Four Imperatives for Scaling Support

A ServiceXRG Whitepaper

CONTENTS

SCALING SUPPORT

Support demand is on the rise, driven by growth of new customers and expanded efforts to engage existing customers proactively to accelerate product adoption and success.

In response, Support must employ the most effective strategies to meet growing customer demand. This requires Support to respond efficiently to new support issues and take proactive action to minimize demand for support.

The Most Effective Approaches to Scaling Support

In a recent study of 332 service and support industry leaders ServiceXRG finds that the most effective approaches to scaling Support are improving product quality, developing customer skills, and offering access to self-help resources.

Efforts to scale Support are widespread across the industry, yet the use and maturity of these efforts varies dramatically. This whitepaper will introduce the top strategies companies are using to scale support to meet growing customer demand.

> *"To counter the rise in support demand we must find ways to cost effectively respond."*

THE MOST EFFECTIVE APPROACHES TO SCALING SUPPORT

Approach	Percentage
Improve product quality	29%
Train customer to develop skills	17%
Self-Help	16%
Monitor, diagnose and alert of potential issues	9%
Automatically update products	7%
Share templates and examples	5%
Onboard new customers	5%
Host Community	5%
Provide up to date documentation	4%
Share best practices	3%
Periodic Webinars	1%

Multiple responses allowed

A Multifaceted Approach

To scale Support to meet new demand and take on high-value customer engagement activities, companies must increase investment in one or more initiatives related to issue prevention, self-help, automation, or building customer proficiency. A diversified approach with initiatives that address multiple opportunities to scale Support is most effective.

The most effective approaches to scaling Support are improving product quality, developing customer skills, and offering access to self-help resources. The most effective overall strategy for scaling Support is to use a combination of approaches.

Most companies use three or more distinct approaches to reduce support demand. These include efforts to prevent support demand (*used by 78% of companies*), customer skills and proficiency development (*used by 69% of companies*), automation (*used by 67% of companies)* and providing access to comprehensive self-help tools and resources (*used by 94% of companies*). Few companies rely on a singular strategy for Support demand reduction.

> *"The most effective overall strategy for scaling Support is to use a combination of approaches."*

FIGURE 1: TOP STRATEGIES TO SCALE SUPPORT AND REDUCE DEMAND

Prevention	Self-Help	Proficiency	Automation	None
78%	94%	69%	67%	3%

Multiple responses allowed
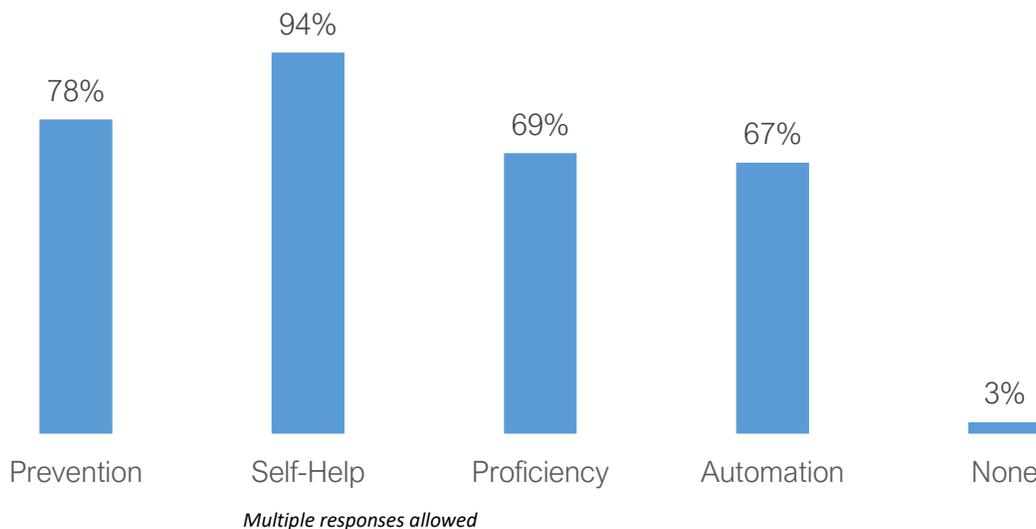
PREVENTION

Prevention encompasses the actions necessary by Support and Engineering teams to identify and mitigate performance and usability issues that create demand for Support.

