

# Making Service and Support Your Revenue Engine: The Initiative That's Too Important to Delay

A Consona CRM White Paper

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## Executive Summary

*Why do we do service and support?*

This seems like a simple question with an obvious answer. But as we travel around the world talking with our colleagues in front-line, leadership, and executive roles, we find that the answer isn't as obvious as it first appears. In fact, a surprising number of support professionals can't clearly articulate the value they bring to the business.

The value of service and support is hidden in a fog of metrics—measures that festoon monitors and bulletin boards, populate binders, fascinate managers, bedevil employees, and ultimately mislead us about the business. The measures are misleading because they show what's happening inside support, but the value of support is what it does outside support. Certainly backlog, service levels, hold times, and cases closed are important, but **the real value of support is the revenue it protects and creates.**

Some support organizations create direct revenue and margin in the form of maintenance contracts and other direct fees. But more importantly, support unlocks revenue from the core product and service business. Support, every bit as much as sales, creates revenue.

Service and support makes customers successful, which in turn:

- Makes the company's offerings more valuable to customers
- Increases product use and adoption
- Drives loyalty, referenceability, retention, and repurchase

In short, support sustains and grows the business.

There are many channels to drive customer success, including the contact center and support center, web self-help, automated problem detection, and support communities. The key enabler of all of these techniques is knowledge, gathered, applied, maintained, integrated with business process, and improved with every customer interaction. Knowledge helps support professionals as they help customers, enables customers to help themselves, and helps customers help each other.

For too long, CRM or case tracking systems were the primary tools for support professionals, while knowledge management was an afterthought. But what's needed to unlock the power of service and support is a new kind of technology that tightly integrates case tracking with knowledge into a seamless whole, using knowledge to improve the resolution of every customer case.

The purpose of this paper is to convince you of the astonishing power of service and support to drive the business, and to explain what's needed to make that happen.

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"Customer loyalty is a significant determinant of sales growth... The magnitude of this effect is substantial: at the mean, a one standard deviation increase in loyalty implies a corresponding 0.36 standard deviations increase in quarterly sales. [...] We estimate that a one standard deviation increase in customer loyalty... would translate to \$500 million in increased sales."

*Determinants of Customer Loyalty and Financial Performance*, Rodney Smith and William Wright, *Journal of Management Accounting Research*

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## Challenging the Conventional Wisdom About Service and Support

Almost every part of the enterprise has changed dramatically in recent years. The Internet has redefined marketing, tightened complex supply chains, and moved the showroom into the living room. Automation has streamlined factory operations. Information technology has given CEOs and their managers access to real-time operational data in unprecedented detail. Conventional wisdom has been upended as modern process and technology improvements revolutionize all aspects of business.

Yet, in support, the conventional wisdom too often goes unchallenged. Obsolete beliefs make it harder to focus support on customer success and revenue. As an industry, we first need to confront and overturn two unhelpful ideas.

### Bad Idea One: Support is a Cost Center

"Support is a necessary evil as long as our products aren't perfect." In this view, support is an inevitable but unproductive cost of doing business, much like the electricity bill, and the only rational plan is to do support as cheaply as possible. This bad idea has been a driving force behind offshoring and outsourcing to low-cost providers of dubious quality, a trend that is rightly on the wane.

Discouragingly enough, we hear this myth frequently from support professionals themselves. If we believed this ourselves, we wouldn't be very excited about coming in to work in the morning! Fortunately, it's not nearly the whole truth.

Products do have bugs, and glitches do generate calls to the support contact center. But we have had the opportunity of looking inside many case tracking systems, and without exception, product defects are a minority of calls—often, a small minority. More frequently, the product or service is working as designed, but the customer can't figure it out. Whether that's the fault of the product or the user in any given situation is moot: either way, the customer needs help unlocking the value from the product, and support is where they're going to get that help—or not.

