NA WEBR 03.21 TSIA Fivetran - Support and Service Convergence - B

## **Vanessa**

Hello everyone and welcome to today's webinar, A Real World Case Study: Unifying the Support and Service Experience With Customer Data brought to you by Technology and Services Industry Association and sponsored by Support Logic.

My name's Vanessa and I'll be your moderator for today. I would now like to introduce our presenters today. John Ragsdale, distinguished Vice President of Technology Research for TSIA.

Kevin Hodgkins, Vice President of Customer Success for Fivetran. And Krishna Raj Raja, Founder and CEO for SupportLogic.

As with all of our TSIA webinars, we do have a lot of exciting content to cover in the next 45 minutes so let's jump right in and get started. John, over to you.

## **John Ragsdale**

Well thank you Vanessa. Hello everyone and welcome to today's webinar. We're talking today about how to leverage artificial intelligence natural language processing to start really collecting some signals or doing some sentiment analysis of all of this data you're collecting about your customers.

So we've got a real world case study of this we're going to be sharing with you today. But we're also talking on about another topic that is near and dear to the heart of TSIA which is services convergence.

And for those of you who are not familiar with this concept, I wanted to give you a little background before we dive in. And services convergence means breaking down the silos between the various lines of businesses in the service organization of tech companies to ultimately deliver a better customer experience.

And it lowers the cost of service delivery, it improves the end- to- end experience for customers. But there are some challenges to doing this. And a lot of this is just the intractable service lines each with their own budget, their own P& L, disparate technology infrastructures that just really makes it difficult to break those silos down and start sharing some resources and data across these teams.

A couple of data points for you. We did a special survey around converge last year, 69% of companies felt that there was an overlap in their current services portfolio.

97% thought that there was definitely an opportunity to leverage some capabilities. Often some resources, you've got a lot of shared skills across the organization.

So we're going to be talking to a company that has started that process of converging some service groups in particular support and success.

So we're going to have a conversation with our panelists today but I first want to bring each of the men to introduce themselves and tell you a little bit about their companies and what they do.

And first up is Kevin Hodgkins who's Vice President of Customer Success for Fivetran. Kevin, welcome to the webinar.

## **Kevin Hodgkins**

John, thanks so very much. I'm really happy to be here today. So I'm going to start give you just a little bit of a background on Fivetran and a little bit about myself.

So I've been in the data space for a little over a decade and a 25 year career in technology but really focused on data over the last decade as it has become more and more and more important for companies to be able to be successful.

So Fivetran we allow automated data integration from many different source systems into cloud data warehouses or cloud destinations. We have a lot of prebuilt data connectors.

We aim to make data movement as simple and reliable as data is the energy that powers modern enterprises.

We also work with other software companies to provide an embedded and white labeled method of handling their customers data to power richer data powered features within their products for their customers.

And an example of this is actually Fivetran works with SupportLogic to help power SupportLogic's tools which we as Fivetran also use.

So what's our mission within Fivetran? We have different missions to different stakeholders. We have our missions for our board, our investors, for those of us within Fivetran.

But the most important of course is to our customers. None of the others happen without being able to properly service our customers. So our mission is really to deliver great experiences for our customers at scale as Fivetran is really in a great scale up story right now.

And we need to be able to empower our users to take full advantage of our platform and enable their organizations to drive more business value out of their data.

So we've had a couple of key challenges. I joined Fivetran almost exactly a year ago. Next Monday is my one year anniversary. And Fivetran has grown tremendously.

We've doubled our customers, we've doubled our revenue, we've more than doubled our employees over the past year. And another key thing that we've done is not doubled our customer success organization, we actually created our customer success organization.

Prior we had account managers that sat in sales that did a little bit of service for customers and we had a technical support organization. So we've come in and really brought together the support and account management, transformed into a customer success management group.

We added in a couple of other roles and we rolled all of that up to one business executive. And so we wanted to build that converge customer success function so that we could better serve our customers.

Real challenge trying to do that through COVID. So hiring to double your company to over 500 employees, a lot of work to do during COVID.

