21.11 NA WEBR 11.16 Reduce Case Backlog - Recording

## **Martin Schneider**

Morning, good afternoon, good evening, wherever you may be in the world. Thanks again for joining this SupportLogic webinar, Get in Front of Case Backlog with Less Effort.

Of course we'll be talking about working on your case backlog. I've got some great speakers with me. I'm going to go actually in the opposite order, because then we're going to kick off the conversation pretty quickly but with me from SupportLogic is Jono Williamson.

He's our lead solution consultant. He has been a solution consultant, solutions architect, really building out great CX strategies with customers at companies like SAP and SugarCRM, so Jono, as always, thanks for being with us today.

Also with us today is Francoise Tourniaire, who is always known in this industry as FT, which I love.

Francoise founded FT Works which is a consultancy firm that helps technology companies create and improve their customer experience and support operations. Her expertise includes designing customer journey maps, process, streamlining, support website design, customer skills training, and creating effective metrics and dashboards.

She's the author of The Art of Support: A Guide to Running Customer Success and Support Organizations, now in its second edition, and three other books about support that you should all go and check out, so FT, as always, thanks for joining us today.

It's great to have you here.

## **Francoise Tourniaire**

My pleasure.

## **Martin Schneider**

Okay, great. Now before we begin, before we really dive into talking about backlog, we do have a poll really just to set the stage and see where the attendees here are at in terms of managing their backlog.

So really quickly, let's take maybe 30 seconds for this, it should be a pretty easy one. How do you manage case backlog today? In the CRM or ticketing system, in spreadsheets, or manually through meetings and conversations.

I'll give you guys a couple seconds but as it comes out, it looks like there is at least a majority here that is using some form of technology to manage that which I think is a good sign, it's a good beginning.

Great, well we are... I'm going to share the results quickly on this because I'll talk through that. Given your responses, a wide majority of you, 85%, are managing your backlog in the CRM ticketing system, that is awesome.

Great. All right. Now let's exit out of that poll and let's get started really because FT, it looks like we've got a pretty educated crew here, but let's talk.

What is backlog? If you can just kind of run us through what you see, because I think yours is a little more inclusive than what some people might be thinking with a more narrow view to what their backlog means.

## **Francoise Tourniaire**

Thanks Martin. So let's talk about backlog. Let's define some things. Item number one, case backlog is everything. I usually get a whole lot of pushback on that from customers who say, " Well, we don't count cases where we're waiting for the customer and we don't count cases where we're waiting for engineering and we don't count this and we don't count that." So really we only have that many cases in the backlog.

So that's totally the wrong approach. Backlog is everything. If a case is one second old, it just was created, it is in the backlog. It's not bad backlog, it is in the backlog.

If a case is a day old or a week old and we're working on it in support, it's in the backlog. If a case is waiting for a customer to do something, it is in the backlog.

It's still our responsibility to push it forward until resolution. If we're waiting for a bug fix, it is in the backlog. If we're waiting for a feature request, it is in the backlog.

So everything is in the backlog. It makes things very simple. You can compare year to year, et cetera. So everything is in the backlog and it's not necessarily just old cases, although of course the problematic ones are old cases.

So if we go to the next slide, let's think about why we want to manage backlog. Three reasons. Reason number one and probably the one that popped up in everybody's mind is customer sat.

So we are all customers of somebody, and we don't like it when cases age. I don't like it if it takes a week to resolve an issue.

We know that cases that are aging are more likely to escalate. That's just a universal truth. So for customer satisfaction reasons, we need to manage the backlog.

But there's other reasons. So the reason that I think is actually most important to people in your team is because it makes them slow. It makes them into little sloths. Martin mentioned that I do customer skills training with support engineers, and when I do that, I always ask them, " What's the right size for your backlog?" So we're talking personal backlog here, and there's a wide range of answers.

Some people have a very high tolerance for large backlogs, but most people, say, " if it goes beyond 15, 20, 25, then I can't do it anymore." Now these are people who have big screens, so that's not the problem that they cannot see the entire list.

But it just... It defeats them to have a list that long. It makes it really hard to jump from one to the other because I can't... I don't know about you, but I cannot keep 15 or 25 things in my head.

I can keep five or ten maybe, but not that many. So it is a big drag on productivity to have a big backlog. And then the third reason is one you may not have thought about, which is that the backlog is a good signal to you.

That something may be very wrong. So if Tom over there has a big backlog, it could be that Tom is not equipped to do his job. It could be that Tom is lacking some technical skills, that Tom doesn't know how to say no to customers, that Tom doesn't know how to pursue engineering issues.

So that's a personal, individual, performance issue. But, and that's much worse, it could be a systemic issue. So it could be that as a whole, we are not well- trained in this particular area of the product, so all of these cases just sitting there.

