Expert Chat 2.0 – Process Overview

Expert Chat Process Overview

Customer initiates Expert Chat

Incident Open?

— Yes → Incident Assigned?

— Yes → Assigned Engineer Available on Bold360

— No → Update the Incident AND Offer a Callback

— Yes → Warm Handover

Incident Assigned? — No →

Incident Open? — No →

Correct Area?

— No → Warm Handover possible?

— No → Create/Update incident, summarize the session in handover memo

— Yes → Warm Handover to Correct Area

Correct Area? — Yes → Verify EUPD flag for restrictions

Session Moderation

Analyze the issue / Collect information / Call to customer

→ Screen sharing / remote connection?

— Yes → Create Incident → Screen sharing / remote connection → Provide findings / solution

— No → Provide findings / solution → Create/Update Incident

Analyze the issue

A **deep dive is not necessary** through a Chat session. Analysis can involve the following:

1. Bug - Error Message -> steps to reproduce to get the error

2. How- To Question (Search for documentation, in WIPS check KM section)

3. New Requirement / Enhancement Request (direct customer to channel / community / Influence and Adopt Portal)

4. During the analysis phase assess every 30 minutes to determine if you are able to resolve issue in the session:

    ▪ Yes: continue assisting customer and resolve

    ▪ No: move to Collect Information

Please Note ⚠

Our goal is to find the correct path to provide the best customer experience , consider best suited channels (if not chat):
- SaE
- Incident
- CIC
- Consulting (SAP Note: 83020)

Collect information:

Working on complex issues means further analysis will be necessary or development input is required. These steps cannot be completed during real time interaction with a customer. Determine what additional information is required to continue your investigation before wrapping up the Chat session:

▪ Steps to reproduce with screenshots / Exact error messages in text form / Performance would have to be captured

▪ Logs and traces generation performed with customer on the session adds value and can be added to summary / action plan

▪ Authorization and Support Access should be checked, it adds value not to have to request these in a "Reply to Customer", do it now

▪ OnPrem. Engineers also should get an Architecture diagram at this stage to add value (OS / Versions of Products/ 3rd party)

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┌─────────────────────────────────────────────────────────────────────────────────┐
│  ┌──────────────────┐      ◇ Screen sharing ◇      No    ┌──────────────────────┐ │
│  │ Analyze the issue │─────▶│ / remote          │───────▶│ Provide findings /   │ │
│  │ / Collect         │      │  connection?      │        │ solution             │ │
│  │ information / Call │      ◇                   ◇        └──────────────────────┘ │
│  │ to customer       │                                                            │
│  └──────────────────┘                   Session Moderation                        │
└─────────────────────────────────────────────────────────────────────────────────┘
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Screen Sharing / Remote Connection

Screen sharing / Remote Connection is applicable for the following situations:

Always create an incident before screen sharing or remote access to customer system since customer bulletin information is not visible in the Expert Chat Board yet.

- Based on customer request and no EUDP flag
- It helps to make further understanding of issue easier
- With the customer online it is simpler to demonstrate and explain
- Capturing the screenshots and/or logs during chat aids investigation
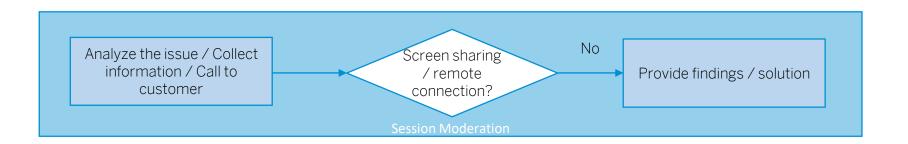
Is not applicable for the following situations:

- Customer bulletin has screen sharing / remote connection restrictions
- Customer declines screen sharing / remote connection
- EUDP flag set and you are outside EU
- Browser restrictions do not allow it or blocked

Please Note ⚠️

Screenshots must be authorized by the customer

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Session Moderation

[Analyze the issue / Collect information / Call to customer] → <Screen sharing / remote connection?> --No--> [Provide findings / solution]
```

Provide Findings / Solution

Findings

- Findings are either an analysis of the investigation or the finding of the bug itself correlated with the **KBAs / Notes**
- Summarize an explanation of what was discussed
- Set expectations with the customer on next steps, identify all actions and dates that these will be completed

Solution

- When the solution is found during chat, share the solution with the customer and discuss next steps

> **Please Note** ⚠️
>
> Exit criteria from moderation process (Session time):
>
> - New bug
> - Reproducing needed
> - Root cause analysis
> - Cloud Operations
> - Issue solved
> - Wrong component area

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┌─────────────────────────────── Session Moderation ───────────────────────────────┐
│                                                                                    │
│  ┌──────────────────┐      ╱────────────╲        No      ┌──────────────────┐      │
│  │ Analyze the      │      ╱ Screen      ╲───────────────│ Provide findings │      │
│  │ issue / Collect  │─────│  sharing      │              │ / solution       │      │
│  │ information /    │      ╲ / remote     ╱              │                  │      │
│  │ Call to customer │      ╲ connection? ╱               └──────────────────┘      │
│  └──────────────────┘       ╲───────────╱                                          │
│                                                                                    │
└────────────────────────────────────────────────────────────────────────────────┘
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Change Log
Secondary title if needed

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Reilly, Ruth; Rodden, Stephen; Nagy, Janos; Sipocz, Eszter; Iturbe, Lucia; Maier, Bernd; Park, Jung In Kumar, Santhosh; Tang, Claire; Murray, Chris H	February 21, 2019	▪ New document for Bold360	Released
1.1.0	Melinda Ludanyi	April 10, 2019	▪ WIPS 4.0 Initial Document	Draft
1.1.1	Lisandro Magnus	November 22, 2019	▪ Document template Update	Released

INTERNAL