

## **Telephone Support - Proven Ways to Maximize Your Investment**

**Doug Clement  
Cognos Incorporated  
3755 Riverside Drive  
P.O. Box 9707  
Ottawa, Ontario  
Canada K1G 3Z4**

### **Introduction**

Software support contracts represent a significant annual expense for most organizations. In order to maximize this investment it is important that the support be of the highest calibre. Most maintenance agreements ensure customers that the product they have purchased will remain current within changing operating environments. In addition, these agreements ensure that customers' needs are met by introducing new features to products and by providing access to a support center that delivers regular problem resolution and addresses education and information requirements. But there are other methods of ensuring a sound return on the initial software investment. This paper outlines some of the proven ways for both the customer and supplier organization to achieve this goal.

Remote customer support, generally delivered by telephone, is the cornerstone of most support agreements. It provides an effective channel for immediate customer assistance when problems are encountered, and keeps the supplier organization up to date on user satisfaction and future requirements. Typically it is a high-volume service that offers technical information about known problems and solutions, guidance on correct product usage, and assistance in the analysis of problem situations. Although dependent on the nature of a specific product, the target audience for such a service is usually the technical user designated by the customer organization as the focal point for communication between the product users and the supplier.

In the course of dealing with thousands of customer organizations, many different opinions are expressed regarding the quality of support provided. Customer opinion varies widely, from complete satisfaction and therefore a perception of value received, to dissatisfaction with the quality or responsiveness of the support organization. This variance in satisfaction is experienced by customers who are using the same products, encountering similar difficulties and dealing with the same support unit for assistance.

The question that arises is why are a majority of callers pleased with the service while others are not? A combination of factors relating to both the service and customer organizations can account for the varying degree of satisfaction.

Service suppliers face an interesting set of challenges that, if not addressed, can impact short- or long-term service delivery. Some of these challenges include:

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- a higher than normal staff turnover due to the nature of "hotline support";
- rapid vertical and horizontal product-line expansion into new operating environments;
- increased product sophistication and technical complexity;
- difficulty in recruiting staff with the appropriate combination of technical and communication skills;
- increased customer requirements and expectations;
- continued pressure to control costs.

Support center managers are constantly exploring ways to address these issues and to deliver a consistently high-quality service.

Possible solutions to these problems constitute an interesting topic for discussion, but are not the thrust of this presentation. A focus on the means of obtaining the most from your support investment is not intended to minimize the challenges facing support organizations.

Factors within the customer organization that can contribute to a successful relationship with the service supplier include:

- the degree to which supplier contact is focussed;
- product knowledge and access to product information;
- the expectations of a remote support service within an overall support strategy;
- how change in the technical environment is managed.

### **Maximizing Your Investment**

How can you maximize the benefits available from a remote support service? Following are some proven techniques:

#### **• Establish the Correct Support Center Liaison**

Focussing contact with the service supplier through a small group within your organization will significantly improve the relationship between you and the vendor and will result in faster problem resolution.

By channelling communication through a few individuals, a familiarity is developed between those who require assistance and those who provide it. Through repeated contact, product expertise is developed and centralized, increasing the ability of a customer's designated contact to solve problems immediately without further assistance. Knowledge of the correct approach to problem analysis and investigation is also developed, leading to a faster problem resolution.

The customer's in-house designated contact should possess the skills and knowledge needed to function effectively as a focal point for assistance and escalation. They must have strong communication skills, proven analytical and problem investigation capabilities and the judgement necessary to prioritize issues. Product expertise can be developed by taking advantage of vendor-supplied courses at both the introductory and advanced levels prior to regular and practical application of the product knowledge. Appoint alternate contacts so that if a change in assignment occurs, or your designated contact is unavailable, the support service can still be used.

Our experience at Cognos indicates that relationships established between our support staff and designated customer contacts result in an efficient and productive framework for service delivery. Another benefit of this focussed communication is a reduced demand on the support center staff, allowing them to devote more time and attention to each issue raised.

- **Get to Know Your Service Supplier**

The wide range of responses concerning the quality of support can be explained by differing expectations within the user community. Obviously if the expectation is low, it is much easier to satisfy. Suppliers maintain different goals and objectives for their service organizations. They may see it as a necessary service, but not one that constitutes a key component of their customer communications strategy. Others may have much more ambitious goals for their support vehicle.

You should know how the service department that you deal with fits into their corporate organization. What types of questions are they positioned to deal with? How do they view their role? How do they measure their success? When should they be consulted and what results can you expect?

If these questions are not answered in your support contract or through support publications, call the support management. Discuss the structure of their organization, the problem process and other general policies and procedures.

