22.03 NA WEBR - From Singals To Action

## **Martin Schneider**

You are in the SupportLogic SX platform. We're going to be showing you that in a little bit and talking about how SX predicts takes customer signals turns it into actions.

Let's get into the agenda really quick. The growing importance of investing in support experience, I'm going to talk you through a few things about how important it is to invest in your support experience.

A lot of market shifts are happening. We'll talk about overcoming the obstacles. There's a lot of things going on beyond just the global pandemic that are really making it difficult to transform your support experience for your customers.

We're going to talk more about that. We're going to talk about what is signal extraction and go through a quick idea of what that means. And then Jono is going to take you through SX predict and talk about what that means for you and how you can get started on that, but really talk through some of the features and then we'll take your questions.

But before that, I did want to take a quick poll of the audience and figure out, just get a baseline line of what tools you're using inside your support organizations or for your case management, how are you taking customer issues and how are you tackling them?

So let's bring up the poll now.

## **Jono Williamson**

Should be on your screen there. It's like everybody is using a CRM ticketing system, Martin, 100%.

## **Martin Schneider**

That's awesome. That's good to know. One of the great things about SupportLogic is we actually work very, very well and very quickly in the cloud to extract from CRM systems.

So, okay. Let's move on. There's a lot of stats I could go through here and I'm not going to go through every single one of these, but the simple fact is you've probably seen a lot of different types of statistics like this, where especially in B2B, customers are expecting more, they expect a more proactive experience than a reactive experience.

And the problem is that a lot of us are stuck in reactive break fix models. The majority of customers across B2B and even especially in B2C, just are expecting more as we talk about things like AI and being predictive and predictive analytics, we need to start applying that to our customer support experience for our customers, because at the end of the day, especially for B2B, support experience is critical to revenue.

When you think about the landing new customers in this new world of software as a service, cloud product led growth, some people are logging support tickets before they even become a customer.

And you need to give them a great experience early on so that they become a subscription customer of your software or any other service that you expect them to renew year after year, the expands side of things.

If you're trying to expand on revenue, get new users, if you're a SaaS application or new modules, if your hardware or software, it's really, really important to have a great support experience because that's the brand image and the product adoption and understanding all of that along that you just need to use those insights to make sure they're happy or else they're not going to buy more.

And of course, very linked to that is if they're not expanding, you are on the risk of not retaining them. And in this subscription economy world retention is everything, for a lot of those big global multi- billion dollar SaaS companies out there.

If you look at their annual revenue more than three quarters of it sometimes is coming from existing customers, not new customers. So retention and expansion revenue are critical.

And in B2B, the front line isn't in marketing and out there on social media and you're messaging, it's inside the support center is where the real voice of the customer and really where those most important interactions are coming, because that's where it's down to the product usage and their experience with the product.

And when it comes down to it, what we see and our mission at SupportLogic and our vision is understanding that companies can only grow and protect their revenue if they understand and act on unbiased customer signals from every service interaction in real- time across all sources.

Now that's a big statement and it's a very bold statement in saying, this is the way we can transform support from break fix reactive models to proactive and predictive models.

And the idea is really taking this as a guide point and saying, we need to move forward. And customer signals is really the linchpin for that. We're going to talk a bit more about that.

Because like I said, there's a lot of challenges. We know you're dealing with a lot, if you're a support organization leader or a customer success, or even a chief customer officer these days, it's still a lot of firefighting versus proactive support because data is stuck in silos.

It's really hard to take that information, pull out the signals that we're going to talk about and start to take action on them before they become critical, before a customer escalates, before they're a churn risk.

And because that data is stuck in silos, or you might be using survey based approaches for voice of the customer, they're typically biased, they come from after a resolution where the customers sometimes in the support resolution paradoxes, they're happier theoretically, or give better results than they would if they never had a problem with your product.

So they're not really reliable. And they're small samples of your subset. You need to look at those signals across every customer, across every channel of interaction.

