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CUSTOMER SUCCESS STORY

Jackrabbit Technologies

Delivering Customer Support That Is a Class Above

JACKRABBIT TECHNOLOGIES HELPS YOUTH ACTIVITY CENTERS KEEP KIDS ACTIVE WITH TEAMSUPPORT.

Jackrabbit Technologies has been the leader in providing online class management software for business sectors in the children's activity center industry since 2004. Owners of more than 6,000 gymnastics and cheer gyms, dance studios, swim, music, and martial arts schools, and childcare centers trust Jackrabbit to help their operations run smoothly and efficiently, improve and expand their student base and revenues, and take complete control of their businesses.

Operating in all 50 states and 28 countries, Jackrabbit Technologies is the industry's most responsive, reliable, and robust class management software for youth activity schools and childcare businesses—proven by the many awards and recognitions the company has received.

Priding itself in providing the best customer support in the industry, Jackrabbit Technologies promises initial response to a ticket within one hour. The company also promotes very strong core values and wanted a solution provider that had similar values.

THE BUSINESS CHALLENGE

Jackrabbit has a 100% remote workforce located across several states and Canada. Ticket management through e-mail posed several challenges, including the lack of visibility into the ticket history from one agent or one shift to another.

When Client Services Director Jorine Jones, started investigating customer support software solution providers, TeamSupport was the only system that offered the ability to include images and video. This proved to be a game-changer for streamlining communications between agents and between agents and customers.

With no inbound phone support, the TeamSupport chat feature would enable clients to communicate with support in real time. (Now, chat tickets comprise the majority of Jackrabbit's tickets.)

Looking forward, Jackrabbit Technologies is developing a support program for the childcare market that is different than the solution offered to youth activity schools. The company needed a solution that would be customizable and scalable as it continues to grow its client base and new product offerings.

> *Being able to include images and video to our tickets was imperative to our solution and in communicating with our customers. Without it we would not have transitioned to a ticketing system at all.*

JORINE JONES
Client Services Director

IT'S ALL ABOUT THE RESULTS

Since implementing TeamSupport, Jackrabbit Technologies is experiencing full visibility from any support agent into the customer and contact history of tickets, streamlined communications between agents and customers, and more efficient and transparent support team management.

SOLUTION-DRIVEN IMPACT

Inline images and video help explain issues.

Full visibility supports **100% virtual staff.**

Insights reveal trends + more equitable work allocation.

Opportunities for product improvement are uncovered.

Chat feature enables **real time communications.**

WORDS OF ADVICE FROM JACKRABBIT TECHNOLOGIES

"Fully understand the customization capabilities and the flexibility in integrations from the solution providers you are considering. Approach the implementation of your new solution as an improvement and remain flexible. Adopt a solution that will allow for that.

"Consider assigning project leads with both technical acumen ***and*** vision. You will have to modify workflows to fit the solution and customize the solution to fit your workflows. Approach the project from both ways.

"Look at the solution provider's size; you want them to be able to relate to you and your business. And talk to their customers.

"Test solutions as if you are the customer; for example, e-mail-to-ticket communications, pop-ups, visibility into status of ticket, and how the chat feature works."

AWARD-WINNING SOLUTION

Plano, TX, June 01, 2016

WorldVentures, Nxt-ID Reveal SmartCard User Interface Features in Development

Summary

—New innovation to allow WorldVentures DreamTrips™ Members to earn restaurant points to use towards purchase of vacations.

—DreamTrips Members to experience more engaged and convenient way to travel with one smart card.

—UI to feature touch controls, multiple notification methods, connectivity to services, and power-saving states.

May 31, 2016

(PLANO, Texas) WorldVentures™, a privately held leading direct seller of vacation and entertainment club memberships and *Inc.* 5000 fastest-growing company, today revealed some of the user interface (UI) features for the new SmartCard in development with Connecticut-based Nxt-ID, Inc. (NASDAQ: NXTD), a company focused on the growing m-commerce market. The SmartCard's UI is being customized with features that include:

Cloud P2P Automation. Easy. Powerful. Smart.

Client Success Story

FRESH MEXICAN GRILL

A restaurant chain where "Mexican food is done right" does AP automation right. With Yooz.

About Salsarita's

Since its beginnings in Charlotte, NC in 2000, the restaurant chain has expanded to locations in 18 states and is still growing. With a bright, colorful, comfortable restaurant and signature dishes like its Quesorito, customers and interested franchisees ask, "how do you do it all the time?"

The company's secret? To start each day making fresh, house-made salsas. They're so good, it's what the restaurants are named after. Hand-mashed guacamole. Wildly addictive tortilla chips made fresh all day, every day. Flame grilled choice steak and chicken. And personalized meals to each customer's taste. From Buffalo, New York, to Knoxville, Tennessee, to Tyler, Texas, Salsarita's is almost always the locals' choice for "Best Mexican Food."

Salsarita's pledge, "Mexican Food Done Right," is what it strives to achieve in all of its restaurants.

Salsarita's AP Challenges and the Yooz Solution Fit

A Sage Intacct ERP subscriber, the dedicated AP clerk was processing around 500 documents per month. Each of the individual restaurants were manually receiving paper invoices—food and supply delivery people would leave paper invoices along with the delivery—then routing these documents back to headquarters either via courier or overnight services every week.