Also, balancing those business growth targets that we have versus the high service expectations of our customers.

We're pushing data through the lifeblood of businesses. So when there's an issue with the customer's data, we have to be all over it. And then last key challenge for us was really maintaining and further strengthening the company culture which is the core of what Fivetran is for our employees.

And of course, those great employee experiences lead to great customer service experiences when we have the right data and can make the right decisions at the right times.

One last thing I'll say here is our technical support or customer support organization. We highlight this internally all the time.

They communicate more with our customers than every other part of the organization combined. Over 15,000 support interactions with customers every month, the conversations going back and forth and every single one of these is an opportunity to create a great experience for a customer.

So how have we tried to do this? Well to create this customer success organization we came in and we talk internally about our elevate program. So we're, we're trying to build this experience driven framework for our business practices and customer facing methodologies.

Today, we're really going to focus on topics that surround customer insights and our modern support strategy. So the modern support or really modern service strategy for us is based on customer insights.

The two go together. The customer insights, that's all of the data that we have, all of what we need and it's what sent me on the journey that led me to SupportLogic as a tool to help us within LP analysis so that we could understand the sentiment and understand when customers need our attention.

That really helps us drive that modern support strategy which in part is converging the teams which honestly can't be done without data.

And modern support strategy for us is also becoming more and more proactive, operationalizing processes and utilizing tools that help us better serve our customers when and where they need us.

Last thing I'm going to share is that as we've moved through this journey over the last year, one, we have a new indicator that's very important to us and that is customer sentiment score.

Customer sentiment score is this operational thing that we look at, it's real time and we can judge how our customers are kind of feeling about us right now. And we can use that information to determine how we engage with customers.

And we're very happy that we have a high customer sentiment score. That operational metric when we're able to keep that high, that leads into a more traditional metric around service and that's customer satisfaction.

We were able to increase our CSAT from 90% to 95% over the last six months. We're very proud of that internally.

The team works really, really hard. We all know that service can at times be a thankless vocation but to be able to see the results is very positive.

When you have good customer satisfaction, customers are more willing to advocate for you. And we've also seen a significant increase in our net promoter score.

And then the business outcome for us is increased revenue. We are a company selling products to others and our revenue is very important.

And I wanted to highlight one thing that we tied very directly to our customer service and customer success organization.

And that is a significant more than 25% reduction and logo churn within our customer base. So John, thanks again for giving me an opportunity to introduce myself.

Hopefully I didn't go on too long there and I thank you again.

## **John Ragsdale**

No, no, that was great. And the numbers are really impressive and I love the concept of a customer sentiment score. And I'll talk about that more in just a minute.

But next I'd like to bring in our second panelist to introduce themselves. Krishna Raj Raja is the Founder and CEO of SupportLogic.

We've done a number of webinars and panel discussions together. So Krishna, great to see you again.

## **Krishna Raj Raja**

Oh thanks John. Let me do a quick introduction about myself and about SupportLogic. So I'm the Founder CEO of SupportLogic.

As John mentioned, we've done few webinars with the TSIA with some of our other customers. Fundamentally what SupportLogic is focused on is extracting customer signals from your day to day customer interactions.

That's what we are fundamentally focused on as a company. Once you extract signals from customer interactions, that signals is useful for measuring customer sentiment score, that signal is useful to measure the impact of your support on the revenue stream.

It's very useful to understand how your customer success team is performing in conjunction with your support team. It is useful for our product teams. So the signal has lot of benefits that often goes beyond the support organization.

So that's what we are focused on as a company. And the way we do it is through connecting to the existing systems of record any organization might have.

This includes your support ticketing system. It includes your customer success platform or any other platform where you may store customer interactions. So we have connectors, we've partnered with Fivetran for those connections.

And once we connected with the systems of record we can continuously pull signals in real time. And we use natural language processing and we use a combination of the metadata that is in that existing ticketing system as well as the natural language that is there in the existing ticketing system.

We've combined both and we provide unique insights and unique workflow. That's what SupportLogic does in a nutshell. Let me quickly show you how this is done.