It could be that as a whole, we are not very good at saying no to customers or getting customers to approve our solutions. We need to train. It could be that as a whole, we have a bad setup with engineering where most of our backlog is actually engineering bugs.

And what can we do about that. So I would say it's really interesting to do backlog management for that reason, to see what is in our way in general.

All right, so enough talking about what and why. Let's just do it. So if I can have the next slide, let's look at this ecosystem. So you might have joined this webinar...

Well, you might have joined hoping for Jono's demo, so it's coming next. That's a good thing. But you might have joined looking for five tips to do your backlog. That's not what I'm going to talk about.

What I'm going to talk about is how to do it right. So how to do it right is to really think of backlog management as being part of a much larger ecosystem which is described on this slide.

So we're going to start at the bottom. We're going to start in the big green box at the bottom, and we are going to build up to the purple stuff which really is backlog management. But as we will see, if we don't have a good infrastructure, then it's never going to happen properly.

So what is in that green box? In that green box is really people management if you think about it. So if you want to be doing well with backlog management, you need to start with people who are capable, so capable technically, capable in customer skills, and also want to be there and want to stay there.

So hiring, training, I could add retention to that. You really need to pay attention to that. A lot of times, we have backlog issues because our folks just cannot solve the cases that they have or our folks disappear the minute that they get able to actually do that.

So you need to start with that people management slice. One slice above is knowledge management. So knowledge management is there because if you're reinventing the wheel every time you solve the case, your efficiency is going to be very bad and therefore you're going to have a lot of cases there.

So knowledge management needs to be there. If you're not doing the knowledge management now, please start and don't worry so much about case backlog in my mind until you have something prudently laid out for knowledge management.

The next layer doesn't have a box, but it's all in kind of grayish stuff, and it's all about case management. So this is what you're doing process- wise to resolve cases.

I have four areas here, one is case assignment, one is case clinics, swarming, and then internal SLOs. So let's look at them quickly one by one.

Case assignment. Case assignment just means let's put the right cases in the right people's queues, and if you think about it, if I give myself a case that I know how to deal with, then chances are it won't stay in the backlog, I'll just do it, because I'm capable of taking it to the end.

So case assignment depends on at least three things. One is the technical skills that I have, two the customer type, in other words, if it's a premium customer it needs to go somewhere else, but is it a customer that needs special care, et cetera.

And then the third would be time of day. If it is right now 10 something in California, it's a good time for me to work on it. If I'm sitting in India, it's not a good time for me to work on it.

So that's the third thing is time of day. So case assignments, props to you if you're doing this automatically without having a person, a dedicated queue manager doing it, but the idea is let's do it quickly, let's do it accurately, and things will work better.

So you've assigned the case to the right person but sometimes they need help. So they may need to take advantage of a case clinic. Some people call them scrums, some people call them reviews.

I have a lot of review boxes in here, so I decided to stick with clinic. But the idea is it's a forum where I can go with my case that is problematic and say, " Hi guys.

Anybody has an idea for me?" And I can get a quick tip as to look at this knowledge base document, ask this question of the customer, " Oh I remember seeing this. Did you try X?" So the case clinic is a once you're in type of mechanism to get help and it's wonderful because obviously it's not just me learning, it's everybody else learning about my case.

Now sometimes, the case clinic is not enough. Sometimes, I really need to say, " Hey Martin, I need a deep dive. Can you come with me," and we need to work on this together. This is not a case clinic thing, this is we need to really do maybe a repro together or an advanced troubleshooting session.

So that would be swarming or collaboration, and to do that, you really want to look for a very frictionless way of doing it, which means it should be super easy for me to ask for help.

There should be no shame. The shame factor is very high there. No shame in asking, and then if Martin is going to help me, it should be easy for him to figure out I need help. No friction on his side, and there should be some kind of a reward for him to help me.

Because if you say, " Well Martin, the way we're going to measure your performance is you need CSAT of x and you need to close three cases a day," then Martin helping me is going to be out of the goodness of his heart.

He's doing it in addition to his regular work. Whereas if you say, " Well Martin, you need to resolve x cases and you also need to help whatever many people," then it's going to work a little better.

So that's the collaboration piece. And then I broke out internal SLOs, which if you think about it, is really a collaboration piece, but it's collaborating with people who are outside support.

So do I have a way to collaborate with engineering? Do I have a way to collaborate with ops? Do I have a way to collaborate with licensing, whatever groups you need.

And often, that is a big weakness as we know in support organizations. Notice that we haven't talked about the purple stuff yet, which is the backlog management.

But we are. Okay, so let's talk about the purple stuff. The first layer that's sitting on top of case management is this idea of queue reviews. So queue reviews is a very simple thing, but often neglected.

