

March 4, 2002

## Intercompany Case Exchange Puts an End to 'Customer Volleyball'

*John Ragsdale*

### Catalyst

Analyst research

### Question

The early products targeting intercompany case exchange were difficult to implement and maintain. How can companies work together to solve customer issues without ongoing maintenance headaches?

### Answer

A consumer buys a new desktop computer and encounters a problem when first booting up and calls the PC manufacturer's customer support line. The customer is on hold for 20 minutes, then a support agent walks them through a few diagnostics and determines the problem is an operating system (OS) error and tells the customer to call the OS software vendor. After another twenty minutes on hold, the OS vendor's analyst thinks a boot chip may be the problem and refers the customer back to the desktop hardware vendor. This game of "customer volleyball" is far too common and virtually guarantees low customer satisfaction and retention. If this support nightmare is being inflicted on your customers, collaborative case exchange should be on the list of projects for your support organization.

Collaborative case exchange allows a support group to dispatch or assign a support incident to another company, automatically opening a ticket in the other company's support application. The two tickets are kept in synch, writing edits made in one system to the ticket in the other system, so a quick glance by either company reveals the current status of the problem. Although vendors that resell/OEM products are the usual example given of environments that could benefit from case exchange, other examples include consumer retail companies and financial services companies that want to be the primary customer contact for upsell/cross-sell, although the customer's loan is actually serviced by another institution.

The **Consortium for Service Innovation** ([www.serviceinnovation.org](http://www.serviceinnovation.org)) (known as the Customer Support Consortium (CSC) until a name change last year) is a non-profit alliance of high-tech customer service professionals and customer relationship management (CRM) and e-service vendors. The Consortium first floated the idea of ticket exchange in 1996 and published the first set of case exchange standards, making recommendations to vendors of customer support software on architectural conventions to make secure exchange of customer cases possible. The first (and only) example of a product built to these standards was e.link from **Clarify**, but the effort involved in building and maintaining the necessary links for exchanging live data proved too expensive a proposal and the product was retired in 2000. The Consortium has defined a new exchange standard based on Extensible Markup Language (XML), meaning the massive effort previously required to tie disparate systems together is no longer necessary.

Currently there are two approaches for case exchange: full case exchange using enterprise application integration (EAI)/middleware, offering the depth (and the overhead) of 100 percent information sharing, or the **ePeople** approach, in which a subset of case data is exchanged between the separate support implementations, offering lower implementation and maintenance costs. Companies considering case

exchange need to evaluate approaches based on current agreements with partner vendors, as service-level agreements (SLAs) or other contracts may dictate the amount of data to be shared.

For the EAI approach, the leading product is iWave from **NEON Systems**, with prebuilt connectors for most CRM, support and help desk software. The advantage of this approach is the granular level of updates synched, enabling detailed research or metrics to be tracked for exchanged cases. The disadvantage is the overhead of transmissions, since much of the exchanged data may not be useful, creating unnecessary network traffic. ePeople's approach is to leverage its collaboration capabilities to facilitate secure intercompany collaborations as needed, and exchange only the case details that matter (see IdeaByte, [Look Beyond Traditional CRM Vendors for Collaborative Technical Support Products](#), John Ragsdale). This approach has lower overhead but would require tighter cooperation between companies, an ideal but not always feasible approach for multi-national corporations.

The Consortium site has useful information on the benefits and architecture of ticket exchange, but the materials are outdated. The useful "Executive Briefing" document has not been updated since 1997, listing participating vendors who no longer exist (**Vantive** is now part of **PeopleSoft**, **Inference** is part of **eGain**). While helpful from a theoretical perspective, it would be more useful if updated with details of the new XML standards.

## Recommendations

Building and maintaining customer relationships means dropping old isolationist attitudes toward customer support. When customers call for help, the agent should take responsibility for resolving the problem, including bringing in outside expertise if necessary. Even without case exchange in place, the agent can pick up the phone and call the partner company on behalf of the customer. Service means more than finger pointing and the customer will not forget the extra effort.

If it is necessary to refer a customer to another company for support, ask the partner company for a separate phone number to give to customers, allowing referred customers to bypass complex interactive voice response (IVR) menus and route directly to the correct support group. Include this information in any applicable solution in the knowledgebase so the referral numbers will be convenient for agents (and not on a sticky note on their terminal).

For companies that use quality monitoring products like desktop and call recording from **Witness Systems**, consider a trigger to record customer interactions that result in referrals to other companies, to be sure agents aren't "dumping," i.e., looking for any reason to "get rid of" the customer by dumping the problem on a partner. Agents who dump problems without adequate fact checking may be lazy, but more likely they need additional training on how to better diagnose problems.