So this is a sample ticket. What our NOP engine does is it scans to every interaction that you are having with your customers.

In real time, it pulls various different signals. Everything from why the customer is frustrated, what is the impact the customer is facing with this particular issue they're raising with you, what environment the customer is using your product, is there a challenge risk associated with this customer, is a customer giving you product feedback and product insights that's useful for your product teams?

All of this we extract in real time and dynamically for every customer interaction we measure the sentiment score. We also measure the attention score, the need attention score.

So this allows you to gauge the temperature of the customer but also allows you to understand what the priority of this customer interaction should be from your support and resources perspective.

So that's what we do in a nutshell. Great to be here and looking forward to chat a little bit more about the convergence topic that we decide to focus on here.

Over to you John.

## **John Ragsdale**

Well thank you very much. We're going to move now into our panel discussion. And I wanted to open the panel with a quick polling question. So you should see that poll popping up on your screens now and it's asking how converged are your support and success functions today?

And your options are there are completely separate functions today. Unfortunately I talk to a lot of companies that kind of have an adversarial relationship between support and success.

The next option, we are separate departments but we report into the same executive and that's a really good place to start your convergence. We're separate but we're looking for opportunities to collaborate and share information which is another good place to at least start.

And the final option, we're completely converged and unified function today which I'm anxious to see how many folks are in that category because I think that Fivetran is definitely a pace setter.

So I'm seeing the votes coming in. I'm going to give you just another few seconds to register where you are on your convergence journey.

And it looks like the votes are starting to slow down. So I'm going to go ahead and close that poll and push the results out. And the largest number of you say that you are separate, you're looking for opportunities to collaborate.

35% you're reporting into the same executives. 11% say that they're completely converged today.

Only 13% say they're completely separate functions which to me is actually lower than I was expecting. So Kevin I think you're definitely the pace setter in this group.

I'm glad to see people are at least in that journey. And just a data point for you, this is from our customer success benchmark asking where are people pulling data for their health scores?

And the reality is that after a customer goes live, the support organization is typically the voice and the face of the company for the customer.

They're the ones that they're talking to as issues come up, as questions come up. And a lot of the ingredients and this health score has a very big line directly into support the conversations that you're having with them.

The highest percentage is adoption and you're now locked in those conversations and those case notes. That support is talking to customers about, they're complaining about missing features or something's hard to use or they can't figure out how to do something well.

So there's a lot of barriers to adoption locked in those support conversations. The second biggest component of a health score is the CSM disposition.

And let's be honest, success often acts as the escalation path for support issues. So they're hearing day in and day out about positives and negatives about dealing with the support organization.

And finally, voice of the customer data. And after a customer goes live, the majority of the satisfaction surveys, the voice of the customer info that you're tracking is from support interaction.

So I think clearly the more we can do to start seeing these two groups work together, the more successful that success can be which ultimately is impacting your revenue, renewals growth, et cetera.

So let's move into our panel discussion here. And my first question I want to ask Kevin.

You saw that earlier data, majority of companies see potential for converging service lines but as we just saw in that poll, a lot of folks really haven't gone very far. What prompted you to do this at Fivetran?

## **Kevin Hodgkins**

So I think what really prompted it was the experience of our customer success executives that were brought in. And a view from the overall company that these functions were all different facets of serving the customer.

In my own experience I've worked at places where the groups are completely separate, even feeding up into different executives. I've worked in places where basically across the four examples that you had there.

And I've learned from those experiences that the importance of bringing these together, being able to reinforce what each group does provides a better experience for customers.

And it's not easy. It's easy to think of it, it's not easy John to actually get there. And it is a continuing journey.

Just like we have our customers that have a customer journey and working with us we also have a journey to ensure that we become more and more aligned within a converged organization.

Things that was really important to me that I experienced in the past is, and I think you mentioned it a minute ago but I'll just say there's friction between these different groups.

Converging them doesn't get rid of some of that natural friction but you can help turn some of that friction into more constructive friction.

It becomes less about finger pointing and more about how we can work together. And having that under one exec enables us to do that better.