And queue reviews just say, " I am a support engineer. I have a queue. Maybe once a week, I'll sit down with my manager and we'll just go through each case in the queue quickly and say, " FT, how are you doing with us?

Do you need help? Are you stuck? Do you need help? Have you been too shy to ask Martin for help? Have you not banged on engineering's door enough?"" Et cetera.

Now if you have somebody who is experienced, who is good at managing their queue, you may not need to do this every week. But with a newbie, somebody who is not so good, really, really important to have these queue reviews.

They sound silly, but they really make a really big difference. All right. Let's go to the left. On the left is something called resolution targets.

So this is pretty important from a psychological perspective, and the idea is how do we designate a case as being old?

Let's say in a reasonably complex environment, we say a week is old or maybe two weeks is old, something like that.

Then we are all cognizant of the fact that this case is now in advanced stage, we need to do something about it. Now it doesn't mean we should slam it shut, not at all.

But it just means there's something going on here. This case is hard. This case needs help. This case needs attention, and we'll see what kind of attention we get.

So I would absolutely designate that as a target. It doesn't really matter what you pick for that, and again, there's no shame in having an old case.

But there is shame in having an old case that's not progressing. So resolution targets. I've talked about shame too much, sorry. I tend to be pretty emotional about things.

All right, go to the right hand side and let's be completely unemotional here, backlog analysis. So backlog analysis is just like queue reviews is just kind of supersized, it's at the level of the organization.

So I'm not looking at what's FT doing with her queue, very important, but that's a queue review thing. What I'm doing is what are we doing with our backlog, and this is where you will find trends.

So you will see, " All the cases about Product XYZ. Why is that? Are we not trained enough?

We have a lot of cases there that we should not even be working with. They are outside our scope." Clearly, the team as a whole doesn't know how to say no to customers for example, we need to go train them on that.

Or, " 20% of our backlog is engineering backlog. Why is that? We should have a better mechanism to work with engineering issues." So backlog analysis to me is super important because it allows you to fix systemic issues.

Okay, one more box to go and then you get to Jono. The last box is about executive case reviews. So the idea here is we want on a regular basis, we want to go to the executive team, to the management team, of the support organization, and we want to look at the aging cases and we want to make sure that there is a plan for these aging cases.

Again, no shame, but the idea is we need to have a plan. We can't just have these things sitting there, and by having the management team as a whole look at it, that's a lot of peer pressure to say, " We need to move these things." Now you might be sitting there saying, " Oh FT, we have 2, 385 cases that are more than two weeks old.

We can't possibly review them." I've been there, literally. If you are in that situation where you have a lot of aging cases, then start somewhere. Say, " Okay.

We'll only review the cases that are more than three months old or God forbid six months old." When you have a list that's at a reasonable level, and then you ratchet down over time.

So if you do all of these things, I really believe that you will do much better with your backlog, and with that, Jono will show you how SupportLogic can help you with all of that.

## **Martin Schneider**

That's great FT, and before we do move on, I think one of the interesting things, you call it an ecosystem, and I think one of the great things is this isn't a... This isn't looking at a case and looking at it as a kind of linear chronological workflow of how you would attack it.

This is really kind of all happening and interlocking, right? And you can probably start with some of these if you don't have all of these and start to make headway. I mean this is a...

This is an idealized vision that people can work to which is really great. It's not just... You don't have to boil the ocean immediately. Which is really, really great. Before we move onto Jono, and thank you for that FT, that was awesome stuff.

Before we move on to the demo portion, if you have any questions about what we just went through, or about what you're about to see, just a reminder, put them in the Q& A section, you see the little Q& A button, not the chat, and we'll get to them at the end.

We'll have a little bit of time for Q& A. So with that, Jono, why don't you take it from there. I mean we take backlog really seriously here at SupportLogic, so Jono, why don't you give a little background of how we approach things and obviously show them a little bit of the product.

## **Jono Williamson**

The proverbial I'm stuck on mute thing, right? Getting a little old now with people, it's like, " Okay." So hi everyone and thanks FT, that was fantastic.

I am excited to show you some of the product today and how we can help you reduce backlog using SupportLogic. So I think I'm going to have to share my screen here, Martin, so let me see if I'm just sharing it properly.

## **Martin Schneider**

Looks good to me.

## **Jono Williamson**

Okay, so before I show you the product, I think it's important to show you a little bit about what SupportLogic does and it will put it into context of how we can help you reduce backlog.

So what SupportLogic does is for those of you that don't know and I see some common names on there, people that have seen this before, so apologies if you're seeing it again.

What we do is we analyze all the back and forth messages between support engineers and the customers, and we use natural language processing to extract what we call signals outside of it and we use AI to make predictions and provide scoring.