We should be clear: support executives who don't control their costs won't keep their jobs, and nothing in this paper should imply that there are any blank checks being signed.

But managing costs is completely different from managing support as a cost center—as an activity with no upside.

It's a matter of focus. Users who don't get the value they expected from products won't buy again, and they won't recommend your product. They may even complain about it to their friends, colleagues, or thousands of blog readers. But customers who can quickly and easily overcome challenges become advocates and repurchasers. Product defects or no, support is an essential enabler of customer success and top-line growth.

### **Bad Idea Two: Support is a Profit Center**

"The goal of support is to maximize its direct profit contribution." This sounds like progress: as a profit center rather than a cost center, the support organization is now the CFO's best friend. And this is happening in the industry today: SSPA research shows that service and support organizations are contributing the majority of profits earned by technology companies.<sup>i</sup>

There is nothing wrong with managing support margins; if support holds a portfolio of valuable maintenance contracts, they should be profitable. The problem with the profit center model arises when a fixation on direct profits prevents leaders from seeing the bigger picture. In extreme forms, companies rely on the maintenance stream while ratcheting down on the value returned by support. The result of these short-sighted decisions is illustrated by the demise of Xerox in the copier market in the late 70s. A once-profitable support revenue stream collapsed when customers felt betrayed, leading them to defect to competitors who focused on quality, not just short-term profit from servicing balky copiers.<sup>ii</sup>

### **Underlying Misunderstanding: That Support is an Island**

Whether support is starved for resources as a cost center or squeezed for margin as a profit center, the underlying misapprehension is the same. Enterprises see support as a standalone function. As long as it stays on budget and customers aren't defecting en masse, senior executives rarely pay much attention to support.

Support executives often play into this mistake by reporting measures that have little meaning to the rest of the business—service levels, handle time, or c-sat.

As the next section shows, the reality is that support is not a standalone silo. Support is key to an overall business strategy

that focuses on the customer experience and customer loyalty. As such, support is the key enabler of the company's overall success.

#### **A Note on "Service and Support"**

This paper focuses on the value of effectively helping customers after an initial sale. In some industries, all post-sale customer interactions are called "service;" in other cases, service and support are separate. For example, handling a billing question or order status inquiry might be called "service," but answering a technical question about the same product would be called "support."

Using the phrase "service and support" throughout this paper would be awkward. We will use the terms "support," and "support organization," in this paper, asking our colleagues in service organizations to mentally search-and-replace.

*The bottom line: if you help customers be successful with your company's products and services, this paper is for you.*

### **Today's Reality: Service and Support are Marketing and Sales**

Most businesses are built on the implicit assumption that buyers, clustered into "markets," should be treated like fish: hook them with the right marketing message, land them with a solid sales pitch, and the revenue follows.

But customers aren't like fish. They're curious, active, and keenly interested in the value they're receiving for their investments—especially in tight economic times. They're increasingly well informed by professional review sites, blog postings, customer reviews, and product search bots. They know and care about the experiences that other customers are having, and they make their decisions accordingly.

The best marketing and sales tactics can't sell a product that just doesn't work—at least, not for long. By the same token, companies can't advertise their way around thousands of scathing reviews from other users who feel mistreated. The initial dissatisfaction may come from the core product or service, but the bile doesn't really flow until a bad support interaction. (Jeff Jarvis's original Dell Hell post, a classic example of how a single customer's bad experience can have enormous impact when it is amplified across the Internet, leading at least indirectly to Kevin Rollins's ouster as Dell CEO, sums it up perfectly: "I just got a new Dell laptop and paid a fortune for the four-year, in-home service. The machine is a lemon and the **service is a lie.**"<sup>iii</sup>)

<sup>i</sup> See, for example, *The Service 50* economic data released quarterly by The Professional Services Association (TPSA). See [http://www.tpsaonline.com/the\\_service\\_50.asp](http://www.tpsaonline.com/the_service_50.asp)

<sup>ii</sup> According to the Gale Group's corporate history of Xerox, in the late 70s the average Xerox photocopier broke down three times per month, helping to set the stage for the ascendance of lower-cost, higher quality alternatives from Japanese manufacturers like Ricoh and Canon. [International Directory of Company Histories](#), The Gale Group, Inc, 2006. See also the discussion of bad profit in [The Ultimate Question: Driving Good Profits and True Growth](#), Fred Reichheld, 2006.