Understanding the role of your support center, their escalation procedures and their management structure can be very helpful when exceptional action is required to deal with a sudden crisis.

- **Organize Reference Material**

Software manufacturers dedicate considerable resources to supplying comprehensive product literature to resolve anticipated customer problems and questions. This reference library can be an invaluable tool in a variety of situations. At the Cognos North American TeleSupport Center, over 25% of the calls received are solved by simply referring customers to information previously provided. Placing a call

therefore introduces an unnecessary delay into the resolution process. By organizing all related reference material and referring to it before placing a call, you can often resolve problems in a faster and more efficient manner.

A variety of information may be sent with a product release and, later, at regular intervals. Material may be provided in scheduled newsletters, documentation notes on your tape or diskette, manuals or other supplementary publications. Typically customers receive:

- manual updates;
- installation instructions;
- conversion guides;
- descriptions of new features;
- problem notifications;
- tips and techniques about product usage and performance;
- surveys and questionnaires.

It is recommended that you assign responsibility for maintaining a current inventory of all related product material to one individual. Although many people may receive product information, it is important that one person maintain and disseminate this information from a central source.

- **Educate Technical Staff**

A small investment in product education for your technical staff can result in tremendous productivity gains and faster problem resolution.

As technology advances, companies strive to make their products more powerful, more sophisticated and easier to use. Whether you are riding a bicycle, piloting a plane or using a sophisticated piece of software, you will do it better and require less assistance when you are properly trained. Education is particularly important for the individuals assigned as your designated contacts for support. They are the ones chosen to be your in-house experts. Their increased level of product knowledge will result in fewer, and more productive contacts with the remote service center.

The investment in training is often very small in relation to the cost of software and to the costs introduced by unnecessary project delays due to inadequately trained staff.

Many options are available to minimize on-going training costs, such as "train the trainer" programs, computer-based courses, or self-paced audio or video packages that can be purchased once and used as refreshers or to train new staff. Examine the options available and include the development of an on-going training program as part of your product orientation program. Remember to allow for enhanced levels of

training and product updates at regular intervals. The advanced knowledge and skills gained from this product education will guarantee that your investment is realized to its full potential.

- **Maintain a Current Environment**

Support contracts typically provide for the periodic delivery of new software releases and new documentation. New versions address three major requirements:

- the need to change software to stay compatible within the operating environment. New operating systems, changes to hardware, or upgrades to other system software may force the software supplier to enhance a product.
- the need to add new features to encourage sales and customer acceptance by responding to market requirements.
- the need to resolve outstanding, high-priority problems identified in earlier releases.

When a new version is released you may not want to undertake the risks associated with an upgrade, particularly if you have just reached the point where everything is running smoothly. The temptation may be to leave things as they are.

From the supplier's perspective, their efforts are best directed towards supporting only the current version, following a reasonable length of time to upgrade. They will concentrate their training, problem resolution and support center resources exclusively on the latest release. A problem encountered in an obsolete version may be recognized as a problem only if it also exists in the most recent release. Resources allocated to resolving it will be focussed on the latest version only.

The decision not to upgrade to a new release can lead to a potentially dangerous situation. The only solution to a problem affecting your production environment may be the immediate installation of the most recent product offering. Production pressures may force an abbreviated upgrade schedule that does not allow sufficient time to assess the impact of product changes and new features. Alternatively, it may be necessary to consume extra resources by running a parallel environment for a period of time.

Scheduling regular upgrades of all new versions to occur within the allowed time avoids panic situations and ensures that the software supplier's efforts in supporting a product have direct benefits to you. The upgrade process can be streamlined by maintaining a comprehensive library of test cases to be used when required.

If an upgrade is simply not possible due to production pressures or other scheduled system changes, take an interim step of installing the new version in a test environment. This will leave your production environment intact. Prior to raising

issues in older versions with the support center, test them thoroughly in both. If the problem exists in the current version, it will receive the proper attention when reported.

- **Isolate Problem Situations**

Proper isolation and investigation of software problems will result in faster, more complete responses from the support center.

The most difficult task facing remote support staff is translating a problem description communicated over the phone into a test case that substantiates the problem and can be used to verify possible solutions.

A tremendous amount of time can be spent in discussing the problem, dialling in to investigate, and simulating it in the support center's environment. The time invested in isolating and simplifying the problem area before contacting the support staff will be repaid many times over through faster problem resolution.

This benefit can be realized if specific steps are followed to effectively prepare prior to calling the support center. Service organizations can often provide a checklist to follow before you make contact. The list will usually request information such as:

- a description of the hardware and software environment, including all version numbers and machine model numbers;
- the exact text of system or application error messages;
- the solutions or workarounds that have been tried and the results obtained;
- the sequence of events that are required to reproduce the problem;
- any system or application changes introduced immediately prior to the occurrence of the problem;
- any patches or temporary fixes that have been applied;
- an accurate assessment of the problem's impact on the production environment;
- the information necessary to identify the customer organization.