Even in the rare cases when a vendor sent an invoice electronically, the AP clerk still had to print out the document, process it, **then re-scan** it back into the system.

The highly manual, paper-laded workflow resulted in numerous pain points:

- A large number of lost invoices
- Wasted time spent hunting down invoices
- Hundreds of dollars per week spent on document delivery via courier or overnight services
- A backlog of 6,000 documents per month waiting to be manually entered or scanned into the system

All making for a very unpredictable month-end.

"Many of the providers we considered offered a 500-pound solution for our 10-pound problem. Yooz, seamlessly integrated with the Sage Intacct ERP, was the perfect fit. And it will scale as we grow."
Tim Carter, chief financial officer

Implementation

Carter expected the Yooz implementation to take six months. He began with one company-owned restaurant piloting the Yooz platform. Documents were scanned in real-time at the time of receipt. No more pressure to save all of the paper invoices until a courier/ overnight service shipped them to headquarters each week. No more worry about losing documents. After this successful pilot, the solution was rolled out in two other high-volume stores.

Six weeks of pre-work with the Yooz implementation team (loading GL codes, document types, etc.) and six weeks of pilots equaled about 12 weeks total—half the time of what was expected.

It's All About the Results

The Sage Intacct and Yooz joint solution not only met the needs of Salsarita's and solved all of its workflow challenges, it also turned out to be much more useful than the corporate leaders expected. They have discovered other uses for Yooz, such as communicating H.R. and other time-sensitive documents to headquarters.

33%
of bookkeeper's time freed up for more value-added work

Processing/ Communicating
38%
more documents/ month

No more document delivery, saving
$20K/year

More **predictable**, more **accurate** month-end

Words of Wisdom from Salsarita's Tim Carter

How do you leverage and make efficient the human resources that you have?

It's what franchises always struggle to answer. Rather than hiring additional people, give your existing staff the automation tools to make their roles multi-faceted. Your finance department—all d epartments for that matter—can run lean and take on more strategic, value-added duties.

Had we not implemented the Yooz solution, we would have had to hire additional bookkeeping staff by now.

Don't make assumptions about what a solution's capabilities are.

For example, Carter was asking potential providers questions about document processing only and learned along the way that what he really needed—and ultimately found with Yooz— was a complete end-to-end invoice processing and payment solution that could do so much more.

Yooz North America Wins Three Prestigious Industry Awards in Q1 2019

Email | Print Friendly | Share

April 08, 2019 10:55 ET | **Source:** Yooz Inc

DALLAS, April 08, 2019 (GLOBE NEWSWIRE) -- Yooz North America, a leading cloud-based AP automation solution provider, has received three industry awards in the first quarter 2019, being recognized as an intelligent, cloud, SaaS innovator by nationally respected technology and finance organizations.

CFO Tech Outlook named Yooz a 2019 Top 10 Accounting Solution Provider. The publication's editors conducted a comprehensive study of leading vendor firms globally that have carved a niche by delivering innovative solutions. Yooz also received this recognition in 2018.

FinTech Breakthrough, an independent organization that recognizes the top companies, technologies, and products in today's global FinTech market selected Yooz as the winner in the "Best Procure-to-Pay Software" category. This is the second consecutive year that the company has been recognized as the Best P2P Software solution in the annual awards program.

"Yooz's intelligent invoice and payment processing automation solution is driving digital transformation for finance professionals," said James Johnson, Managing Director, FinTech Breakthrough. "With new capabilities such as AI and machine learning functionality that enhance document classification, recognition, and fraud detection."

Spend Matters recognized Yooz as a 2019 Provider to Watch as one of two lists—50 Providers to Know is the other—that recognizes both the best-in-class providers and exciting innovators in the procurement and supply chain space. Honorees are selected by the Spend Matters analyst team. This the third year in a row that Yooz has received this honor.

Yooz was recognized seven times in 2018, more than any other provider in the AP automation industry: In addition to The CFO Top 10 Accounting Providers, FinTech

From Artificial Intelligence to Financial Intelligence: Leveraging AI to Strategically Transform Finance Teams

GUEST CONTRIBUTOR - August 3, 2018 8:00 AM | **Categories:** Accounts Payable, Finance, Invoicing, Technology | **Tags:** L2, technology

AdobeStock/ktsdesign

Spend Matters welcomes this guest post from Laurent Charpentier, chief innovation officer and COO at ***Yooz*** *North America.*

As some call it the fourth industrial revolution, artificial intelligence (AI) fascinates us, raises many questions, excites us, even scares us a little. (I'm still not sure I want to be on the same roads as self-driving cars!) But there is no denying that AI makes our daily lives so much easier than it was a few years ago, and much more than imagined.