Prevention Practices

Support must take the lead in identifying product-related root causes of support demand and aggressively advocate for mitigation of these circumstances. Support must work with Engineering groups to improve product supportability, advocate for fixes to performance issues, and work to identify and address issues related to product usability.

Consider the following seven approaches to help prevent support issues:

1. Use remote system monitoring and alerting to provide early warning of potential issues before they become critical.

2. Make systems and products capable of self-healing.

3. Establish a well-defined escalation path from Support to Product Engineering.

4. Integrate Support case-tracking and Product Engineering bug-tracking systems for seamless integration and ongoing progress tracking of reported issues.

5. Establish service level agreements to define the type and frequency of action for Support and Product Engineering cooperation.

6. Provide performance and security updates and patches on a regular schedule to address top issues.

7. Automate update and patch management.

> *"Support and Engineering relationships are most often focused on issues resolution rather than issue prevention."*

Prevention Metrics

Use the following metrics to measure the impact of issue prevention initiatives.

Prevention Rate

Definition	*Prevention Rate* is the total reduction of support demand resulting from mitigation and prevention initiatives.
Action	Leverage case closure analysis to identify candidate issues that can be addressed to reduce future support demand. Identify opportunities to reduce future support demand through product enhancements, customer skills development, and self-help resource development. Prioritize top issues, and plan and justify mitigation efforts. Measure the impact of each action taken to prevent support demand.
Performance Level	< 5% - Little to no reduction in demand can be expected with limited formal mitigation efforts. > 25% - Higher support demand reduction will result from aggressive prevention and self-help initiatives.

Bug Impact

Definition	*Bug Impact* is the estimated total support demand created because of product related issues (performance and user experience). This may be expressed as number of cases or cost of supporting preventable issues.
Action	Identify the top issues that generate support demand and estimate the total preventable cases if issues were fixed. Create an issue impact analysis to prioritize and justify corrective product actions.
Performance Level	*Bug Impact* varies by product type.

Bug-Fix Deflection

Definition	*Bug-Fix Deflection* is the impact of fixing priority issues.
Action	Monitor the impact of fixing priority issues by tracking the reduction in cases associated with a fix. Compare actual cases prevented by fixes to forecasted bug impact.
Performance Level	There is no established benchmark for *Bug-Fix Deflection*

PROFICIENCY

Proficiency is the measure of a customer's capability to adopt and use your products. Higher customer proficiency levels lead to faster product adoption and less need for support assistance.

Proficiency Practices

Companies need to look beyond just helping customers help themselves and consider how they can build customers' expertise so they can use and apply products more competently. Proficiency will require companies to move beyond a reliance on self-help-focused strategies and invest in building the foundational technical and business skills customers need to use products fully and successfully.

Consider the following ten approaches to help customers develop essential product skills:

1. Define formal onboarding procedures that can assess customer proficiency and recommend appropriate skills development and training.
2. Establish a skills inventory and recommended training plan as part of onboarding and adoption planning.
3. Provide access to on-demand self-paced training and skills development.
4. Provide access to Customer Success Managers or Technical Account Managers who can assess customer skills and recommend appropriate training.
5. Provide access to on-demand live coaching to help customers gain experience and build skills.
6. Provide access to instructor led in-person and virtual training programs.
7. Define learning paths to recommend skills development activities and align with available training resources.
8. Provide skills inventory and assessment tools and services to assess customer proficiency.
9. Define standards of proficiency and offer assessments and skills certification programs.
10. Make learning fun for customers and reward proficiency development.

> *"Higher customer proficiency levels lead to faster product adoption and less need for support assistance."*

Proficiency Metrics

Use the following metrics to measure the impact of training and skills development initiatives.