Another key thing that we have to do is really make use of data to be able to bring these functions together.

## **Krishna Raj Raja**

Hey John if I may chime in there. I think Kevin you mentioned this in your opening segment that customer data is very important.

Insights is very important to unify these teams. And I want to echo that point as well. I mentioned this in my opening segment as well, support has data for everyone, support has data for support teams, product teams, engineering teams, customer success teams.

You can identify churn risk in support interactions. You can identify product features in support interactions. So bringing these different teams together by taking the data from support database.

But not just your metadata, metadata is very watered down. Doesn't always provide the insights that your other functions needs but once you apply natural language processing and you extract signals from it, that data becomes a common conversation between these different functions and the convergence becomes much more organic and natural when you put those shared data across.

That's what we have seen with our experience. I'm glad that that seems to be working very well with Fivetran.

## **Kevin Hodgkins**

It is. I agree with that and that's really through the different functions it's data moving in all of the directions. So for us, our sales engineers are also part of our customer success group.

And we have a group called technical success managers in addition to our customer success managers. Both sales engineers and TSMs they also have a support role in a way.

The focus is different but they're there to serve customers from a technical perspective, help customers get around problems. For us customer and technical support is focused more on actual product issues.

And our sales engineers and technical support engineers are more focused on helping the customer get something put in place. I also say sometimes our technical support is about resolutions and our technical success and sales engineers are about solutions.

So they're both about solutions but one's just a little more. So one of the first things we did with data when I got here was we created a health score. Of course lots of folks do that, it's important.

And we're a data driven organization, that's our role. We help other organizations become data driven as well. And taking that health score and we also created a separate thing called a strategic score, feeding that into our support team helps them understand the state of the customer.

And this was before Krishna, before we found you guys but that was a good indicator for us that a customer needed kind of special handling.

We'd love to give everyone special handling. We want to create these we say high resolution experiences at scale but the reality is you do need to differentiate.

And there are customers that you really have to go an extra mile for based on where they are within their journey. So again, just to wrap up on that, that data goes every direction between all of our roles and building that richer data set enables better coordination and better ability to converge those functions.

## **John Ragsdale**

So Krishna I really like something you said about the information that support is learning from customers is relevant across the organization. It's relevant to the product, probably even the sales process, the implementation team, et cetera.

I think historically support always hasn't had a lot of clout or visibility in the organization. I know you started your career in support as did I. So I'm thinking maybe being able to analyze these conversations and create some data from that is finally going to give support some of this visibility and respect that they should have had for a long time.

Are you seeing that happening?

## **Krishna Raj Raja**

Oh absolutely. Yeah definitely this company was founded from my personal experience doing support. What I noticed that customer conversations often goes beyond break fix issues.

Yes you start with a technical issue and you try to resolve a technical issue. And often you become the trusted advisor to the customer. And in my experience, customers would ask me when I was a support engineer would ask me, hey, what is the best solution for this?

What is your recommendation for this? And you become a trusted advisor. And often you help them to adopt a product even more. But generally seeing product adoption is in the realm of customer success.

In my personal experience I've seen support doing that. So if you're not just focused on solving this issue, closing the ticket, moving onto the next ticket, if that's not the way support is run, you're really thinking about what is a customer trying to do with your product and how can you help them use your product and better utilize it.

And customer support role can go beyond traditional break fix. So that's what I've seen at a personal experience. I'm glad to see the industry is moving in that direction.

We are seeing more and more customers now realizing that support plays a very critical role not just providing technical resolution but also in making sure a customer adopts a product and remove any bottlenecks that they may have during the adoption cycle.

Now this is extremely crucial in the current environment where more and more companies are going down this product led growth model. The newer companies that are coming onboard, you take the Zooms of the world, you take the Snowflakes of the world.

You take all this new upcoming companies. Their product growth strategy is based on product led growth which means you put the product and use your product to grow your customer base.

When those customers get access to their product first and if they run into a technical issue and the technical issue is not resolved in a timely fashion or they don't get the great customer experience during that first contact point with support, your adoption is stunted at that point.