When we talk about AI, we immediately think about what we use every day, such as virtual assistants or

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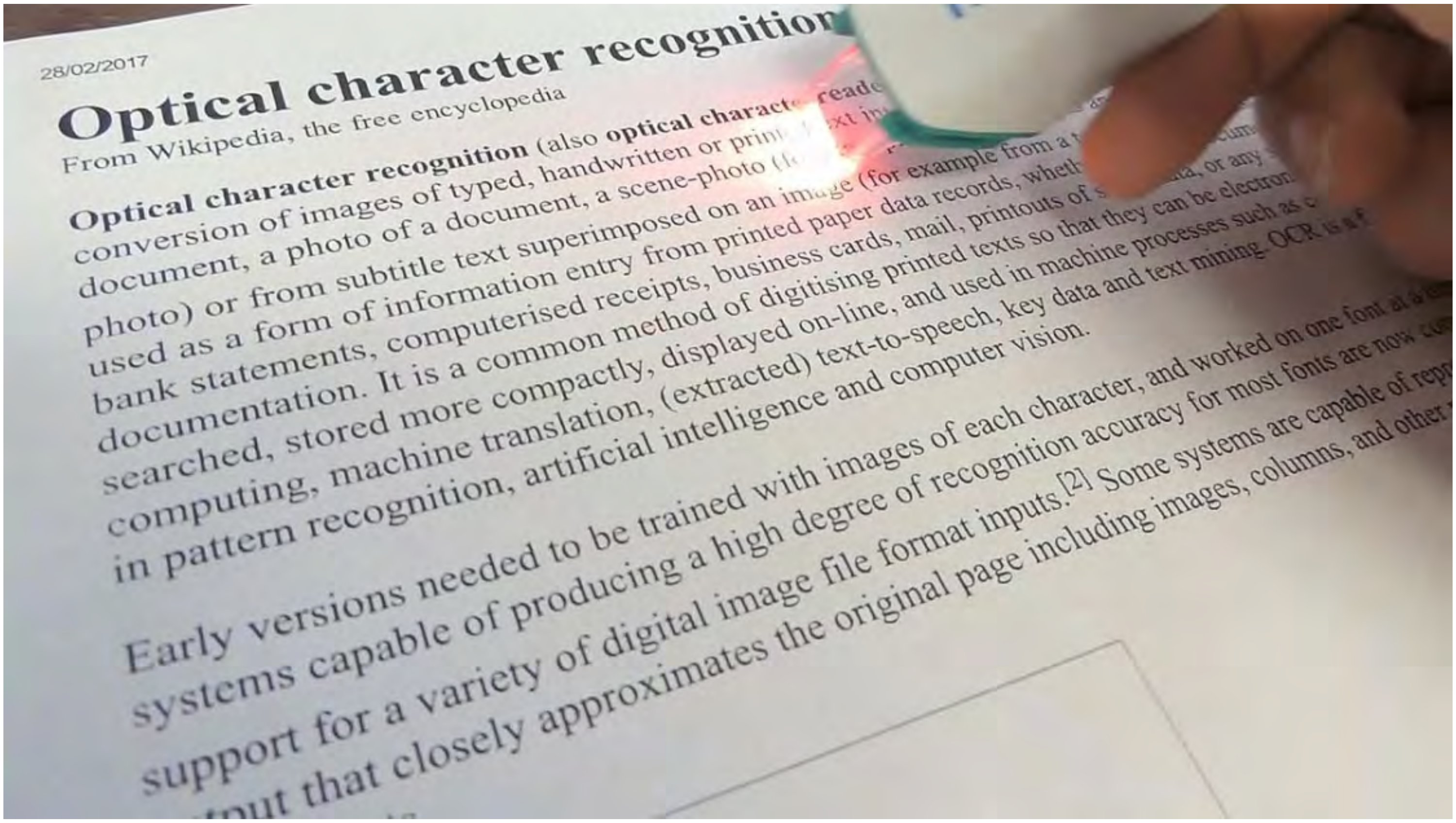
The Rise of the Social Enterprise: Working Toward a Symphonic C-Suite (Part 1)

Procurement **Research**

Debunking the Myths of Optical Character Recognition What it is, what it isn't, how it works, and how it impacts AP

BY JUSTIN HOLDEN, YOOZ NORTH AMERICA DIRECTOR OF SALES | AUGUST 13, 2018



OCR: Another one of those technical buzzwords that we're hearing a lot about these days. It's of particular interest in FinTech (another new buzzword that stands for 'financial technology') and even more specifically in accounts payable. But what is it? More importantly what ***isn't*** it? And how does it make a difference in the AP workflow?

OCR stands for optical character recognition. It is the mechanical or electronic conversion of images of typed, printed, or even handwritten text, into machine-encoded text. The text can come from a scanned document, a photo of a document, a scene-photo (for example the text on signs and billboards in a landscape photo), or from subtitle text superimposed on an image (like from a television broadcast).

It looks like this:

Simply put, it's a computer looking at an image or file and being able to identify what is on it. And herein lies the biggest misconception. Many confuse OCR with data extraction.

So, what is OCR exactly? OCR is a technology that turns a picture into words. The next layer, smart data extraction, understands and processes the text from the OCR to transform it into relevant data. As many of you are exploring AP automation providers, you may ask, "Do you have OCR technology?" This is an important question. But what you really want to know is if the solution has a complete technology, combining OCR, smart data extraction, and machine learning. Today, there are three predominant types of extraction technology:

1. Human verified or outsourced extraction
2. Zonal-based extraction that utilizes predefined templates
3. Systems based upon artificial intelligence (A.I.) or machine learning.