And we're looking still at the support center as a cost center and trying to reduce that to zero instead of investing in it as a critical part of not just support experience, but the customer experience as well.

And a lot of times, especially in B2B, we're focusing on the wrong metrics. When you think of the complex relationships and the years long relationships, especially now in the subscription economy people have with your products.

It's first call resolution rates become irrelevant, when you're really thinking of a relationship and the multiple back and forths you have, you almost don't want a first call resolution, because you want to get the right people involved.

You want to learn, you want to do almost discovery across that. So we're thinking about things the wrong way. We're going about it the wrong way in a lot of ways as we try to move towards much more predictive and proactive support, a lot of challenges, we understand that.

So the point is to make it easy. Because you need to be able to read and act on those customer signals. I think it was like" canary in a coal mine," that's a cute analogy where they have the canary down there and if the canary starts falling over, that means something bad is about to happen.

And when we think of customer escalations, customer churn, those are bad things. But if you have the signals, if you're reading the signals ahead of time and looking at them, and it's not just in a single case and these things don't happen in isolation, they're a trend rising over time.

If you're pulling out the signals and reading them in the context of every customer relationship, you can be proactive, because if you're missing those signals, you're wasting resources.

You're spending too many man hours on being reactive and firefighting, you're increasing your cost because you have to throw people at the problem, not technology, which can be a lot more efficient.

And of course at the end, it's lost revenue and decreased customer satisfaction, which is never good for the stats that as support leaders, we want to be judged upon.

And it's really about that unbiased insight into the true voice of the customer, I mentioned earlier like what are customer signals? What do they tell us? They tell us that customer sentiment in real time, how are they feeling?

And again, it has to go beyond surveys, surveys are very biased in terms of what we get out of them, they're typically a small sample set. You really want to get the holistic view.

You want to predict when customers about to escalate or churn because that's you want to be proactive. You want to get ahead of them, so that they're not in a situation where they think you don't care or you're just completely miscommunicating.

You want to get ahead of any potential problem, especially when we think of B2B software and hardware and networking, these are multiyear multi- million dollar relationships. Losing one is really terrible for the organization, let's try to keep churn at a minimum and really looking at account health and feeding into, where support can feed areas like customer success and renewals to understand really what is the account health, being able to pull signals out that aren't just about the performance of the support organization, but really about product usage and expectations that the customer has that go beyond just their interaction with the support agent.

It's a much more holistic view. And then thinking about what are recurring issues and customer and product trends, how do you start pulling out from the support organization requests for features and other things that might optimize, not just your product roadmap from a feature set, but also, how do you optimize cloud delivery or security or any other things that your customers are asking for that typically gets trapped in those silos inside the sub panels and notes of your CRM system.

So we're here to help, that's lot of doom and gloom, you got to be acting on these signals, but the great thing is that, we're a true voice of the customer. We're looking at every interaction across the life cycle, and we've seen customers reduce churn by about 25% using signal extraction, which we're going to talk about.

We're built primarily for B2B. We understand and Jono will talk a bit more about the out in the demo portion, the language of B2B, the interactions, it's different than B2C and it's important to understand that nuance and we're purpose built.

So we're really, you're not doing a lot of work to get it up and running and we understand what it means. So we're reducing escalations by 40% because we're quickly understanding what a B2B escalation looks like.

We have dynamic workflow, we're working with those CRM systems that you use every day, ticketing systems, whatever you want to call them, the sales forces, the Zen desks, Microsoft dynamics, things like that, which means that we can take these signals to action just like the title of the webinar suggests.

So you're looking at on average and we do a lot more than this usually with our customers is a 25% reduction in meantime the resolution. So by being able to take action on these signals earlier than normal, when it becomes a nuclear escalation, we're reducing how long it takes to resolve cases.

And of course, because we're a cloud solution that just overlays on your CRM or ticketing system, ingest that data reads the signals and allows you to take action. We see really fast, impressive ROI.

It's 30 days usually for people to start seeing real results. So it's an easy button for going from reactive to proactive.

