdom: Transforming Support with Knowledge*, Françoise Tourniaire and David Kay, 2006

## Legacy Technology Can't Keep Up

Many of the tools we see being used in service and support centers were built for a very different world than the one we're describing in this paper. When we discuss emerging customer-centric KPIs like the ones above with our industry colleagues, the response we get most often is, "but we can't measure that!" Using technology built simply for solving one case after another will never let support leaders measure the important KPIs—let alone improve them.

More than any one feature or function, what legacy tools get wrong is the mindset. For example:

- **No big-picture perspective.** Traditional CRM systems track assisted cases, but have absolutely no record of the bulk of service and support interactions that happen in self-service, forums and throughout the ecosystem. Search engines and most knowledge management applications are little help. Understanding the customer experience by tracking only cases is like understanding a symphony by listening to only the bassoon parts—the notes are correct, but the essence is lost.

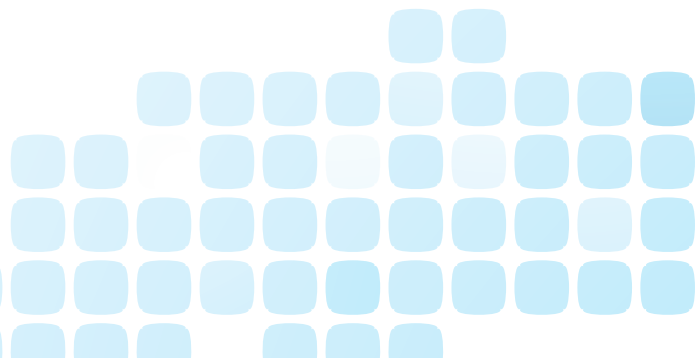
- **No support for collaboration.** Traditional support tools handle cases as though they were widgets on an assembly line, moving on a rigid conveyor belt from one station to the next. For example, if a front-line staff member can't resolve a customer issue in a certain amount of time, he will escalate to a more senior or technical person, who might in turn have to escalate to someone else. This is terrible for customers, who are made to feel like they're being made to run the gauntlet for their vendor's convenience. Escalation is a huge cost driver, too.

Conveyor belts may be fine for factories, but collaboration is better for knowledge work. Allowing customer-facing staff to work efficiently with their colleagues on an as-needed basis to resolve issues is more efficient, and better for customers. Best of all, tools that support collaboration with subject experts are in a perfect position to capture knowledge for reuse.

- **Not designed for knowledge-intensive resolutions.** To continue the assembly line analogy, too many tools treat customer-facing staff like factory workers, torquing the same nut on the same bolt again and again. They monitor compliance: talk time, service levels, scripts, escalation triggers and the like. But when customers call for help, they don't want scripts and machine-like behavior; they want knowledgeable, helpful, authentic people who listen closely and then solve the problem. The world is growing more complex, and with effective indirect support, assisted cases are growing exponentially more complex. Too often, tool vendors have put much more thought into how to enforce policy rather than providing the knowledge and functionality to help users do their real job—helping customers.

- **Disconnect process and knowledge.** Service organizations selecting tools have faced one of two unappealing options: use the lightweight knowledgebase module provided by their CRM vendor, or buy a best-of-breed knowledgebase tool. The knowledgebases provided by CRM vendors are not very useful: usually a database table for content, simple search for that content, authoring screens and approval workflow. Often they suffer from severe real-world usability issues like an inability to preserve text formatting, arbitrary character limits and random-seeming search results. It's no surprise that these products aren't very strong; they're built as something of an afterthought, and great knowledgebases require sophisticated technology far removed from the core competency of the CRM vendor. On the other hand, best-of-breed knowledgebases have their own issues: they aren't integrated with case tracking out of the box, so getting full use of their capabilities requires surprisingly costly integration services. Often times the cost of effective integration is so daunting that buyers live with disconnected systems, leaving their hapless staff to toggle screens, cut, copy and paste between applications. This means there is no effective integration of process (CRM) and knowledge (KB).

- **No holistic, integrated view of the customer.** Much of the time the applications available to the support agent give a good view of the back-end systems and provide him with knowledgebase examples that may help, but they give him no information regarding the state of the customer's computer. This is a little like putting a blindfold on a surgeon and asking him to operate on a patient with only the patient's guidance to help him. The problem is compounded by the fact that the support agent undoubtedly has half a dozen applications that present him information that he somehow has to coalesce and process to make some sense of. The end result is that the support agent spends an inordinate amount of time simply trying to understand the customer's problem and reconcile it with the information from multiple interfaces; a very inefficient process.