<sup>iii</sup> "Dell Hell" is the name of a series of posts written by Jeff Jarvis in his [BuzzMachine](#) blog: <http://www.buzzmachine.com>. The quotes come from the entry dated June 21, 2005. In fairness to Dell, they have consulted with Jarvis and are in many ways a model for excellent customer engagement today. See, for example, Jarvis' column [Dell Learns to Listen](#), *Business Week*, October 17, 2007.

In a recent Forrester study, the difference between a good customer experience and a bad customer experience was \$242 million dollars of revenue.

Bruce D. Tempkin et al., *The Business Impact of Customer Experience*, Forrester Research

### The Brand is Created Through Interactions

Organizations are starting to pay more attention to their customers' overall experience in selecting, buying and using products. Forrester Research has a practice dedicated to the analysis and improvement of the customer experience<sup>iv</sup>, and customer experience initiatives are flourishing within enterprises.<sup>v</sup>

Why the sudden interest in the customer experience, especially the post-sales customer experience? Customer experience is receiving attention because brands are created through interactions, and that the majority of interactions (and nearly all the really challenging ones) happen after the sale, once the customer is using the product or service.

Marketing organizations once created their brand through catchy tag lines and iconic logos. But those days are passed, replaced by a kind of branding that is implemented one customer experience at a time. Organizations need to intentionally tune every customer interaction so it drives and reinforces the brand. As the catchphrase goes, "the brand isn't what you say—it's what your customers say." Marketing expert Regis McKenna notes, "For marketers, the end goal changes from creating brand awareness **to satisfying customers.**"<sup>vi</sup>

McKenna and his marketing colleagues may be surprised to learn that there is already an organization dedicated to satisfying customers. Service and support is the new marketing.

### From One-Time to Recurring: Retention is the Key

Businesses have always tried to establish long-term repeat customers—giving away the razors to sell the blades is a very old tactic. But the shift from transactions to relationships is speeding up. Software licenses are replaced with software-as-a-service; Netflix charges not for individual video rentals but for a bottomless queue; cellular providers charge less for minutes and more for rich monthly service plans; and drivers increasingly lease their cars rather than buy them outright.

From the seller's perspective, this model has significant benefits. Compared to individual deals, ongoing relationships

offer smoother revenue flows and increased predictability. But there's a catch: to keep the revenue flowing, sellers must keep their customers happy. Unhappy customers can easily replace one relationship with another. Customer churn spells financial disaster.

Every problem and every service interaction is an opportunity to delight a customer and to sustain a profitable relationship. But it also can be an opportunity to frustrate, alienate, or simply overwhelm a customer, opening the possibility that they will defect to a competitor.

Customer retention is the key to revenue and profit in recurring businesses. Support must be efficient—the CFO needs to sign off on the budget—but it also must be effective. Effective service and support means never giving customers a reason to think about switching. With the goal of insuring that the monthly checks keep coming, service and support are the new sales.

### Loyalty is the Best Predictor of Profitability

Rigorous data analysis by Frederick Reichheld at Bain proves this unsurprising conclusion: profitable companies have loyal customers.<sup>vii</sup> CEOs across industries are embracing Net Promoter,<sup>viii</sup> a simple way of assessing and acting on customer loyalty.

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"Acquiring a new customer can cost 6 to 7 times more than retaining an existing customer. Businesses who boosted customer retention rates by as little as 5% increased their profits from 5% to a whopping 95%."