We've got a number of applications where we can take that signal extraction and basically improve your support operations, your escalation management, customer growth and retention, and also agent coaching.

We use those signals to understand the agent. And Jono is going to talk about that and how the core signal extraction that really lives in our SX predict product really moves.

And like we said, we're sitting on top of the systems you use every day, pulling that into the platform, reading those signals, making recommendations, making predictions that you can quickly take action on.

So with that, I want to turn it over to you, Jono because seeing is believing, and we want to jump into a bit of an explanation of signal extraction, how it works, what it means, what are the nuts and bolts around it?

And then we'll show how it works in the product and you're seeing a screenshot of it right now. Ooh, then we'll go in.

## **Jono Williamson**

Alright, man, if you stop sharing, I'll share my screen.

## **Martin Schneider**

It's not letting me, hold on. Let me see. Why is it not letting me do that? I'm having an issue with that. Sorry.

## **Jono Williamson**

You've given up control to the gold cast platform. It'll never let you stop now.

## **Martin Schneider**

Yes, let me see if I go here. There we go. There's a little tiny button there. Okay.

It's all yours now.

## **Jono Williamson**

Alright. You got it. I'm going to take you through one slide to explain how our platform works and then I will show you our platform.

So let me see, am I sharing the right screen Martin?

## **Martin Schneider**

I'm seeing it. Yep.

## **Jono Williamson**

Okay, great. Hi everyone. Good morning, evening or afternoon, wherever you are. Just a reminder. There are two ways to ask us questions. There's a Q and A section on the platform as well as a messages section.

The Q and A, everyone can see the questions you ask, the messages you can send them to us privately and we can get to those at the end there, if you have any questions and if you like what you see, you can also send us a message and we can contact you and give you a full form demo.

Martin was talking to you about signal extraction, and I'm going to show you that inside the application, this is a graphical representation and PowerPoint of what we do. Martin mentioned that we connect to your CRM ticketing system and we read all the back and forth messages between your support engineers and your customers.

So here's a back and forth message example between support engineers and a customer and inside here are signals. And you could read that and see that.

But our application uses natural language processing to identify 30 different support related signals. These are 10 examples here on the right hand side.

And we look for signals such as is the customer using language such as they're indicating it's a critical issue, it's urgent, frustration in patients etc. So again, 10 examples, this uses natural language processing.

Well, it's not keyword searching. It's understanding the language that they're using and the context of the words that they're using to identify these signals. And primarily this is what I'm going to be concentrating on today and show you how you can take action when you see these signals or when we identify these signals for you.

I'll keep going in the slide and show you some of the other things that we do, which we won't be concentrating on today, but just in the back of your mind, the other things we do. We also look at the engineer signals as well. Like, are they sending empty updates?

Are they summarizing the problem for the customer? We also do keyword extraction as well. When we have a prebuilt ontology library that you can append to and add your own keywords, your product names, skills you want us to look for, product names, error codes, etc and we can extract those.

You can look for trends inside of your support cases. You can look for support and product trends. We also provide an attention score and a sentiment score on every interaction that changes as more interactions as more messages come in and I'll show you that inside the tool today, this is very interesting because the attention score is calculated based on the signals it's seeing.

And I'll talk about the other things that affect the attention score and the sentiment score is based on signals as well. And we'll do future webinars to talk about how our escalation prediction works.

We have five different AI models or machine learning models that identify cases that are likely to escalate. We also have five different ML models that identify the right engineer to handle a particular case.

And we do use natural language processing to identify signals that a customer might churn. You can churn left hand side here. We are considering migrating to a competitor even we can put in your competitor names inside our ontology library, and that could trigger or even someone saying I'll never do business with you again, that's a signal that we could identify.

So let's take a look at the application here and I'll show it to you. I'll just change screens here and go into full screen. So this is what the support logic application looks like. And we break the signals into two different areas.

