Finding a **Customer Support Solution** – What to Consider

Select a Solution That Follows Best Practices

Many business express frustration as they attempt to manage their support activities but find little in the way of substantive guidance. There are several standards out there to help you not only manage your support efforts but also improve and make it both accountable and cost effective. The IT Infrastructure Library (ITIL) is the world’s most widely accepted approach to the management and delivery of IT Services. The top benefits from implementing ITIL are:

- It provides a single, definable, repeatable, and scalable documented framework for best practices that flow across the organization and ensures everyone is “talking” to same language as well as providing a framework to support regulatory challenges.

- It identifies roles and responsibilities for Service Management as well as improves communication and information flows between IT and organization business departments.

- It supports reducing costs and justifying the cost of quality with ability of to measure and improve internal performance, service provisioning and user productivity.

- Improves the ability to adjust as business opportunities and challenges are presented and improves the relationship of IT with the business.

ITIL provides guidance on what should be done in order to offer the clients adequate support and services to maintain their business needs. ITIL qualifications are available for individuals but until recently there was no way for an IT organization to prove that it was working along the ITIL recommendations. The ISO 20000 standard was conceived to fill this gap. Initiated by two organizations, itSMF and BSI (British Standard Institute), it is modeled upon the principles of ITIL. This provides organizations with the possibility of becoming certified in the provision of support services.

Other standards like IEC/ISO 20000, CoBIT and Sarbanes Oxley builds on the ITIL framework and provide guidance on audit and accounting within organizations.
Select a Solution That Offers Self-Service

Offering a web self-service option helps reduce costs and workload on support desks by offering direct access to frequently asked questions and simple enquiries about open requests via a self-help web portal. By pre-empting the minor and repetitive queries that arise, call volume can be significantly reduced and thus leave service staff free to deal with more complex enquiries.

According to statistics from itSMF and HDI, a large proportion of the inbound customer service inquiries to support teams are to ask the status of open calls or to request commonly available information. Many of the requests will be well-known by the support team and can be resolved easily by the customers if they are given access to self-help tools. By analyzing the behavior of customers you can proactively add useful services and solutions over time.

Customer service demands typically follow the 80/20 rule. When starting to provide self-service, find the areas where you can get 80% of the benefits for 20% of the effort. It is important to look at ways that online self-service can help improve the quality of customer service you offer but perhaps, more importantly, you should see it as a way to reduce the need for a customer inquiry in the first place.

The Service Catalog is becoming an increasingly important medium for providing the right services in the right quantities to meet the business demand. Let the Service Catalog be the main interaction with the end users. It should not only advertise your services but take into account all the services provided. A web portal is a very cost-effective way to handle lower priority service requests. Make sure valuable phone support time is used for processing higher priority incidents, and position the web as your preferred channel for handing routine service requests.

Finally, drive the customers to the portal with announcements on new services, outages, information and manuals. To truly realize the cost and productivity benefits, you must make the self-service portal your customer’s first port of call for any information, for example: Change information, new rollouts, Policy changes, Service Level Agreements etc.
The Solution Must Support Configurability and Customization

First and foremost the solution must be very configurable (i.e. customizable), you should be able to configure your system to track any information you want without limits. Furthermore, you should not have to use a programmer or specialist to do it! It is vital that you can add unlimited fields to items, customers, etc. The solution should also allow you to define the relationships between any business object, and you should be able to create new business objects easily. In addition, you should also have the flexibility of modifying or extending the information you track at any time – not just at the point of install. Finally, any software updates from the solution manufacturer must be able to handle all of your configurations and customizations automatically without the need for a consultant or programmer.

Automation is Vital in a Solution

The quickest and most effective way to improve and get the most out of your support team is to automate processes within the service and support tools. Automation allows you to define a set of conditions, along with a set of actions, that should take place when those conditions match.

Automation should be possible in areas such as logging, routing, escalation, workflows and reporting. By configuring the solution you should be able to handle dynamic resource allocation and route incidents and problems to an appropriate team member by expertise, availability or a combination of both. You should be able to do automatic satisfaction surveys or follow-up emails as a result of logged service desk calls. By building auto responders into the system, your support staff can concentrate on solving tasks, not completing paperwork.

It is very important that a system has the capability of being extended, not only from the point of adding processes outside of a support team, but also having the ability to add additional monitoring and legacy systems. Second, it is vital that the underlying database be accessible for both additional reporting and data mining. Without “free” access to the database you might find that as soon as you need to export/import data or introduce fields and values that are not a part of the helpdesk system, it will be both expensive and difficult. Furthermore, to minimize the deployment costs you must make sure the helpdesk database requirements support open source databases such as MySQL.

There must also be support for automatic escalations that provide the ability to escalate incidents or problems based on a combination of categories, requestor and time criteria. Another area of automation is satisfaction surveys or follow-up emails as a result of logged service desk calls. Finally, the solution should have the ability to automate workflows and approval processes– not only for time saving but also for audit purposes.
Metrics are Important

In order for a support team to be successful it must operate at optimally and efficiently. It is important to measure performance metrics and take action to maximize first contact resolution. Take advantage of knowledge bases and solution databases and most importantly, log all calls. If an organization fails to log 100% of all incoming service events, vital information about the effectiveness of currently used technology will be lost. Realistically, every service event not logged did not happen, and if it did not happen, how can it be prevented from happening again?

To get the most out of both staff and systems make sure you have correct management information. The solution will have a “home page” for announcements, personalized information and the ability to display interactive and customizable information for all business processes. Furthermore, the system should also allow for customized reporting, information widgets, the creation of drill-down pivot charts, and operational information graphs. Reporting should be able to cover all the common areas and come with a range of “out of the box” reports that are easily customizable. There should also be access to reports outside the system for casual users or managers that do not require use of the full system. A common area often forgotten when looking at systems is making sure the system has the ability to add 3rd party reporting, such as Crystal Reports or MS Excel to extend the reporting capabilities, and the ability to export data for reporting, forecasting and data mining.

Alerts should be possible on all types of events and cover several mediums such email, on-screen, dashboards, SMS, pager, etc. Color coding to quickly see what is urgent. Escalation alerts and management visibility report.

Make sure to configure your reports to match a balanced score card including all aspects of the business. A balanced score card is divided into four areas; Financial information, Customer metrics, Internal Business Process measurements and Learning and Growth identifications.
Selecting a Solution

Finding a Customer Support Solution can be a daunting task. The above information takes the guesswork out of the process and provides a solid foundation for you, your team, and your organization’s success. Remember you do not have to implement all the bells and whistles straight away, just make sure the selected solution has the capability to extend to the areas you have selected.

Short list no more than five or six vendors that fit within budget and scope for your project and score these vendors against a checklist of needed features and requirements. Be clear in advance with vendors so that demos are tailored to your requirements. The key to a great demo is giving the presenter your unique requirements and challenges in advance of the demo. This way your needs are addressed and, with greater insight into your requirements, the vendor may show additional features that may be of great value to you.

Explore all areas of the systems you evaluate, and take into account things like how scalable the system is and will it cost you more to add additional processes or features in the future. Make sure that the system is able to capture all of your business processes and procedures and that you can change them without help from the vendor as that will inevitably lead to high costs.