Frederick Reichheld, Bain & Company, quoted by J.B. Wood, CEO of SSPA

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There's no one organization responsible for customer loyalty: marketing and sales have to set reasonable expectations, and the product or service needs to actually deliver. But in many organizations, the real key to loyalty is service and support.

Consider the Ritz-Carlton hotel chain, famous for its service and the fanatical loyalty of its customers. Any nice hotel will satisfy customers by providing a clean, pleasant room and responding to requests. But Ritz-Carlton trains all of its employees to be alert for customers' unexpressed desires—in effect, to provide surprisingly good service. Staff members are encouraged to tell "wow stories"—times when they went well beyond reasonable expectations to delight a customer.<sup>ix</sup>

<sup>iv</sup> <http://www.forrester.com/> or <http://www.forrester.com/rb/search/results.jsp?N=70170>

<sup>v</sup> *Obstacles To Customer Experience Success, 2009*, Forrester Research, Bruce Temkin with William Chu, Steven Geller, and Angela Beckers, February 20, 2009

<sup>vi</sup> *Total Access*, Regis McKenna, 2002

<sup>vii</sup> *The Loyalty Effect: The Hidden Force Behind Growth, Profits, and Lasting Value*, Fred Reichheld, 2001

<sup>viii</sup> *The Ultimate Question: Driving Good Profits and True Growth*, Fred Reichheld, 2006. See also <http://www.netpromoter.com> While academics pick at specific aspects of the Net Promoter methodology (see *A Longitudinal Examination of Net Promoter and Firm Revenue Growth*, *Journal of Marketing*, Timothy Keiningham, Bruce Cool, Tor Wallin Andreassen, Lerzan Aksoy, July 2007), loyalty measurement programs are a staple of executive best practice.

<sup>ix</sup> *How Ritz-Carlton Maintains its Mystique*, *Business Week*, Carmine Gallo, February 13, 2007

The wow factor doesn't come from how much money is spent; it comes from the thoughtfulness and creativity of the staff. Ritz customers aren't loyal because the rooms are nice; they're loyal because they're cared for. They're wowed.

Whether your business is in a service industry like the Ritz-Carlton, or in a product business with a service component, service and support organizations are in the best position to wow customers, drive loyalty, and create profitable revenue. Service and support has to move from just answering customer questions to wowing customers. Service and support are the new marketing and sales.

### Five Steps to Driving Profit From Support

How do we unlock the revenue potential of service and support? Here are five actions to take.

#### Send the Right Message

When you're in the trenches of a support contact center, it seems that all you can see is the next call waiting in the queue. It's hard to lift your head up long enough to think about strategy, or loyalty, or creating "wow moments" for customers. This is especially true for front-line managers who are focused on service levels, backlog, and other operational metrics.

Leaders need to take the time to remind everyone that they're in the customer success business, and that means more than moving on to the next case. It means making the effort to create or improve knowledge to solve the same issue more effectively next time, or allowing customers to help themselves online. It means actively listening to customers in order to address the causes of their problems—not just the symptoms. And—sometimes—it means thinking creatively about how to go beyond contractual obligations to create an above-and-beyond experience for customers.

Managers will manage to the numbers. Leaders will create an atmosphere where every staff member seeks to create loyalty-building customer experiences.

#### Measure the Right Things

As an industry, we love our metrics. Contact distribution and tracking systems provide a cornucopia of measurements with satisfyingly high detail and precision. But support sometimes misses the forest for the trees: do abandonment and first contact resolution statistics really reflect the impact support has on the business?

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"Of all customers recently surveyed by ServiceXRG, 47% indicated that service excellence keeps them loyal to technology vendors."