We look at negative sentiment type signals, and we look at needs attention type signals. So negative sentiment signals are that are just that they're sentiment signals such as negative sentiment type signals or impatient signals, confusion type signals.

So you can see the each one of these tiles here represents a case. So we've got a case here where a customer said this was too long and it was unacceptable, so that's a negative sentiment.

This is impatient saying, I told you this already. So we're calling this out to a support manager effectively, what this console is telling you those needles in the haystack, those cases where customers are expressing negative sentiment, you can see it, you can open the case, review what's happening and see if you want to get involved in this particular case.

In fact, you can see there are other signals in this case here as well, where the customers actually done set follow up requests as well, two follow up requests in this particular case.

So here you can open it up and take action. I'm going to show you can take action in just a second in another case. Here on needs attention, I've got this broken up by signal type and you can see there's two cases where we've identified the language, where there is a critical issue.

And you can see the language that triggered that critical issue says because downtime will cause severe impact to our customer's business and the customer it's Buffalo bills here.

Again, calling that out. So these are those needles in the haystack that is a support manager. If you're going along your day, you can see these on a dashboard. You can even get alerts for these.

So you may not even be logged into our application. You get an email alert, a slack alert, or teams alert, and you could just click on the link in those alerts and it'll bring you directly to the case.

You can review that case and take action. So let's open up this particular case here where the customer said downtime will cause severe impact to our customer business.

So here, when you open the case, you can see everything associated with that case that is inside your ticketing system, and you can interact with it. And any interaction will go directly back into your ticketing system in real time.

So if you look at this case, you can see the person who raised this case, your customer at the Buffalo bills is Matt Milano. And your engineer that is working on it is Russell. So Russell hasn't responded to this case yet, you can see the customer's messages come in, at the top here you can see the sentiment score is 70.

The reason if you hover over it by the way, you can see what 70 means. And 70 is in the neutral zone here. The reason why that's neutral is there's no sentiment detected in any of this language.

The only thing we've detected is this critical issue and that's not sentiment, that's why this is at 70. But the needs attention score if we hover over that, we can see that's the third highest range.

So what causes the needs attention score to be high is that we have detected a signal that it's a critical issue, that causes the attention score to go up, but also what causes the attention score to go up is the fact that this customer has sent us a message and we haven't responded to that yet, so that causes that needs attention score to climb.

So now you're able to see messages where you can see cases, where you have either low sentiment scores or higher attention scores, and you can get alerts on these things as well.

So now as a manager, if I'm looking at this particular case and I can look through the data here, and if I think that I know somebody who can help Russell solve this case quicker, I can invite that person to get involved and solve that case.

So I can just invite somebody really, really quickly here. And I can say if I know a really is somebody who may be not even a user of the ticketing system, really it might be someone who works in and she might be a developer.

And I might say, can you help Russell with this case.

We connect the slack team as well as email. In this case, I'm connected to slack. So I really just got a slack message from me with a link to this page, asking if she could help Russell with this particular case.

So we're really, we'll get that link. In the meantime, I want to let Russell know that I really is going to help Russell with this particular case. So I'm going to say, Hey, Russ, I really has seen this issue before and she can help you solve this really quickly.

So when I send this to Russell, this is going to instantly go back into the CRM, into the ticketing system. And that's going to go instantly back where Russell can see it, because Russell's not using the system.

This is a tool for managers and Russell's going to get that message. And he's going to know really is on the case. And by the way, you may have noticed a really answer already. And she said, she's happy to help.

And that's come up in the system. What you can also do is leave a message for the customer and bring Matt's temperature down and say, Hey Matt, I'm a support manager here.

And I notice you're having a critical issue here. I've got one of my top developers are really helping Russell solve this, please stand by. That tool will go back into the ticketing system and the ticketing system will send that out to the customer.

So always updating the system of record. Now when I really click on that link and she opens up this particular page here, she too can add case note or even reply to the customer.

She doesn't even have to be a user of the ticketing system in order to interact with the case or the customer. And that too will also go back into the ticketing system and update the system of record.