These are necessary as OCR by itself does not know what to do with the information it reads. Some providers might use OCR, but then apply human extraction, outsourcing to a third party—also called third-party verification. OCR extraction that layers human verification uses people to put data read by the OCR into predefined fields. In this scenario data entry is done by an outsourced firm and takes time as the data is being populated by people, typically 24 to 72 business hours.

In a template-based data extraction tool, a user has to predefine specifically "where" on a document a specific piece of information can be found and "what" the tool should do with the data it finds. The extraction process can be done fairly quickly, however, it can become an administrative burden as templates must be managed and updated as documents change. In this scenario, humans have to constantly manage the templates; read them, interpret them, and update them. This might defeat the intent of transitioning to AP automation because you are not saving time, and it might even be *more* time-intensive. Even duplicating efforts in some respects.

Data extraction using A.I. or machine learning is able to "understand" what information on a document needs to be used and, more importantly, what should be done with said information to make it relevant data. For example, technology utilizing machine learning is able to populate the Total Amount of an invoice without being taught or shown where to grab the data. Because the tool has seen thousands of examples it is able to draw on past experiences to make conclusions.

When it comes to the Yooz AP automation solution (http://www.getyooz.com/), the Yooz smart data extraction technology leverages OCR to read information from scanned/photos of paper invoices or invoices images received via email. It then interprets the information, extracts the relevant data, then applies it to the appropriate field in the application to then be reviewed and sent for approval. Finally, the data is exported to an ERP. If there are pieces of data that cannot be interpreted or read, Yooz learns over time how to extract those missing pieces. This is referred to as machine learning, and is powered by A.I.

With constant enhancements, no end user is ever involved to teach the software. The staff transitions from manual data entry and third-party verification to simply reviewing data extraction for accuracy. If there is a miss, the reviewer can click inside the Yooz application to quickly correct it and flag the miss. Utilizing machine learning optimizations, the system will become more intelligent over time, reducing the number of mistakes.

Today's organizations are focused on speed, efficiency, and leveraging technology to solve business problems. When looking at options, take the time to first set your business goals and determine what challenges need to be solved. Then find a solution that solves as many *or all* of those critical needs. Sure, you can ask, "Do you have OCR?" But don't stop there. Keep digging until you have a complete understanding of each solution you are considering and, more importantly, what best suits your business.

For more than a decade Justin has leveraged cloud-based software, in both the electronic payments and business process automation spaces, to help companies increase their efficiencies and grow their businesses. Yooz provides AP Automation intelligence to more than 1,800 global customers, turning AP departments into profit centers by streamlining the invoice process workflow. Born in the cloud, it stays on the cutting edge of innovation by reinvesting 25% of its revenues into R&D. Yooz leverages the technology platform of its European sister company ITESOFT (Paris: ITE), a leader in intelligent document capture and process automation. Learn more at www.justyoozit.com. (http://www.justyoozit.com.)

CASE STUDY

CORPORATE OFFICE PROPERTIES TRUST

sciEnergy
www.scienergy.com

THE CLIENT

Corporate Office Properties Trust (COPT) (NYSE: OFC) is an office real estate investment trust (REIT) that acquires, develops, owns, leases, and manages high-quality office and data center properties in the Greater Washington, D.C./Baltimore region. COPT serves the specialized requirements of U.S. Government agencies and defense contractors, most of which are engaged in defense information technology and national security–related activities.

THE CHALLENGES

After a series of onsite building analyses determined that capital upgrades were necessary to achieve maximum energy performance and energy savings. COPT recognized these improvements' importance—but how to fund the project?

HOW SCIENERGY HELPED

SCIenergy devised a Managed Energy Services Agreement that fully funded the capital upgrades with the energy savings those upgrades provided. A MESA® determines the payback criteria needed to fully fund a project with energy savings—and these criteria vary by project. For this portfolio, a simple payback target of 5.5 years was used as the benchmark for a fully fundable project.

The scope of the agreement was 10 years, beginning in 2006 and addressing energy management, lighting, and mechanical systems. Savings were expected to be achieved primarily through high-efficiency lighting and HVAC systems, as well as digital controls for the building systems, cooling towers, and boilers. The buildings' energy systems were retrofitted, upgraded for current standards, and made more efficient.

The MESA mechanism offered a tremendous opportunity to unlock large numbers of retrofits within the project scope due to its simplicity and intelligibility. SCIenergy's innovative approach was to look at the program at the portfolio level, rather than building-by-building. This allowed savings and costs to be aggregated across multiple buildings, increasing investment and total captured savings. And adding more buildings into the portfolio reduced the risk of off-target performance from any individual building.

Further innovation stemmed from using EnergyScape measurement and verification software to ensure savings lasted and would drive savings even higher.