*ServiceXRG, Leveraging Service Excellence to Develop Customer Loyalty*

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Make sure your measurement dashboards go beyond the standard support metrics to capture the customer experience and its effect on revenue and profit:

- Net Promoter Score and other loyalty measures
- Web site effectiveness
- Satisfaction with transactions, web experiences, and the relationship
- New product, service, or version adoption rates
- Renewal rates and repurchase rates <sup>x</sup>

Support executives sometimes tell us that these measures are imperfect and imprecise, and that's true. But measuring things precisely isn't nearly as important as measuring the right things. <sup>xi</sup> Another common objection is that service and support can't take sole credit (or blame) for customer loyalty, and that's true, too. But that's actually a good thing: as Patrick Lencioni points out, cross-functional metrics are a great way to align organizations. <sup>xii</sup> Do you want a product organization to pay attention to your requests to fix their pieces of the customer experience? Make Net Promoter Score a cross-functional objective, and you'll share an incentive to do the right thing.

Also, make sure that the key support metrics explicitly tie in to overall business objectives. Organizations that use the Balanced Scorecard methodology should select measures for their service and support scorecard that cascade down from the corporate scorecard. <sup>xiii</sup>

#### Help Customers Help Themselves

Service and support organizations sometimes think of self-help options as being second best. This thought is implied in the phrase "call deflection," which makes it sound like Machiavellian support executives are trying to substitute self-help for what customers really want.

In fact, most of the time, most customers would prefer to handle things themselves, thank you very much. If issues arise, and if they can be painlessly handled with automation, why take the time and effort to work through a human? (How many people still stand in line for a bank teller to make a simple cash withdrawal?)

<sup>x</sup> For a fuller treatment of support metrics, especially the elusive self-service success and deflection metrics, see *Collective Wisdom: Transforming Support with Knowledge*, Françoise Tourniaire and David Kay, 2006

<sup>xi</sup> *Transforming Performance Measurement: Rethinking the Way We Measure and Drive Organizational Success*, Dean Spitzer, 2007

<sup>xii</sup> *Silos, Politics, and Turf Wars: A Leadership Fable About Destroying the Barriers that Turn Colleagues into Competitors*, Patrick Lencioni, 2006

<sup>xiii</sup> *The Balanced Scorecard: Translating Strategy into Action*, Robert Kaplan and David Norton, 1996; see also *A Balanced Scorecard for Customer Support: Building the Business Case for Problem Resolution*, David Kay, 2003, available at <http://www.dbkay.com/content/bscPaper.pdf>

Demographics are on self-help's side, too, with upcoming generations that can't imagine life without networked computers and phones, having grown up with immediate automated access to information, commerce, and self-service.

Not only do customers prefer self-service in many cases, but self-service also enables delivery of far more service. For many of our customers, a revamped self-service web site not only increases call deflection, but it also services over ten times as many service requests as does the support contact center. In other words, there was a vast demand for support that wasn't visible until it was fulfilled by effective automated channels.

For every person who used to be helped by an employee, support organizations are now also helping ten others through the web—ten others who might have been frustrated or unsuccessful with their purchases without web self-help. Fulfilling this invisible demand for support can only increase customer loyalty and lifetime customer profitability.

### **Empower Customers to Help Each Other**

Communities and forums are emerging as a primary way of delivering help and support, especially for products and services about which customers are passionate: games, computer systems, wireless phones, financial services, hotels, airline frequent-flyer programs, and the like. These customers have tremendous expertise on how things work in their world—in the real world—and their enthusiasm, coupled with a desire for recognition, makes them willing to help their fellow enthusiasts without financial reward.

It goes against intuition that forums would increase loyalty—after all, they sometimes have no direct affiliation with the company and, even if they do, the company usually participates with a light hand, leaving most of the work to others.