So in fact, what we are doing here is we're not just calling out those needles in the haystack, where there are critical issues, production issues, where we are seeing those signals from the customer, or we are seeing sentiment signals from the customer.

We're giving you a workflow tool where you're able to invite other people, swarm around those issues and solve them fast before they become even bigger issues.

And the customers are getting even upset, and you can mark that you've worked on it and then move on to that next critical issue or the next issue where someone's indicated that it's urgent, etc.

So in a nutshell, that's what our application does. I'm going to stop sharing here and actually I'll go to the PowerPoint and we can go to the Q and A section, I'll go back here. Martin, are you there?

## **Martin Schneider**

I am. Are you still sharing? I still see your screen.

## **Jono Williamson**

I'm going the Q and A slide.

## **Martin Schneider**

Perfect, great. Before we get into the Q and A, I just want to point out as someone who is a longtime veteran of the CRM industry, the way that those products are structured in terms of your access to data, even as a user versus your access as a nonuser to the information and the insights in them, SupportLogic unlocks that.

When we talk about signals to action and what Jono showed with the slack integrations, or if it's Microsoft teams, whatever you might be using for collaboration, being able to get that information to anybody in the company is really amazing to me, and do that in a way that you don't have to add, is it Salesforce?

Is it Zendesk access? Take the cost out of the equation of having to add, read only, or full user licenses, but just the speed. People can get into the system and authenticate using your single sign on in seconds and start taking action.

So that's warming capability to really provide expert insight to solve problems quickly, it's just unparalleled. And then secondly, by bringing those signals and the context that they came from, right to the front of a manager, or even an agent, depending on the use case across our product lines, it's really, really cool rather than going in the CRM and hunting in those sub panels.

And then the note attachments and the email attach, trying to find that you talk about needle in a haystack, it's like a needle in a needle stack, and trying to find the right needle you're looking for. So it becomes even more of a productivity driver for any user to find that information because the signals drive that contextual relevance right to the front, and you're not hunting down information, so it's productivity, but it's also access and just broadening the scope of the reach of the support experience to experts in the organization without complexity and cost, which is really, really cool.

And Jono you showed that really, really well. And I think that's, that's a huge difference, especially in the audience who are using those products that have a great value as a system of record, we're bringing that system of intelligence and that force multiplier right on top of it.

Alright. So let's move into Q and A.

## **Jono Williamson**

Yeah, we've got some questions came through the private message thing. So I can ask those. And just a reminder you can send messages privately or publicly through the Q and A.

I've only shown like one very small piece of the platform today, if you want to see more of that piece or more of any other pieces of the platform, please send us a message or contact us. And I'll be more than happy to show you a longer form demonstration of the application.

The first question that I've got, I can see here is, how much time does it take to train the NLP model, the natural language processing model.

So Martin, you can expand on this, if you want to, I'll take the first shot of this.. As Martin mentioned earlier on, we understand the language of B2B customer support.

So out of the box, we have a model there that picks up sentiment. It picks up signals. It's really, really great. However, what we have with our customer is there's always unique things to customers and unique things that are going to be a critical issue, unique language it's like, Hey, this era is a critical issue inside of the application, whenever you see any text inside of a message, you can highlight that text and you can say, Hey, if you see this sentence again, this is critical issue, or this is negative sentiment.

This is positive sentiment. And that trains a model that gets routed to one of our data scientists, our data scientist does all the work around that to ensure that we recognize that again in the future.

So all you have to do is highlight it, tell us what it is and acknowledge, and that gets routed to us. And Martin if there's anything you should want to add to that.

## **Martin Schneider**

No, I think that's great. Obviously, we can do a little bit more from the services perspective working on the model, but really the great thing is that it's great out of the box.

And like Jono is saying it trains itself with your input. So the more you're telling him what to do. It learns and learns and learns, itself learns and becomes more and more accurate, which is really.