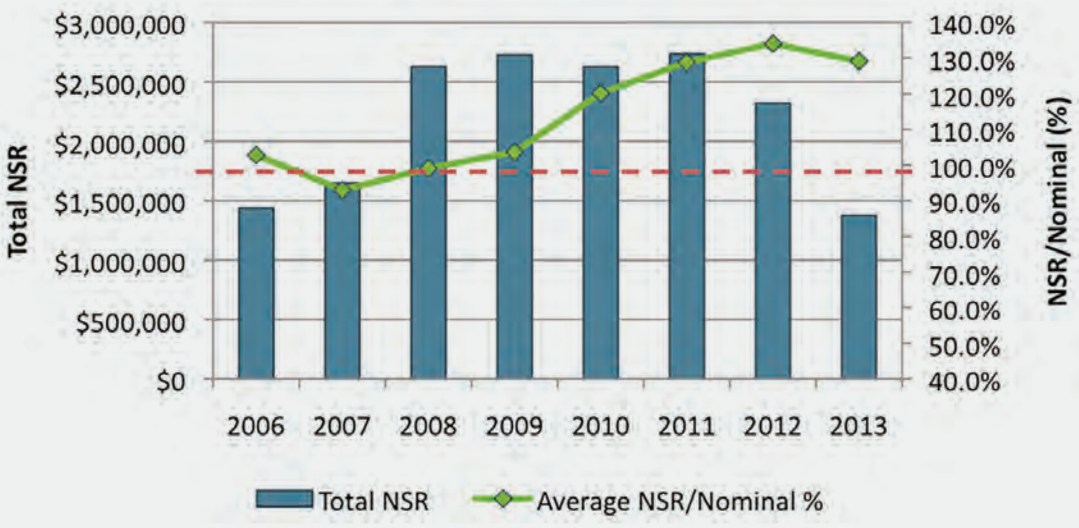
RESULTS, RETURN ON INVESTMENT, AND FUTURE PLANS

Building performance* from 2007 to 2012 shows an increase year over year from 93% to 134%. Many projects in the industry see savings that erode over time, but SCIenergy's approach resulted in improved performance over the life of the contract. The total average performance for all buildings and all years is 114% of expected savings.*

SCIenergy's portfolio approach supported a total cost of $13.5 million, fully funded by MESA, and resulting in nearly half a million square feet of space being made more efficient. This represents 84% more available investment capital than a project-only supported cost of $7.3 million. Additionally, deviation of actual savings from nominal was 3 times less at the portfolio level than building-by-building.

COPT's total 26-building project payback was 5.4 years, an ideal target for fully funded investment, and under the expected target of 5.5 years.

TOTAL PROJECT PERFORMANCE BY YEAR



**Performance is represented as Net Service Revenue (NSR), the total amount of money saved during an individual performance year.*

SCIenergy raises building performance, improves occupant comfort, and increases property values by leveraging energy efficiency as an asset. It minimizes owners' investment risk by taking over utility bills and paying for upgrades. SCIenergy integrates technology, service providers, and capital markets to reduce energy consumption by 20% to 40% using its proprietary diagnostic, analysis, and management programs. Since 2002, SCIenergy has uncovered ways for clients such as the City of San Antonio, Childress Klein, Drexel University, and Hyatt Hotels, to be more efficient, more sustainable, and more profitable. Headquartered in Dallas, SCIenergy has offices in New York, San Francisco, Chicago, and Atlanta.

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dealertrack technologies.

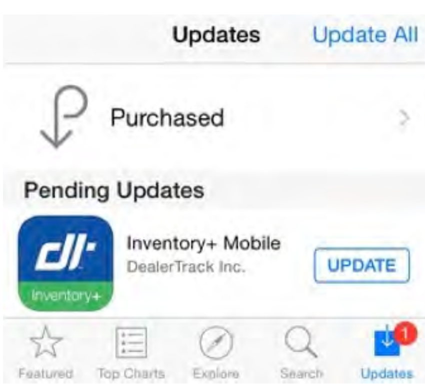
The Driver's Seat Biweekly Update

What's Crossing the Finish Line and What's Still in the Race at Dealertrack Inventory Solutions

Issue: March 11, 2015

Inventory+ Mobile App 4.1

We are pleased to share that there has been tremendous progress in improving the new Inventory**+** Mobile product. The **Inventory+ Mobile App 4.1 is now available** for download in the App Store[SM].



Update in the App Store: If you do not have the automatic update feature activated in your mobile device settings, open the App Store and select "Updates" in the menu, then click the "Update" button next to Inventory**+** Mobile 4.1.

Post a review: Dealers who have upgraded to the **Inventory+ Mobile App 4.1** are invited to post a review. Your feedback will help us make improvements!

What you can expect to experience with the update:

New Features:

Dealertrack Inventory+

MANAGED SMARTCHAT® JUST GOT SMARTER.

A SHOPPER JUST BECAME A BUYER.

AND YOU JUST SOLD ANOTHER CAR.

Learn more about SmartChat.

888.518.5513

dealertrack.com/chat

SmartChat®

What's the best thing about a Managed SmartChat service that allows dealers to connect with potential buyers when and how they want to 24/7?

More shoppers turn into buyers!

With SmartChat

Your lot is the easiest place to shop—virtually—with a chat service that "sticks" across platforms. You won't lose shoppers—and they won't lose you—when they continue to browse your site. They spend more time with you. You get more complete info and better quality leads.

An 85% lead conversion rate proves it*.

Your active inventory is fully integrated, arming your highly trained SmartChat team with the exact same information a salesperson on the floor would have.

Your dealership is open 24 hours a day, 7 days a week—effectively adding a second and third sales shift.

With SmartChat I know my dealership will never miss a qualified lead...ever! I have full confidence that Dealertrack's SmartChat team is working just as hard at selling vehicles as my own sales team.