But in fact, customers' hearts follow their words and actions. By investing time in building a reputation on forums associated with a product or service, and by publicly discussing, debating, and ultimately defending the brand, customers affiliate themselves emotionally with it in a way that marketers and advertising agencies could only dream of.<sup>xiv</sup>

### **Gain and Use Knowledge at Every Customer Touch**

Perhaps the biggest opportunity to drive profitability in the support contact center is to learn something with every customer interaction. Support organizations that are continually learning will deliver better service. They'll also strengthen customer bonds by turning a series of disconnected transactions into a relationship. Each time we talk with a customer, it's an opportunity to learn and improve—not only individually, but also collectively.

Think about what happens today. When customers ask for help, support professionals learn all kinds of useful facts: what the customer is doing, what problems they're having, and what they need and, in some cases, how to handle a new issue or problem. Then, after the case is closed, what happens to that knowledge? For all intents and purposes, it's lost completely.

Best practice is to document the transaction in a case tracking or incident tracking system. Perhaps, in theory, someone could review all the case notes for all the cases a customer has opened prior to handling his or her next call. But, in reality, case tracking systems are "write-only." The data inside isn't structured or organized to be easily used, making it as ineffective as a file folder that has been moved to offsite storage—theoretically retrievable, but, as a practical matter, gone forever.

Our collective amnesia about discoveries we make while delivering support erodes loyalty, slows problem resolution, and silences the voice of the customer.

New best practices for support organizations, especially Knowledge-Centered Support (KCS<sup>SM</sup>), can complement case tracking by capturing, improving, and reusing knowledge with every customer contact.<sup>xv</sup> KCS knowledge is structured for reuse, making it easy to retrieve and apply. KCS creates a repository of the collective learning of the service and support organization—perhaps not perfect, and never complete, but representing the best of what the entire organization has learned in a way that can be easily reused and updated.

By sharing our knowledge, we:

- Avoid re-solving known issues, increasing support contact center efficiency
- Inform each support professional with the experience of the entire team
- Rigorously track customer issues to drive product and service improvements
- Provide a customer-centered solution set to enable effective self-help

<sup>xiv</sup> Groundswell: Winning in a World Transformed by Social Technologies, Charlene Li and Josh Bernoff, 2008

<sup>xv</sup> For more information on KCS, see the website of the Consortium for Service Innovation: [www.serviceinnovation.org](http://www.serviceinnovation.org)

We fundamentally change support from a reactive organization to a learning organization, an organization that assumes its rightful place as the customer expert, the customer advocate, and the chief driver of loyalty and profit.

### Laying the Technology Groundwork

It sounds simple enough: send the right message, measure the right things, help customers help themselves and each other, and gain knowledge at every touch. But we've seen a distressing number of initiatives fail only because the technology got in the way of good intentions. If tools make it too hard to do the right thing, then the wrong things will happen instead.

### Integrating Knowledge with Cases

As we spend time in support centers, we see one common technology barrier emerge: it takes too many clicks, tabs, mouse movements, and application switches to get the job done. For every second spent reading or entering valuable information, it seems we have to spend ten seconds sorting through various fields, tabs, and windows. Add to this wasted effort the network delays that often come with worldwide application deployments, and a staffer's blood pressure skyrockets as he repeatedly asks customers to wait for their applications to catch up. As the KCS Practices Guide<sup>xvi</sup> notes, "applications must function at the speed of conversation." Most don't.

While individual applications can be awkward to use, that's not the biggest problem. In many cases, support professionals must use a myriad of applications for different purposes. And switching among these applications can be a nightmare. Especially if you're trying to capture, improve, and reuse knowledge in every customer interaction, the gulf between case tracking and knowledge management can be insurmountable. As the KCS Practices Guide further advises, "Sustainability of the KCS practices requires that users see continuous improvement in the level of integration."

When considering solutions to enable loyalty-building processes, consider how they support the following tasks.

### Integrated Knowledge Capture

Support professionals take case notes throughout the resolution process. Why should they have to retype their knowledge into a separate knowledgebase screen after they're done? Not only is it much less efficient to add a separate knowledge authoring task at the end of the case workflow, it's simply less likely to get done, given human nature—people are likely to move on to the next problem in the queue. And even if a support professional tries to write

a knowledgebase article at the end of the case, it's unlikely she'll be able to remember all the details. It's much better to capture the relevant information on the fly, and to do just a little clean up at the end if needed.