In fact, you might even have a churn and you may not even realize you're at a churn. You may think it's a smaller account that churned, but eventually that account could have been a million dollar account. Classic example in the infrastructure world is you look at AWS, you look at Google cloud, most developers start with one instance where they probably pay $ 50 a month for that instance.

But if you resolve a technical issue and you give them great experience, that one instance becomes thousands of instance. And the $ 50 contract per month turns into $ 50,000 contract per month.

So support now plays a very important role in the revenue stream. And I'm glad to see that being recognized in the companies that we are talking to.

## **Kevin Hodgkins**

Yeah. Krishna you hit one thing I want to respond to there. And it's one of the kind of core principles of our customer success group overall.

And that is we say we want everyone on our teams to live outside of the transaction. Fivetran is a product led growth methodology company.

And even at the very beginning you live outside of the transaction, serve the customer. Don't worry about just closing the deal. Don't worry about just closing the ticket.

Don't worry about just answering the customer's question. Think about how this all fits into a customer journey because if you do the right things, your customers will grow with you and that's so very important.

So live outside of the transaction everybody. Figure out how to create these good shared experiences with customers.

## **Krishna Raj Raja**

Yeah. The other angle also with that is that I also in my support experience, this is 15 years old now but even during those times some of the technical support questions will kind of form the realm of professional services.

Customers sometimes will say, hey, I'm trying to do this. I don't know if your product can do it. And maybe you can write a small script for the customer and that'll get their job resolved.

So as a support engineer you can take two approaches. You can say, hey we don't do this. You should talk to our professional services. Or you can help the customer and help them move forward.

And we were encouraged to do the latter. Like help the customer and move the customer forward. That again is an example of where adoption, you're not hindering the adoption.

We're not adding additional friction points by redacting customers to a different department in a different process. So this is also being recognized by a lot of the customers that we are working with.

Some of them are even bringing professional services under the support umbrella which I thought was very interesting. I know every organization is different so I'm not saying this can be applied to every organizations across the board.

But this trend of solving customer problems and why the customer is facing the problem, what can be done on the product side, what can be done on the services side, what can be done on the customer success side.

Taking that approach and unifying it makes a huge difference. And this is what led us to start this company SupportLogic because our focus is it's not just about resolving issues faster but also what can you learn from customer interactions?

How can you make your entire organization very customer centric, bring them into the same common shared data point so that everyone understands what needs to be done in their respective organizations.

## **John Ragsdale**

So we're getting a lot of questions from the audience of about how this customer sentiment score is actually created or measured. Could one or both of you add some color into how that is actually created.

## **Krishna Raj Raja**

Happy to share. Kevin, I'm kind of curious, I know you mentioned about you'd like to create a sentiment score before you introduced SupportLogic. Could you tell us that story and then I can tell how we do it in SupportLogic?

## **Kevin Hodgkins**

Sure, so I can hit on that real quick. For us it was really more of say traditional health score. Of course, everyone's health scores are a little bit different but we were focusing on six categories.

And so we talk about the business relationship which includes the length of time someone who's been a customer, how they engage with us, what's the breadth and depth of our connectivity to different contacts within the customer.

Something we call friction which that's really around the support side where we have something called a quality score where you can attempt to judge sentiment and also attempt to judge what the support experience was.

But that's like fully qualitative. And from there because it's a human measuring it and trying to report on it. And then of course we have usage and for us being a consumption based pricing model we are also very focused on that expansion.

And our expansion can be measured constantly. As people's use, there's more data running through Fivetran. So that health score helped and we still use it, it's important.

But it's more of a rear view mirror. Like it's a rear view mirror that we've then used to try to look forward and help us figure out how to help customers and which customers need more attention.

But again, that's exactly why we went out into the market looking for a tool and found you guys. And the questions that are being asked in the panel are some of the same ones that I asked your sales engineer and your sales team.

How is sentiment judged, show me how I can best use this.

## **Krishna Raj Raja**

Yeah thanks Kevin. Let me show how we do it and why we took this approach. So I've shared this slide before. This is the core technology that we built in.