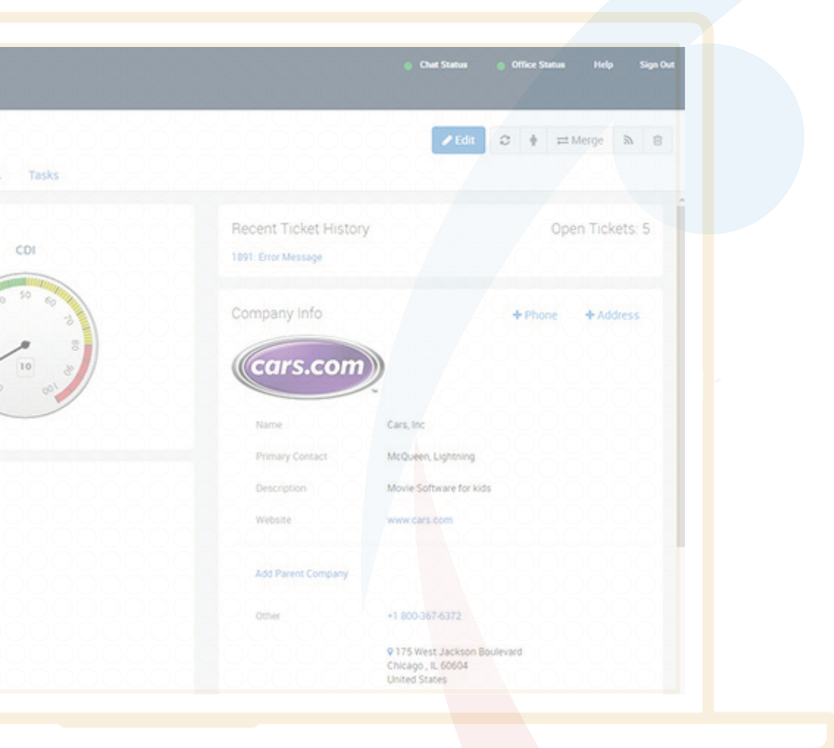
Connie Dealer,
Dallas, Texas.

*Based on Inventory+ SmartChat report analytics from January 1, 2014, to August 31, 2014.

B2B Customer Support Software:

A Step by Step Guide

The Journey from Discovery to Onboarding and Beyond



TeamSupport.com

eBook

Introduction

Customer service organizations must rethink their cultures, staffing practices, and measures of success to best support the new workforce.[1] That's according to the Forrester® report on 2020 customer service megatrends. Doing so will take a reimagination of your current strategy and the way you measure success. **On the customer's terms, not yours.**

This is particularly important when it comes to B2B (business-to-business) customer support, where the customer is a more complex entity. They are also higher value than a B2C (business-to-consumer) customer. Which means that if your customer support falls short, the cost of losing that customer has a much higher negative impact to your organization.

This eBook provides a step-by-step guide to:

- Understanding why now is the time to change your B2B customer support software.
- How to choose the right B2B customer support software solution for your business.
- Ensuring a successful implementation process.
- Knowing what to expect after onboarding.
- Tools and resources that empower B2B customer support teams to get the most benefit out of their software solution.

Signals That Alert You It's Time to Change Your Customer Support Software

To get started, below is a critical list of key questions to ask—and answer honestly—to better understand if now is the right time to implement a new B2B customer support software solution.

- **Does your organization have a customer-focused culture or one focused simply on getting tickets closed?** Forrester Research analysts have determined that in 2020, companies will continue to empower agents with more customer knowledge. They will start to make customer details visible and accessible to all departments working on customer issues in an effort to better organize around the customer. They will empower agents to seamlessly move between channels during interactions, preserving context and content to deliver personal, effective experiences.[2]

At TeamSupport, we refer to this as having a holistic approach to managing customer relationships.

- **Can managing support interactions be chaotic?** Believe it or not, some companies are still relying on spreadsheets and e-mail to manage different areas of customer support. This is often a clear sign of chaotic support interactions. Other signs include clunky or no software integrations (which creates duplicate work, staff inefficiencies, and unneeded time spent on workarounds), software built for a B2C retail environment when they are B2B, and no set standards for responding to customers based on issue severity.

How do you manage customer interactions?

No formal tracking of customer support interactions

Informal tracking, note taking, or paper based

Home grown or Excel-based tracking

A system disconnected (island) from other key customer systems

Fully integrated customer tracking software application

- **Are your different support channels talking to each other?** If different agents on your support team all too often tell a customer one thing via chat and something different via email, it's frustrating and confusing to the customer. A support software solution should be the single source of the truth for all customer interactions with information that is visible and accessible to support, sales, and product development teams to foster consistent messages.

What is the level of interaction between support channels?

Multiple uncoordinated support interaction methods

Informal or manual coordination of disparate support interaction channels

Single system coordination of all support interactions

▪ **Is there an uptick in negative agent reviews and comments?** Negative agent reviews and comments can fluctuate, but when they start feeling like the norm, it is a warning sign that your B2B support software is not enabling agents to respond in a timely and efficient manner. Customers will express dissatisfaction with support when they are frustrated with response times, or worse, their issues seem to disappear into a blackhole and never get resolved. This is especially true if complaints are continually being escalated to the executive level because it's the only way they can get resolved.