## **Jono Williamson**

I think the next question we've actually just answered, actually it was, what about language that is unique to our industry? Can you train the model to recognize that? And I think, that's we expanded on the last question.

So yes, we can do that. You can just let us know what that is. The next question is how long does it take to implement?

So that's a really great question because effectively, we are just taking data out of your CRM application and we're putting it into a private virtual cloud, your own instance.

We're not a multi- tenant, so which your own private instance, and it takes us about four to six weeks to implement the application. There's not a lot of work to do on our side because we're effectively just mirroring your instance, right.

And the data that you have, so it's about four to six weeks. During that time, there's not a lot for our customer to do. We do all of the heavy lifting on our side.

We ask you to do about, I think at last count, it was about 11 things that we ask you to do during that process. And none of those things typically take more than an hour.

One of those things is, okay, we remember during that slide, I said, we do keyword analysis and allow you to do trend analysis. We ask you to append that ontology library and fill out a spreadsheet with any keywords you want us to look for.

So that's one of the things we actually ask you to do and typically it doesn't take our customers very long to give us list of products and keywords they want us to look for. Martin is there anything you want to add to that?

## **Martin Schneider**

Yeah, I think that's one of the longest ones, we timed it at one point at like between six and seven hours of total get started time on the customer side.

One of those things coming from again CRMs where you sell it, what's called an empty database or whatever you want to call it, you've got to do lot of configuration.

What your users, your roles, your access controls, all those workflows, all those types of things. We just turned it on for you. It's very white glove. When I came to the company eight months ago, I was shocked at just how much we do for the customers.

And it's great for the customer, but it's really amazing that the level of service we provide to make it completely seamless to go from typical CRM deployment without any intelligence on top to start pulling those signals out, reading them and taking action on them.

So usually, like you said, between 30 and 50 days, we're getting those initial reads going and getting people into the system and the managers are looking at the signals and they're starting to take and say, okay, this is good and starting to do those things, like we said, of even training the model.

And it's really exciting to see how fast people can get started.

## **Jono Williamson**

I think we can do the next two questions together that says. Do you replace our CRM? And how do you integrate to our CRM? So we do not replace your CRM. We need that CRM to be there.

And the way we integrate is really interesting. It's very simple. The way we integrate to a CRM is we ask you to create a read only user inside of the CRM.

And that read only user we use to pull the data into our application. We use a service, a data pipe service that uses that user, that we do not store any data in that data pipe service, it's called five trend.

We're also one of our customers. We pull that into our private cloud. The way we write back into there is we ask you to install a plugin into the CRM, and that allows the right back into the system.

So it's a very, very easy integration. It's funny. A lot of times the admins, the CRM admins start freaking out when we talk about integration. And as soon as we explain how easy it is, their temperature goes down quite dramatically.

It's a one page that we explained.

## **Martin Schneider**

One page, little guide that we have.

## **Jono Williamson**

Yeah. That's the last question up there, Martin, unless let me just check to see if any came in the other page there. Well, I think we are good on questions.

## **Martin Schneider**

Excellent. Well, Jono awesome demo. What I love about SupportLogic is, it's super intuitive, what it does for the CRM data and the case data by aggregating it, giving you not just context, but obviously relevancy and also actionable insights, really huge, and that's the kind of core, that's the starting point of SupportLogic SX predict.

That's where the signal extraction is inside. It's where you get started. And it's super easy like we said, it's easy to get started pulling information from your CRM.

It's easy to get started seeing the predictions and the signal extraction and moving on from there to escalation management, to churn prediction, customer trends and analysis and things like that, which we also offer.

So thank you for taking the time with us today. If you have any questions, go to the website supportlogic. com. There's lots of ways to get in touch with us and we'll see you next time.

This is the first in a series as we go through each of the core aspects of the application set. So this one was on predict really, which focuses on the customer signals. And we'll see you next time when we start talking about escalation prediction and management.

Thank you everyone.

## **Jono Williamson**

Bye everyone. Thank you.

## **Martin Schneider**

Thanks all.