The ideal tool would make authoring case notes and capturing structured knowledge a single streamlined activity, driven by business process rules. Customer-specific notes ("Bob needs a status update before his meeting at noon") could be entered in one part of the screen, while reusable knowledge could be entered in another. There's no duplicate entry, no cutting and pasting, no forgetting how the customer initially described the problem ... it's all done as the case progresses.

### Real-Time Knowledge Maintenance

The hardest part of knowledge management is keeping the information up-to-date. The best, most efficient way to make sure knowledge stays fresh is to require and enable knowledgeable users to fix, edit, or update it on the fly—or at least, to mark and annotate the knowledge with recommendations on the changes someone else should make. It's this principle that makes Wikipedia the most current general knowledge source ever, with near real-time updates on people and current events.

Unfortunately, many tools assume that knowledge maintenance is in the hands of a privileged few, so they require many steps to get from reading a solution to editing it—for example, launching another authoring tool, cutting and pasting the article ID in it, launching an editing workflow, and so on.

The ideal tool makes it just as simple for an entitled user to update the knowledgebase as it is to print it—it should take no more than a single click to get to the point where you're making your fix, and then no more than a single click to save the knowledge and send it on its way to other users.

### Seamless Knowledge Reuse

Of course, there's little benefit in capturing and maintaining knowledge if it can't be easily put to use in the problem resolution process. It has to be very easy for users to reuse and link content. Requiring them to retype customer issues, tab to separate search results windows, and copy IDs or URLs into the case puts too many barriers in the way of knowledge reuse. It's also important to track and report on the reuse of knowledge in closing cases: how often cases are closed using knowledge, which documents have closed the most cases, or which authors' content is being reused most frequently.

<sup>xvi</sup> KCS SM Version 4.1: Knowledge-Centered Support Practices Guide, Melissa George, Barbara Kay, Greg Oxtan, Consortium for Service Innovation, 2006. Available at [http://serviceinnovation.org/included/docs/kcs\\_practicesguide.pdf](http://serviceinnovation.org/included/docs/kcs_practicesguide.pdf)

The ideal system will:

- Launch searches from customer-provided problem descriptions in the case
- Allow searches to be easily refined, including drill-down on specific topics
- Search across the knowledgebase and other relevant content repositories
- Return results within the case tracking screen
- Allow one-click linking from the case to the knowledgebase solution
- Populate the case record with the linked knowledgebase content
- Track and report on knowledge reuse

In other words, knowledge search and reuse should be fully integrated into the process of working and documenting a case.

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“The role of the technology is to support the delivery of the experience. Every touch in the contact centre, whether inbound or outbound, represents a unique and immediate opportunity to extend and strengthen a customer relationship. Each interaction ... requires that your agents be prepared to respond quickly to the unique demands of the individual customer. Contact centre agents need the best decision support available so that they are free to focus on the customer experience.”

Shaun Smith, Senior Partner, smith+co, *Customer Experience Management, the Next Frontier for Contact Centres*, Cincom

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### Creating the Right Customer Experience

After the integrating knowledge with case management, the most difficult challenge support organizations face is how to leverage their knowledge to deliver a “wow” customer experience.

#### *Customer-focused Knowledge and Process Delivery*

Helping users help themselves requires not only great knowledge and tools, but also great ways to deliver them.

Users don't come to service and support sites to “surf” or “check us out on the web.” They come because they have a problem or a task. The web site needs to help them accomplish their task as quickly, efficiently and confidently as possible.