▪ **Are agents frustrated with support workflows?** If a support team has high turnover and poor collaboration, it's a major red flag that your support software is probably making internal communications difficult among internal team members. Support software should simplify and efficiently facilitate how team members from all departments work together and enable smooth customer interactions, not make it all confusing and frustrating. **It should also help create today's "superagents"—upskilled, empowered, and demanding autonomy and purpose.**

Another source of frustration is when your support team keeps getting asked the same questions and the solutions are well known because they have been done before. There are no channels for providing access to self-help resources, so customers feel helpless when forced to wait for support.

How do your agents view your B2B customer support in terms of efficiency and collaboration?

No collaboration among support agents

Informal collaboration among support agents

Limited support agent collaboration

System provides collaboration across all support agents

Integrated system provides seamless collaboration within / across departments

▪ **Can your current B2B support solution grow with your business?** Surviving as a business is rarely about remaining at status quo, and companies who have a "good enough" mindset are often left behind. Ensure your support software meets the needs of today but can also grow with your business through key integrations, automated technology, robust tools, and frequent upgrades and enhancements.

> *If your organization is merely focused on getting tickets closed as quickly as possible, consider a solution that provides the tools to enable a holistic approach to supporting your B2B customers.*

Five Crucial Steps to Follow When Choosing the Right B2B Support Software Provider

Now that you have chosen to take the leap to implement a customer support software designed specifically for B2B, how do you choose the solution provider that will be the perfect fit?

Here are five steps for how companies should go about choosing their new B2B support software solution.

Step 1: Establish KPIs to prioritize "needs" over "wants." Establish what you want to measure—your most important key performance indicators—first. This will help you know what features and tools you need in your support software solution, not just what sounds cool.

Some examples of the top B2B CX (customer experience) KPIs are:

Ticket resolution time: Keep in mind, this is different than merely closing tickets quickly. This KPI should measure resolving issues completely and to the satisfaction of the customer in a shorter time on average than before. It represents overall efficiency.

NPS (Net Promoter Score): Gives you an early indication of the satisfaction of the customer with one question, such as "How likely are you to recommend TeamSupport as a B2B customer support software solution?"

Top Agents: Benchmarking agents or reps creates healthy competition and, conversely, lets you identify those that may need additional nurturing.

When you are building your list of needs, don't forget to include current and future key software integrations.

[Appendix 1 at the end of this report gives an example of how one company compared vendors according to their internal needs and criteria.]

Step 2: Identify which B2B support solutions fit your needs. Look at review sites like Capterra and G2 for comparison information. Keep an open mind, because you may actually find needs you did not even realize existed. One common example, some companies use support software built for the B2C industry because they may not know there are solutions built specifically for B2B with the macro-level customer/company relationship in mind. Features such as visual support—the ability to attach images and videos to your support ticket—as another example, may not have deemed a need initially but can become one once you realize they help streamline support operations.

Step 3: Determine a budget. Collaborate with your finance leader to set a budget that will take you through the entire transition, from discovery to implementation and onboarding. Remember that it is not only about the platform cost, but about revenue retention (as a result of reducing churn) and revenue growth potential.

> *When you are establishing your B2B software solution budget, consider not only platform cost, but also the revenue retention (as a result of reducing churn) possibilities and revenue growth potential. In other words, build in a projected ROI.*

Step 4: Ask software providers for a demo. You may already think a B2B support software provider offers what you need from reading its website, but nothing compares to an actual live support software demo with a product expert. They can frame how the software will meet your business needs and will get you started down the road of implementation and solving your pain points. Make sure they are actually listening to your needs and answering your questions, not just running through a standard demo. Ask them to demonstrate specific types of customizations according to what you will want to do.

Even better, if there is a free trial period, take advantage of that so you can experience the solution yourself.

Step 5: Always read the fine print. This is an important step for people new to buying software, and they often skip it. When you get a proposal or contract from a support software provider, be certain you are getting the price and features promised. Some support software companies will attempt to "lure in" customers with low prices, saying their solution has everything to meet the needs of your customers. But it may not be able to meet these needs at every price tier, and end up charging you for support, implementation components, knowledgebase access, to name a few—nickel-and-diming in a sense. Look for auto-renewals and notice time for cancellations so you are not stuck with a software product you are unhappy with for another year.

How to Ensure a Successful Implementation

Once you have chosen a solution and you are ready to start the implementation process, here are a few things to do to manage the process and ensure a successful implementation for everyone:

Define and Outline all the steps involved—from technical to training—and create a timeline for each task. Then prepare colleagues, stakeholders, and vendors for their respective components that drive the implementation. Neglecting even one stakeholder in the process can throw off your entire implementation timeline and may even put the project at risk.

Include the following:

- Key milestones
- Tasks leading up to milestones and names of participating stakeholders
- Risk factors or speed bumps that might occur and how to avoid or mitigate them

> *Communicating a robust implementation plan across the organization will engage everyone in the company, even if they are not a direct user, and save you time in the long run.*

Organize existing assets and get them ready for the move. Most companies have existing information they want to migrate over from their legacy B2B support software. Examples include knowledgebase articles, product documentation, FAQs, customer and contact data, historical tickets, product/version information, and inventory. You want your support software to be the hub your team works out of, so it needs to be the home for all the information they need. This is also a great time to review and refresh content, such as self-service articles, and place priority on content that is frequently used and referenced by agents.