Proficiency Impact

Definition	*Proficiency Impact* is the estimated total support demand created by customers' inability to use and apply products due to lack of product skills. This can be measured as the number of cases created due to lack of customer skills or the cost to provide support for these cases.
Action	Forecast the total preventable support demand possible by increasing the skill level of users, developers, and administrators. Estimate the potential reduction in future support cases and associated total savings. Use the *Proficiency Impact* analysis to prioritize and justify investment initiatives for increasing customer skills.
Performance Level	*Proficiency Impact* varies by product type and maturity of training and onboarding initiatives.

Skills Deflection

Definition	*Skills Deflection* is the impact of reducing support case demand by increasing customer product skills.
Action	Monitor the impact of skills development initiatives by tracking the reduction in cases associated with increased user proficiencies. Compare actual results to forecasted *Proficiency Impact*.
Performance Level	There is no established benchmark for *Skills Deflection.*

SELF-HELP

Self-help encompasses the tools and resources provided to customers so they can access answers to typical support questions without the direct assistance of support staff. Self-help may include access to knowledgebase articles, best practice guides, file downloads, diagnostic tools, and other resources.

Self-Help Practices

Support teams represent a repository of product expertise and must work to make their knowledge available to customers. Many new support cases can be avoided if customers are able to access the knowledge and expertise of Support. Transferring knowledge to customers to help them become more self-sufficient should be high on the list of strategic imperatives for all Support organizations.

Consider the following nine approaches to help customers help themselves through access to self-help resources:

1. Provide direct customer access to up-to-date solutions to common customer issues.
2. Provide enhanced search and discovery capabilities to help customers find answers.
3. Implement formal knowledge management processes to create new and update existing knowledgebase content.
4. Supplement the support knowledge base with customer access to documentation, release notes, getting started guides, help files available.
5. Deliver more than just answers to frequently asked questions and develop a repository of best practice guides, examples, same code, templates, etc.
6. Take advantage of delivery formats including text, video, and interactive guides.
7. Provide access to self-guided tools and utilities to assist customers with self-diagnostics and issue repair.
8. Create and nurture and active user community to facilitate peer-to-per issues resolution and sharing of best practices.
9. Provide access to self-paced training, recorded webinars and other skills development resources.

"Many new support cases can be avoided if customers are able to access the knowledge and expertise of Support."

Self-Help Metrics

Use the following metrics to measure the impact of self-help.

Self-Help Coverage

Definition	*Self-Help Coverage* is the extent to which self-help content and resources cover known support issues.
Action	Maintain a list of the most frequently reported topics and issues and assure that solutions are fully documented and accessible to customers. As new issues are reported, evaluate the likelihood that other customers will need similar answers. Develop solutions to topics that are anticipated to be in demand and resolvable though self-help.
Performance Level	>80% of known issues are documented and accessible to customers through self-help resources.

Self-Help Usage

Definition	*Self-Help Usage* is the rate that customers attempt to use self-help resources prior to requesting assisted support.
Action	Capture all unique self-help sessions to indicate the extent of self-help resource use. Collect page views, searches, document opens, downloads, community posts, and other self-help events.
Performance Level	According to ServiceXRG's user-based research, 66% of customers attempt self-help use prior to requesting assisted support.

Self-Service Success

Definition	*Self-Service Success* is the rate that customers report finding useful information through Self-Service resources.
Action	Measure the rate that customers find useful resources through self-help. Leverage pop-up surveys and post transaction events to capture customer feedback.
Performance Level	According to ServiceXRG's user-based research,55.7% of customer report finding useful content though self-help.

Self-Service Deflection

Definition	*Self-Service Deflection* is the rate at which self-help and automated resources satisfy customers' service demands that would otherwise be handled by assisted service staff.
Action	Implement a reliable method to determine the impact of self-help resources on reducing assisted support demand. See ServiceXRG's method for [measuring self-help deflection]().
Performance Level	According to ServiceXRG's support industry benchmark research, the current industry average rate of deflection is 19.8%.

Increase in Self-Help Use

Definition	*Increase in Self-Help Use* is the rate of increased use reported by companies experiencing *Self-Help Usage* increase.
Action	Measure the rate of change in self-help resource use. Monitor unique visitors and transaction types to determine how usage is changing.
Performance Level	According to ServiceXRG's support industry benchmark research, the current rate of growth for self-help use is 8.9%.