When people think about customer self-service, they often think about the search box and search results. Those are important, but a real customer-focused experience includes much more. The right tool will provide:

- **Search designed for service and support scenarios**, where people may know how to say what's wrong, but not how to fix it
- **Automatically generated options** for drilling down within search results, making sure that there are no dead ends
- **One-stop-shopping** for knowledgebase and all other relevant content
- **Push content** to include popular, new, and high-priority content
- **Subscriptions** and easy ways to bookmark and share content
- **Escalation**: The ability to open a new case when self-service isn't working, passing along the entire self-service experience (queries issued, documents opened, etc.)
- **De-escalation**: The ability to automatically provide self-service content in the course of opening a case online, providing immediate assistance to customers and deflecting cases from the support contact center
- **Self-service process management** that guides users to the transactional tools that will help them accomplish their customer service goals, such as resetting a password, configuring a product, or signing up for a new service offering

#### *Community-Based Support*

Passionate customers are willing to do support for free, but you have to make it easy for them. And, the support community needs to be part of the overall support site experience, otherwise too few people will benefit. Support communities flourish when they are managed skillfully and with restraint, and when the technology:

- **Integrates community content** with knowledgebase content
- **Makes it easy to repurpose community discussions** in the knowledgebase
- **Lets people track which questions are answered** and which are still open
- **Allows entitled users to escalate** unanswered questions to support
- **Tracks reputation and ratings** to incent and reward the right behaviors

## Conclusion:

### Customer Focus + Enabling Technology = Revenue + Profit

The choice for support executives is simple. Do you want to be managed down as a cost center or squeezed as a direct profit center? Or do you want to take your proper place in the boardroom as the chief customer advocate and the driver of customer loyalty, revenue, and profit?

Service and support is the new marketing and sales. Brands are driven through service and support interactions. Today's business models put a premium on customer retention. And loyalty is taking center stage as the primary driver of profitability. The executives that understand this new vision will stand out from the crowd, and the teams that execute on this vision will prosper.

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"The value of service and support will be measured in new, more strategic ways. The focus of measurement will shift from service revenue and margin alone to service revenue and margin **plus**

- Improved product margins
- Reduced cost of sales
- Reduced time before product repurchase
- Increased market share
- Increased total customer profitability"

Stephen Smith, Executive Director of the Service and Support Professionals Association, *Winning Service Strategy in a Changed Economy*,

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Becoming the company's revenue engine requires both leadership and the right enabling technology. Leaders must send the right messages and measure the right things. Support needs to help customers help themselves and each other, while gaining and using knowledge with every customer conversation.

Technology needs to do its part, too. In particular, technology must handle the unification of case management and knowledge management by integrating knowledge capture, knowledge maintenance, and knowledge reuse directly into the case management workflow. Also, technology needs to provide a rich customer experience for self-help and support communities: vendors must "think outside the search box."

By combining these leadership practices and technology that supports them, service and support will become the revenue engine of the company.

We believe this that this is the decision that must be made, and these are the actions that must be taken. Especially in this economy, when revenue and profit are on the line, there's no time to lose.

## About David Kay and DB Kay & Associates

Since its founding in 2002, DB Kay has provided thought-leading services to the customer service and support market. DB Kay customers include Cisco, Openwave, Eaton, QUALCOMM, Research In Motion, TI, Tektronix, VeriSign, IBM, Target, Epiphany, IronPort, Genesys, and Cognos. 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 conferences and webinars. He was recognized as an Innovator by the Consortium of Service Innovation (CSI), and has been certified as a Knowledge-Centered Support trainer by HDI and the CSI. He held leadership roles at an innovative knowledge management technology provider from early 1998 to the end of 2002, and has been granted five patents for knowledge management technology. His current work leverages twenty years of experience in envisioning, developing, marketing, and rolling out technology to aid knowledge-intensive businesses. David co-authored the first book on knowledge management for service and support, Collective Wisdom: Transforming Support with Knowledge, which is now available on Amazon.com.

## About Tim Hines

### Vice President, Product Management, Consona CRM

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.

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