Remember, data migration is no small task and is often the cause of most delays. Steps related to customer data migration (or integrating with a corporate customer data warehouse) should include the following as a few key examples:

- Case and transactional data—what to keep, what to change, etc.
- Support content migration—formats, refreshes, etc.
- Integration with other systems, such as Jira (development), Salesforce (sales and marketing), etc.

TeamSupport B2B Customer Support Software: Onboarding and Beyond

Up until this point, this eBook has provided a general guide to determining if now is the time to change your B2B customer support software, what to look for in a provider, and how to prepare for implementation. In the next few sections we will focus on what to expect from the onboarding process, the importance of your CSM (customer success manager), and tools and resources available to you to get the most benefit out of your solution, all from a TeamSupport perspective.

Focus on Success

Once we have officially welcomed you as a TeamSupport customer you will be assigned a dedicated customer success manager (CSM), who will focus on—you guessed it—your success! The goal of your CSM is to help each member of your B2B customer support team be better at their job and provide your customers with better service.

> *The key to ensuring your success is for your CSM to be proactive, keep the lines of communication open, and be easily accessible.*

Proactive Approach: Your CSM will take a proactive approach to the relationship. They will begin by participating in the onboarding process with your team. This is not a one-off event. They are with you every step of the way for the years to come to give your team the tools you need to succeed, whether that's a refresher on a newly adopted feature for your team or onboarding for new team members.

Open Communication: From there, your CSM will have a quarterly scheduled call to answer any questions you have, follow-up on any past issues that might still be outstanding, and, most exciting, offer tips on how to maximize workflow efficiencies and cost savings.

Easy Access: Part of building solid relationships with our customers is to really get to know you. This means using the tools within our system to see the history of your tickets, anticipate where you may need some extra attention, and have a pulse on your business, including how we can help you scale. In other words, we are super-sleuths uncovering all clues! That way we can get right down to business on our calls and make the best use of your time. But sometimes, unanticipated, and more complex issues may arise—it's the nature of B2B customer support. In those cases, we're here for you. We welcome you to reach out to your CSM directly.

TeamSupport Onboarding Process

To ensure a successful implementation of TeamSupport, you will have a designated Onboarding Specialist who will work closely with your team throughout the onboarding process.

Onboarding Curriculum:

System Administrator Training – Based on your team's needs and objectives, instructions will be given to the Admins of your TeamSupport account on how to configure the main components of your account to accommodate your business and workflow. Instruction and best practice advice will be given on how to set up email integration, custom properties, SLAs, custom fields, and any planned integrations.

Configuration Review Meetings – After the System Administrator training is completed, we will have regularly scheduled meetings to review the progress of your account configuration. Challenges or issues encountered with the setup or use of TeamSupport will also be discussed. We will work to resolve these issues in a timely manner in anticipation of a successful Go Live.

Post Go Live Follow-Up – We want to ensure that you are experiencing success using TeamSupport, getting the greatest benefit out of the platform, and receiving the resources and personal support needed to make your experience with TeamSupport a great one.

> *Your TeamSupport CSM is your champion, advocating to add a new feature that you are requesting or working alongside the development team to solve a problem.*

Tools and Resources to Get the Most Out of the TeamSupport Platform

You should now be eager to dive in!

Our TeamSupport Information Center is a great place to get acclimated to all of the tools and resources that TeamSupport makes available to its customers. Find it at https://help.teamsupport.com/

Many, if not most times, it is more time efficient for you and your agents to solve simple issues yourselves, rather than submitting a ticket, sending an email, or calling support. And it's certainly more empowering! Explore all of the tools and resources available to you to make the best use of your time and get your customers' issues resolved more quickly.

Knowledge Base: The TeamSupport Knowledge Base is populated with different types of content on a wide range of topics, from "*How do I...?*" to solutions for unusual issues. Many are based on support tickets that we've received and helped customers resolve and you will find your answers there more times than not.

Community: Sometimes, you want to learn from your peers, someone who has experienced your exact issue and how to solve it. Or, you've learned a cool trick and you want to share it with others. All of that can happen within the Community section (a TeamSupport user group of sorts) where all types of product discussion are strongly encouraged. Even better, our own product specialists monitor this forum and join in the discussion.

TeamSupport University: Never stop learning! On the fourth Wednesday of each month, TeamSupport product specialists host a 30-minute live webinar demonstrating the various features of the platform. You and members of your support team are encouraged to attend as often as you like. Register for the next one and watch previous programs on demand on the TeamSupport University web page https://www.teamsupport.com/b2b-customer-service-university.

Customer Hub: All of the self-help pieces come together for a complete picture in the TeamSupport Customer Hub located at support.teamsupport.com.

[1-2]Leggett, K., The Three Customer Service Megatrends In 2020, Forrester, publ. Jan. 14, 2020, updated Mar. 19, 2020.

> *Once you become a TeamSupport customer, it doesn't stop there. We offer regular, personalized outreach through dedicated Customer Success Managers, a wide range of self-help tools, and a robust library of educational resources. All focused on helping you provide the best B2B customer support to your clients.*