## What's Needed: A New Generation of Tooling

Times have changed—legacy tools haven't. Rather than tweaking an existing tool for purposes for which it was never built, smart executives are looking for a fresh start that can position them quickly to deliver new models for service and support.

**Tools must manage all support interactions, direct or indirect.** New tools need to track and optimize all customer interactions whether implemented over the phone, through a web service request, chat, self-service, community forums, or even SMS. Simply tracking calls isn't enough. And, providing customers a different set of tools from customer-facing staff is asking for disconnects and missteps. Tools must provide:

- A single set of reports and measures on the customer experience through all channels.
- A way of guiding customers seamlessly between channels—for example, returning relevant answered questions from forums in self-service search, or transforming an unsuccessful self-service session into a case.
- A single mechanism for applying business rules, policies, preferences and segmentation across all customer touchpoints.

**Tools must report on emerging KPIs.** We see reporting specialists performing the Herculean task\* of trying to make sense of the customer experience across every support interaction—proactive, assisted, self-service or community—with data extracts, custom data marts, Excel macros and lots of manual work. Often, especially when budgets are tight, organizations can't afford the labor required to calculate transformational metrics like the emerging KPIs we discussed. The result is that each silo uses whatever reporting it can—CRM reports, search logs, community traffic reports—but there's no coordination or insight across the channels. From the perspective of the new support models, organizations end up flying blind. It's true: you can't manage what you can't measure, and you certainly can't improve it.

**Tools must scale to today's complexity.** Consumer products and business-to-business solutions alike have become increasingly complex through a profusion of features, interfaces, customization options and all the other products with which they work. As the old engineering dictum states, "the easy things should be easy, and the hard things should be possible." Simple keyword search simply won't help users with complex problems navigate to one of tens of thousands (or hundreds of thousands) of documents scattered through the knowledgebase, forums postings, FAQs, references, manuals and all the other sources of knowledge that can help. Systems must provide advanced tools like:

- search that intelligently guides users to narrow their focus
- "best bets"
- search results tuning
- browse
- downloadable fixes, and
- process wizards for specific high-value customer situations.

**Tools must enable industry best practices.** Tool vendors often claim that their products are "agnostic" about how they're used, as if that were a good thing. But through industry efforts and knowledge sharing, it has become clear that some ways of troubleshooting and managing cases, communities and knowledge are simply more effective than others. When vendors are asked, "How should we use this tool," they should have a better answer than, "How do you want to use it?" In particular, tools should be KCS Verified to enable Knowledge-Centered Support (KCS<sup>sm</sup>).<sup>xi</sup>

<sup>xi</sup> For more information on KCS and the KCS Verified program, see the Consortium for Service Innovation's website at [serviceinnovation.org](http://serviceinnovation.org).

\* Given what comes out of many reporting tools, we suspect "cleaning the Augean Stables" is the best match.



Tools must integrate knowledge and process at every touchpoint. Capturing, improving and especially reusing knowledge must be part of every customer interaction—whether direct or indirect. Accordingly, knowledge management and case tracking capabilities must be deeply integrated. For example,

- The case tracking system should start a search automatically based on the customer’s problem description.
- Information provided by the customer in an unsuccessful self-service session should be automatically added to the case, should the customer choose to open one.
- Cases opened online should furnish the customer with knowledge and a guided search experience while he/she is waiting for a response—with luck, they’ll be able to close their own cases.
- Cases should record all knowledge reused in the course of resolution.
- Highly useful community interactions should migrate to become knowledgebase articles.
- The online customer experience should be tailored based on everything known about the customer and her preferences.
- Authorized support staff using knowledge should be able to easily flag or improve it, based on the things they learn while they’re working on the customer issue.
- Information captured in the course of resolving the case should, in addition to becoming case notes, be candidate data for creating a new reusable knowledge article.

With regard to the last two points, Consona has combined the concepts of Knowledge-Centered Support and the integration of knowledge and process into a solution called Consona Knowledge Driven Support (KDS). KDS is a realization of the principles of Knowledge-Centered Support in an integrated suite of best-of-breed case tracking and knowledge management applications.