So one of the key thing we do is signal extraction alone is not sufficient for any truly intelligent system. And if you look at human beings we are very context driven.

In fact, intelligence cannot be defined without context. When we wake up every morning we know where we are. We don't need to be reeducated about everything, we have the context, prior context that's what gives us intelligence.

So same principle needs to be applied for customer interaction. When you're interacting with a customer you're not starting from scratch, from ground zero, customers have already interacted with you in the past.

Maybe they had a positive experience, maybe they didn't have a positive experience. Maybe they had an escalation in the past. All the prior customer interaction context is very essential and that needs to be factored into the signals that you're seeing in the current interaction.

So we use a combination of these current signals we're seeing with the current interaction, roll that context and then we also look at historical context of this customer interaction. And we compute our customer sentiment score.

We factor things like sentiments, not just past to a negative sentiment but what are the various elements of sentiment? Is it frustration? Is it confusion? Is it unhappiness with support or unhappiness with your product?

Because these two have two different resolution paths. If you're unhappy with a product support can give a... Have seen scenarios where the customers would say your support is fantastic but I'm so upset with your product or you can get the opposite, your product is great but your support is terrible.

So these have very different implications on what you need to do as an action wise. So we are able to identify that level of granularity when it comes to the signal extraction.

And then we tie that with what is a customer's impact? Is it a production issue? Is this an issue that causes significant downtime for our customers? And then what is the risk the customer is expressing?

Is a customer talking about your competitive product? Is a customer saying that he is going to potentially not use your product anymore. These are all early churn signals. And LP provides an ability to process that.

And you can monitor this in real time which means you can get real time notification. So we send alerts real time. So the alerts can go to their customer success manager, you can go to the support managers.

One of the delightful experience our customers of our customers receive is they express negative sentiment or some sort of a frustration. And then a call comes from the customer success manager just 10 minutes later.

And that completely transforms the customer experience. And this is why a lot of our customers see a significant jump in NPS score and CSAT score because you are attacking this problem while it's happening not with a survey which is too late.

The customer has already given up when you're sending survey requests. So this is the core value that we provide. On top of that, this is just I want to build out this on our architecture.

We have multiple models that we built and these models have different use case is for different functions within your organizations. So for example we have a model that can predict escalations, customer escalations in advance.

If you're able to predict customer escalation in advance, there are two people that needs to be notified in the company. First, obviously your support team needs to be notified because from a support perspective you want to minimize the customer escalations.

But also you want to notify your account manager or your customer success team. They need to be notified because an escalation is a potential churn risk and they need to be on top of it.

So we allow collaboration between customer success and the support team by our ability to predict escalations. And then we can give account or perspective overview.

You can pull up an account and we can tell you everything that happened with this account from a support perspective and what challenges a customer is facing. So very quickly you can understand, you don't need to read hundreds of support cases to understand what's going on with an account.

Our account insights which we call a customer SX model can provide that. So this is how we are solving the customer health problem and also converging the support and the success team and also the product team.

## **John Ragsdale**

Krishna, thanks for that. You answered a lot, lot of the questions coming in from the audience. Well no project is ever complete. And I had asked both of you to talk about what's on the roadmap for your organizations.

Kevin, could you go first? What's next for Fivetran?

## **Kevin Hodgkins**

Yeah I'll hit that really quick. So what's next for our company overall is we really are in kind of a big scale up. We say we changed from a startup to a scale up at some point and that's where we're at.

So we're looking at doubling our revenue and customer accounts. Again we just released like we went over 2000 customers and so that's a lot.

We moved from just under 1000 last year at this time to over 2000, lot of good growth. To be able to do that, our customers are of very different sizes.

We have customers from $ 10, 000 per year up to very, very large amounts. And we need to be able to provide self service to our customers.

They need to be able to get answers quickly themselves. Many customer of software want to be able to self serve, that's what they want to do first.

They want quick answers and they don't want to have to deal with all of the back and forth. So that's a really important part of our growth journey. And then last we have to continuously evolve our customer insights program.