Initially, these checklists may seem to be an administrative burden. They are, however, effective in ensuring that all the required information is available to the support specialist. The timeliness of a response can be influenced tremendously by the quality of information initially provided.

- **Use the Best Communication Channel**

Alternate forms of communication with a remote support center can dramatically improve the quality of information and the speed at which it is exchanged.

Communicating technical issues over the telephone can be very difficult. Establishing contact on the first call can sometimes be impossible. When contact is made, the process of detailing a lengthy description of an intermittent problem can exasperate both parties. The results can be less than satisfactory.

A recent trend within support organizations has been to provide alternate communication channels, better suited to this type of information exchange. Regular mail service is available for low-priority problems, or telex for brief exchanges. Facsimile transfer has a role, but is not universally available. With the advent of personal computers, dial-up bulletin boards and electronic mail services, have opened up a wide range of possibilities for fast and accurate communication.

There are advantages for both the customer and the support center when electronic channels are used. The service supplier can manage problems more efficiently by stacking them as they arrive. In this way the customer avoids waiting by the telephone for a response, and both benefit from a more precise exchange of information. Bulletin boards or broadcast messages to all subscribers can reduce calls by supplying information before it is needed, as in the case of a known software defect not yet encountered by all customers.

Cognos has been using an E-Mail network to communicate with branch offices around the world. Recently customers have been joining as well. The result has been a more orderly support environment and an improved, streamlined level of service.

If your supplier is accessible via such a service, use it on a trial basis. If this facility is not yet available, discuss a test implementation on one of the public E-Mail services. Increasingly, electronic mail services are interconnected and governed by international standards. It may not be necessary to subscribe to the same service as your supplier in order to communicate. By using electronic mail, you can experience a significant improvement in the quality of communication.

- **Work with the Support Center Staff**

Maintaining your involvement throughout the problem-solving process will improve both the quality and timeliness of the solution. Your skilled and knowledgeable staff together with the support specialist will form a strong problem-solving team.

Responding to a wide variety of questions and problems is an inexact process. Both parties hope that a straightforward question from a customer will lead immediately to a complete and accurate response from the support center. Unfortunately, the complexities of hardware and software often place those charged with resolving problems in the role of detectives, sorting through large amounts of information to find the key to the solution.

The process of arriving at the simplest problem definition may require repeated attempts at determining important information, comparing results in different environments, and trying several possible solutions. This iterative approach calls for an investment of time and energy by both the customer and the support staff.

To achieve a satisfactory resolution it is vital that the customer's specific knowledge, the resources of the support center, and the creativity of both focus on the problem. This process involves an investment of your time along with that of the support specialist in order to effect a satisfactory conclusion.

- **Capitalize on Alternate Support Services**

Remote support assistance usually represents just one of the many services available to customers. Properly applied, these service programs can provide specialized assistance in areas beyond the capabilities of remote support.

Recognizing this, suppliers develop a wide range of services as part of their overall support strategy. These services are complementary and designed to meet the needs of a diversified customer base. Specialized consulting throughout the application-life cycle, assistance with unusual education requirements, or product start-up programs are examples of services frequently offered.

A problem raised with the support center may require the specialized resources of one of the other service components. The supplier's marketing staff or service center management can advise on alternate services and how they can be productively applied to various problem areas. As part of a product implementation plan, consider the specialized assistance available and how it can be used to ensure continued success in the use of your purchased software.

- **Provide Feedback**

Customer input enables a support organization to build on its strengths and correct its weaknesses. The result is a tailoring of services to better address the needs of its customers.

One challenge in running a support organization is determining the extent to which customer requirements are successfully addressed. Internal measurements can be used to monitor such things as call volumes and response time, but these indicators do not accurately gauge customer satisfaction.

Measuring satisfaction requires regular and frequent feedback from callers and responses to mail or telephone surveys. Mail surveys typically have a low response rate. This represents a missed opportunity for customers to impact the quality of service being delivered. When a survey crosses your desk, or when your

**maintenance renewal contract arrives, take a few minutes to let your supplier know what you think of their service. At any convenient opportunity, make your views known. Over time, customer input can result in positive improvements to service offerings.**

## **Summary**

**A remote technical support center provides a key service that, when used correctly, can help to protect the value of your product investment. Understanding the role of the support center within an overall support strategy, and taking the time to thoroughly prepare before placing a call will increase service benefits. Additionally, keeping the communication channels open will help the supplier to understand and respond to changing customer service requirements.**