**Tools must provide a holistic view of the customer.** As broadband products fully penetrate late majority and laggard markets, it is no longer sufficient to only have a “back-end systems and network” view of a customer’s products. Customer support agents need to be able to understand a customer’s problem by seeing what the customer sees. This means having a detailed view of the customer’s home network and connected equipment

whether that’s a PC, PDA, phone, gaming console or digital photo frame. The onus should be on the support organization to understand the customer’s problem, not on the customer to adequately explain and debug their problem.

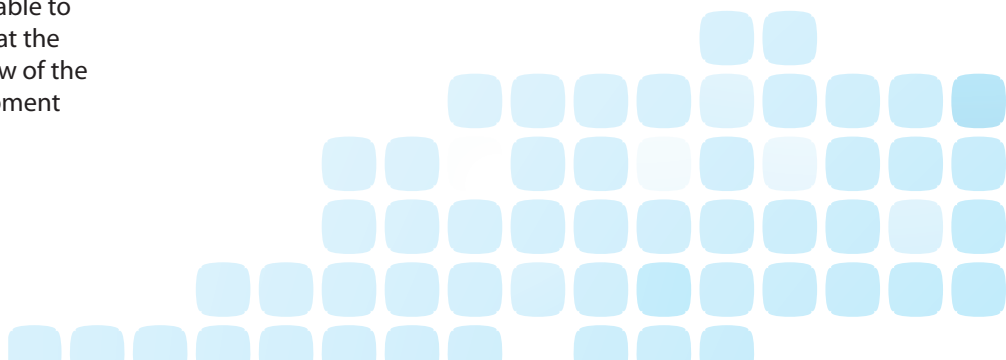
This requires home network resident tools that can help a support agent understand a customer problem and preferably fix the problem using automated methods that reduce handling time. The ideal situation is for these home network resident agents to proactively detect and fix problems before a customer ever has to phone the support center, but this is not going to be possible in the majority of cases.

For such a system to be fully utilized, the information it provides to a support agent has to be fully integrated into an aggregate support agent interface. This should be simply structured such that it presents the agent with the right information from all the relevant systems in the right order of priority. The aim here is to give the support agent the right information at the right time and enable her to rapidly help the customer without having to struggle with complex disparate systems. Consona has an integrated tool suite that can provide exactly this functionality tightly integrated with both case and knowledge management for even further efficiencies.

## The Business Case for Replacing Legacy Tools

To circle back to where we started, what does this all mean? After all the money and sweat equity organizations have put into their legacy tools, why should they start fresh now? What’s so compelling about the new models for service and support?

**Dramatically lower cost through indirect channels.** It all starts with spending money to save money. Without an infrastructure that makes web self-service and support forums the most attractive way for customers to get help most of the time, organizations will pay people to answer the same question over and over again. This frustrates customers, bores support professionals, and wastes money.



We read and hear lots of advice about how to drive people to indirect channels: reduced options for free support, links from inside the product to self-service, education by customer-facing staff, PR campaigns, and even “holdvertisements” for unfortunate customers stuck in the phone queue. These methods are not necessarily in poor taste, but none of them will create lasting behavior change unless they’re followed up with a service experience that customers will willingly choose over assisted support. Without the right technology, it’s hard or impossible to create an automated “wow” experience. So the right tools—in conjunction with the right business processes—help save money by moving a significant volume of customers from direct to indirect channels.

For example, Consona’s customer CQ University of Central Queensland, Australia, captures knowledge during assisted customer service interactions in order to publish them on the web for self-help. They also carefully assess Consona analytics to identify and fill knowledge gaps. CQ University reports that combining these knowledge practices with Consona’s innovative self-service technology has resulted in a contact deflection rate of 70 percent.

### **Measure and manage the entire support experience.**

Before enterprises can create a compelling indirect customer experience, they need to be able to measure it, using the kinds of emerging KPIs discussed earlier in this paper. Since traditional tools are focused only on assisted support—at best, lumped in with a separate silo of clickstream data from the self-service site—they cannot provide insight into the total support experience.

The whole support experience matters not just because great indirect experiences deflect costly contacts. It also matters because without a view of the whole support experience, executives can’t assess their impact on customer loyalty, customer lifetime value, and their other key business outcomes. Support exists to make customers successful. By measuring the much-more-frequent indirect interactions along with the traditional assisted cases, support organizations can maximize the total value they generate for customers—and for their shareholders.