SupportLogic is part of that, we have to continue as I was talking about earlier, share information across the different roles to ensure that we are most productively working for our customers.

We need to be more proactive in identifying issues not just with the product or software but also issues that may be relational.

We need to be able to take that data out of our conversations and communications with customers to be better and make sure that everyone within our org has access to that.

And I'll say real quick, didn't touch on this earlier, it's not just customer success. We also have marketing that helps us focus on the customer journey. And if they don't have the context of what's going on with the customer then they can be sending the wrong messages at the wrong time and can actually have some negative impacts.

So we really want to guide that customer journey and the customer insights are critical to that.

## **John Ragsdale**

Well thank you for sharing that. Krishna, what's on the roadmap for SupportLogic?

## **Krishna Raj Raja**

Yeah one of the fundamental things we are doing is the insights and intelligence our platform produces. In the past we have been only serving this to support managers, customer success managers, product managers and engineering managers.

Now we are taking those insights and directly delivering that to support engineers themselves. So we are becoming basically an angel on the shoulders of support engineers gently nudging them and guiding them what they need to do with every interaction that they're having with the customers.

Again, this goes back to the fact of doing things in real time has a significant impact. If an AI is coaching you and giving you guidance on, hey this customer has expressed frustration in the past, you want to be careful here.

This case is likely to get escalated for such and such reasons you may want to focus on certain aspects of this case when you're interacting with this customer. That kind of a coaching especially now the AI is not only looking at this particular case but also looked at the previous cases this customers open.

That context can greatly change the way the support engineers interact with customers. We believe this is going to fundamentally change every metric that your organization is measuring whether it's MPS or CSAT score or churn net retention rate because it all starts with this fundamental interaction point that supporting engineers have with your customers.

## **John Ragsdale**

I love that. I mean companies spend so much on quality monitoring programs and that usually means pulling an agent in and saying, two weeks ago you had this phone call and you could have handled it wells. And it's not really helping two weeks after the fact.

So I love the idea of the proactive coaching. Well we've got a couple of minutes left I know there's a lot of questions from the audience. Vanessa, do you want to ask a couple of the audience questions?

## **Vanessa**

Sure. Since we have quite a few, I'm going to jump right in. The first question being, what are some thoughts around best practices, division of labor between customer success, highly complex technical support and fee- based professional services?

And how do various technologies like SupportLogic and gain by support to those best practices?

## **Kevin Hodgkins**

Hey John I'd love to answer part of this question which is around some of the best practices of the division of labor between these teams. So the way I think about it is that the customer success team they're really responsible for that future state of the customer.

They're really responsible for helping ensure that customers can use and gain value from use of the software. How does that turn into some business goals?

That turns into things generally around retention and revenue growth. Our support team as I said earlier, they're focused more on the resolution of problems but they also address solutions.

If we think about that in concert with customer success and also with fee based professional services, our fee professional services are generally, they're scoped, there are deliverables that are part of that services contract.

So when we're engaged with PS, PS ends up doing a lot of support, a lot of frontline support.

But they also end up taking care of some issues that really have nothing to do with the scope of deliverables that they have. And our technical support team should be able to provide both resolutions and solutions to more point in time issues.

So I think that real way of focusing is that customer success is more forward looking, service is deliverable focused. And then our technical support does more to take care of the current state of the customer.

And that goes beyond just the technical resolution. Even with a highly proficient technical team, you have opportunities to build with tools like SupportLogic, that ability to better serve, to think about the future state.

To think about the projects that are being worked on and the deliverables but to really focus on that good current state because otherwise the deliverables are harder to get out and the future state of that customer along their journey is not going to be as good without a solid current foundation.

## **Vanessa**

I now would like to take this time to think our presenters, John, Kevin and Krishna for delivering an outstanding session. And thank you to everyone for taking the time out of your busy schedules to join us for today's webinar, A Real World Case Study: Unifying Support and Service Experience With Customer Data brought to you by Technology and Services Industry Association and sponsored by SupportLogic.

We look forward to seeing you at our next TSIA webinar. Take care everyone.