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Look Beyond Traditional CRM Vendors for Collaborative Technical Support Products

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A vendor briefing

Question

Many support problems are resolved using a collaborative process not easily facilitated or captured by current support products. Are any vendors targeting collaborative support processes? How can we better streamline this process with our existing systems?

Answer

Collaboration has become one of the latest buzzwords latched onto by enterprise application vendors to expand the scope of both their products and their messaging. Within customer relationship management (CRM), partner relationship management (PRM) facilitates collaboration between corporate sales organizations and sales channel partners to maximize revenue, and Web collaboration in call centers (page push, for example) allows agents to quickly help customers step through a procedure or an online purchase. Yet products to encourage or ease barriers to collaborative customer technical support or help desk problem resolution are not offered by leading support and CRM vendors, probably because requirements for this have not yet bubbled up to the must-have requirement list of companies shopping for software. Companies, especially those supporting large and complex products, should recognize the collaborative element at work within the support organization, and begin tracking, documenting and optimizing the collaborative processes in place today to streamline resolution for complex problems and to begin capturing this missing knowledge capital for reuse.

While the focus of most e-service and CRM support products is a linear flow from first to second level, using a searchable knowledge base of solutions, problem resolution for complex hardware and software products may involve resources from development, quality assurance, product management, sales engineering and/or professional services. In most environments, the team that originally develop a product module are reassigned to other projects when the product ships, so tracking down the correct set of expert participants to brainstorm a solution to a critical problem may take a dozen phone calls. When the resources are identified, a "war room" approach may ensue to work through the issue.

In this situation, the knowledge base will be updated to alert agents that customers reporting this problem in the future should download the patch (or extension or widget, etc.) that resulted from the war room project. But the names of those involved and the thought process used to create the patch are missing, so when a similar problem occurs in the future, the support group will go through the same series of phone calls to identify the correct participants across the organization to involve in resolving the issue.

ePeople (www.epeople.com/corporate/solutions/home.shtml) is the first vendor to offer applications targeted specifically for facilitating collaboration for technical product support, general customer issues and developer support, tracking who has a role in solving different problems or types of problems and eliminating the day-long window lost trying to identify participants. In the ePeople model, agents are kept engaged in the collaboration, offering them visibility into other areas of the company and providing them more job fulfillment than they typically receive when their world begins and ends with the contents of the knowledge base. ePeople's Service Network not only helps locate the right resources on a dynamic basis, but also provides a common platform where the "team" can work together to resolve the problem, without having to integrate with multiple third-party tools for online meetings and data sharing.

The system offers another advantage of making it easy to document who is involved in solving various problems by pointing out to you obvious areas where knowledge transfer or cross-training could quickly lower the cost of support. For example, if a lead developer is required to resolve issues around a certain product or feature, clearly this is an opportunity to beef up training for the support team. In this situation, the lead developer will probably happily volunteer to help train key support personnel to offload this responsibility.

Outside ePeople products, companies wanting to capture this level of detail about current collaborative support processes may try including more details in the knowledge base solution objects, detailing who the experts are for each solution topic. This information may be stored in a notes or comments section on the knowledge objects, but be careful that these notes are not accessible to customers browsing solutions via a self-service site. Knowledge bases from e-service vendors, like **eGain** and **Primus**, offer this ability for "internal-only" fields on solution objects. This approach may be a good place to start, but any level of detail maintained manually is likely to grow stale fairly quickly.

Recommendations

Recognize there are different metrics for cost-justifying products like ePeople, targeted at technical support collaboration. The $40 and $80 price points usually quoted for first- and second-level support do not include the salary and missed opportunity costs of pulling in developers, product mangers, etc., from other departments. Streamlining the collaboration process can minimize the time commitment of these individuals, and the projected savings should be estimated. For information on identifying who is involved in resolving issues, and creating estimates for these expenses, see IdeaByte, Estimating Help Desk Staffing: Beyond Industry Ratios, John Ragsdale.

These collaborative support products apply to the IT help desk as well. Few companies track the costs of involving employees outside IT in solving problems. For example, finance employees may be pulled in to help with procedural questions on using accounting or human resources (HR) software, yet the help desk typically does not include these costs when calculating average cost per minute.

Support products assume a single owner for each ticket as part of workflow (one person is responsible for the ticket at all times from creation to closure) and to have an accurate audit trail. CRM vendors have introduced the team selling concept into their sales force automation (SFA) products, so a team of people can be associated with a sales opportunity, giving the entire team access to view and (if appropriate) update the opportunity and receive notifications when updates occur. However, this philosophy has not yet been extended to the support modules within the CRM suite. Companies using support software from a CRM vendor that also offers a sales module should inquire if this team concept can be added easily to support incidents with customization and if this is on the road map to be added in the out-of-box product for a future version.