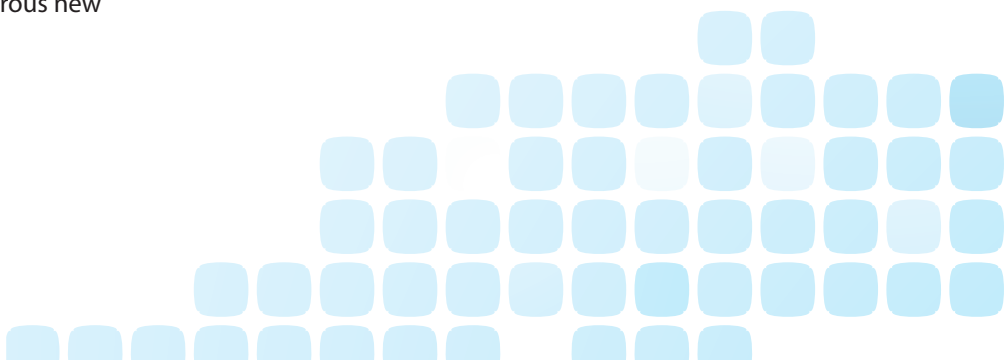
QLogic, a leading provider of storage networking solutions, retooled their support operations with Consona for just this reason. Since Consona provides an integrated solution for support agents, customer self-service, and support forums, QLogic is able to service customers consistently through direct and indirect channels, maintaining flat headcount even as two corporate acquisitions added numerous new products and customers to the mix.

**Avoid throwing good money after bad.** In many of the service and support centers we visit, the technology is a dog’s breakfast of customizations, patches, glue code, and supposedly short-term fixes that remain in place for years. Upgrading to a current version becomes nearly impossible because of all the custom code that would have to be migrated and adapted to new APIs and architectures. In some cases, support is costly or even unavailable because the heavily-customized codebase is so hard to upgrade to a current version.

Sound familiar?

Service and support organizations create this snarl of technology with the best of intentions. The business continues to evolve. Vendor suites are often behind best practice when they’re first installed, and time only makes the problem worse. While IT organizations generally know the pickle they’re putting themselves in, the business demands customization because out-of-the-box functionality simply won’t support their needs. Pretty soon, it takes so much effort and resource to keep the system up and running, there’s nothing left for improvements.

When requirements change—as this paper argues they have—sometimes the best, cheapest thing is to start fresh with a new platform, designed for how business is really being done. We urge our readers to think carefully about their current situation and decide: *maybe it’s time to pull the ripcord.*



## About the Authors

David Kay

Principal, DB Kay & Associates

Since its founding in 2002, DB Kay & Associates has provided thought-leading consulting services to the customer service and support market. DB Kay customers include Cisco, Openwave, QUALCOMM, Research In Motion, TI, Tektronix, VeriSign, Sun, Alcatel-Lucent, Intuit, and IBM. DB Kay is the industry's leading independent provider of Knowledge-Centered Support workshops and consulting.

Its principal, David Kay, is a frequent speaker at industry events. He was recognized as an innovator by the Consortium for Service Innovation, and has been certified as a Knowledge-Centered Support trainer. He held leadership roles at an innovative knowledge management technology provider from 1998 through 2002, and has been granted six patents for knowledge management technology. Kay co-authored the first book on knowledge management for service and support, *Collective Wisdom: Transforming Support with Knowledge*, which is available on Amazon.com.

Tim Hines

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Tim Hines joined Consona in 2006 and serves as vice president of product management for Consona CRM. In this role, Hines guides the product roadmap and functionality across all of Consona CRM's product lines.

Hines has been involved in the CRM industry since 1995. He began his career at AOL as a tech support representative. He was a user and eventually manager of Vantive, Witness, and TCS. Hines also worked in Andersen Consulting's CRM internal practice, where he focused on Remedy. After leading implementation efforts with marketing automation vendors, he joined the Onyx product management team in 2002.

Hines holds a bachelor's of business administration in information technology from the University of Phoenix and a Master of Science degree in information technology from American Intercontinental University (AIU). He is currently working on a Ph.D. in information technology.

## Learn More

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[www.dbkay.com](http://www.dbkay.com)

Consona CRM

[www.consona.com/crm](http://www.consona.com/crm)

## About Consona

With a comprehensive set of solutions spanning self-service, customer management, chat, communities and proactive, just-in-time marketing and support—all fueled by a patented, best-of-breed knowledge management platform and backed by advanced analytics—Consona's KCS *Verified* tools are the choice for integrated, multi-channel customer service and support. The only CRM vendor focused entirely on service and support, Consona helps the Global 2000 control costs while providing a superior customer experience.

Consona

**Problem: Solved!**