AUTOMATION

Automation plays an increasingly important role in support case deflection and management activities. Service automation can provide intelligent answers to customer questions or perform simple, repetitive, yet important tasks. The more we can automate service tasks the less time skilled support staff need to be involved in lower value activities.

For case management, simple, repetitive, yet important tasks such as sending follow-up transaction surveys, notifying customers when a case is closed, or acknowledging receipt of a new case can enhance the customer experience without requiring extra time and effort by Support staff.

More sophisticated automation, such as conversational chatbots, or matching and suggesting solutions to customers as cases are created (web form) or received (e-mail) help deflect the need for support assistance.

> *"The more we can automate service tasks the less time skilled support staff need to be involved."*

Additionally, the ability to automatically route new cases to the best qualified individual or team can also help to expedite resolution. Companies are also introducing intelligent automation into case flow processes to help discover, refine, and resolve customer issues through chatbots, and to identify cases that can be automatically closed.

Automation Practices

Support has relied on training, technology, and self-help to achieve efficiency gains, yet the potential of service automation and AI offers so much more. The introduction of intelligence afforded by AI-enabled systems will fundamentally change the way Support is delivered by remove support staff from repeatable and predictable tasks.

Consider the following five approaches to service automation:

1. Introduce conversational chatbots to assist with issue triage and preliminary diagnostics.
2. Enable chatbots to answer customer questions when possible or route cases to the best qualified resource for resolution.
3. Match and present available solutions as new cases are created via web or submitted by e-mail.
4. Use AI-enabled automation to discover "at risk" customers and alert necessary Customer Success or Technical Account Management.
5. Automate simple and repeatable case management activities.

Automation Metrics

Use the following metrics to measure the impact of service automation.

Automated Events

Definition	*Automated Events* is the number of events for a specific period that are automated. The events counted must be tasks and activities that are currently or were previously done by Support staff.
Action	Count the number of tasks and activities that are performed with automation. Tasks may include some aspect of case management, automate reporting and alerting, or direct customer interaction through chatbots and other intelligent interaction methods.
Performance Level	Nearly half of companies automate some aspects of their case management procedures. Nearly 20 percent of electronic cases are engaged with conversational chatbots, and over 40 percent of companies attempt to automatically suggest answers to customers as cases are created (web and e-mail).

Automation Success

Definition	*Automation Success* is the rate that machine delivered services provide a successful answer to a customer question and/or tasks are performed successfully without the direct involvement of support staff.
Action	Count the number of discrete solutions delivered to customers through automated means and the number of tasks that are successfully performed without direct Support staff involvement.
Performance Level	According to research conducted by ServiceXRG, companies using chatbots for support report that 60% of chatbot sessions are considered successful. ServiceXRG does not currently maintain a benchmark for automation success of standard service tasks.

Automation Deflection

Definition	*Automation Deflection* is the rate that automation fully resolves a support issues without the direct involvement of Support staff.
Action	For a concise definition of deflection see How to Define and Measure Deflection.
Performance Level	According to research conducted by ServiceXRG, companies using chatbots for Support report that 40.7% of chatbot sessions deflect cases from assisted channels.

ABOUT SERVICEXRG

Since 2004, ServiceXRG has guided the world's leading technology companies in their strategic efforts to retain customers, grow recurring revenue, and achieve cost efficiencies through the delivery of high-quality technical support and customer success services.

We accomplish this through in-depth technology services industry research, best practices and performance benchmarking, and expert coaching services.

We believe that Support and Customer Success are fundamental to customer retention and recurring revenue growth.

We help large and small technology companies to implement, optimize, and transform their service offerings, pricing, policies, and delivery capabilities. We are ready to help you improve Support delivery performance; implement best practices for Customer Success; or drive to a future state of converged Support and Success cooperation.

About the Author

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A noted authority on technology services, Tom leads ServiceXRG's research initiatives and publishes extensively about service industry trends and best practices. He helps leading companies develop and execute service strategies that strengthen customer relationships and optimize financial performance. Prior to founding ServiceXRG he held positions at IBM/Lotus, Gartner, and the Service and Support Professionals Association (now known as TSIA). Follow Tom on LinkedIn.

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