So let's talk about the signals part of it. On the right hand side here, you can see just some of the signals that we extract. We look for language that might identify that it's a critical issue, that it's urgent, that a customer is confused, et cetera, and we identify that inside of the messages going back and forth and we'll tag that on any particular cases.

So you'll be able to know which cases customers are expressing frustration on or critical issues, et cetera. We also use a customized ontology library. So we have an ontology library that every customer can customize for themselves to look for certain keywords and product signals.

So is it relating to one of our patches? Is it relating to one of our products, et cetera. We also look at outgoing messages, so we can tell you if engineers are showing empathy, are they being polite.

But this is what's relevant to today is what we do is we provide on every case interaction a realtime attention score and a realtime sentiment score. What the attention score does is it tells you whether or not we believe that customer needs more attention, and how we determine that is based on what signals we're seeing, such as are we seeing an urgent signal, are we seeing a critical signal.

And then also, the metadata, such as are we replying back as quickly as the customer is replying to us? The customer might reply immediately but we're taking two hours to reply.

That's going to increase the attention score, and therefore we're going to say, " Hey, we think this customer needs more attention." The sentiment score looks at the language and tells you whether or not the customer's sentiment is changing, going up or down.

So are they expressing negative sentiment, and again, just to emphasize, these happen in realtime, right? So as new messages come in or as time goes by, these numbers change, and I'm going to show you how you can use these numbers to prioritize backlog a little bit later, and just a little bit of an advertisement as well, not relevant to today, but we also do things like we predict whether or not cases are likely to escalate, we predict whether or not customers are likely to churn, and we can also recommend the right engineer to handle a particular case or ticket and I'll show you a little bit of that today because that too can be relevant as Francoise mentioned earlier about reducing backlog, getting the right person to handle a particular interaction.

So let me show you the application here really quickly. Let me go over here. Going to have to switch screens really quickly.

Here we go. So here we're looking at a backlog screen here that I prepopulated but I'm going to show you how you can populate a backlog screen for yourself. So I'm going to go to another demo instance here where it's a blank backlog screen.

So what we allow you to do is create a backlog screen and create different lists of outstanding cases and prioritize them the way you need to prioritize them in your organization.

So let me give you an example of something fairly simple here and then I'm going to show you some more advanced side of things. So the first thing I'm going to do is I'm going to prioritize cases by conversation count.

So you can see, you can title the list here, you can also filter the list and I'm not going to filter anything just for the sake of speed but you could say, " Hey, I want high conversation counts for my premium customers," or something like that.

And then you can see all the different things you can rank cases by here, so I'm just going to choose conversation count. I'll show you some of the more advanced ones a little bit later, I'm going to show you the basics to start with.

So now what we're looking at here is my backlog based on conversation count here. So I can also add more lists, so I can add another list here and maybe I want to look at a case based on last outbound message on my list of cases.

So again, now I'm going to look at cases where my last message was sent to a customer, and now I've got another and a lot of them where I've never actually sent a message to a customer.

So you've got this list here, and now how do you interact with that list? So let's take a look at this list here, this first case here with the Atlanta Falcons. If you take a look at that case, you can open it up inside of SupportLogic, and now you can review that entire case back and forth and what you're able to do now is interact with that case directly from SupportLogic and any changes you make will go back into your existing system in realtime.

But I might look at this case, I can see currently one of my engineers, Jordan is working on this particular case. Maybe I want to see how Jordan is doing in general, so if I actually look at Jordan, I can see Jordan's actually got a pretty high bandwidth here, and working on a lot of escalated cases.

SupportLogic will actually also tell you who we think is the right person to handle this particular case, so going back to one of the pillars that FT was talking about there, getting the case in the right hands of someone.

So maybe if I assign this to Jalil, I had to pick a name I'm having trouble pronouncing, Jalil might be able to handle this case a lot better, and I can also see, " Okay look.

Actually Jalil has no backlog right now, so a great person to handle this, great time overlap." And so I could easily reassign this to Jalil and let Jordan know that Jalil is now working on this so I could add a case note and let them know.

Now let's say Jalil was fairly new and I knew somebody else who actually could help him.. So I'm going to say, " I'm going to get Martin to help you here." And going back to the swarming that FT was talking about is what you can actually do here is highlight something and I could invite Martin via Slack, Teams or email and say, " Martin, can you help Jalil here?" And then now Martin will get a message inside of Slack or Teams or email with a link to be able to interact with this case and get out in front and swarm around that case, and you can invite other people as well.

Now I've shown you kind of the basics here, but I want to show you something a little bit more advanced here. Let me show you how you can arrange cases by attention score. So remember, I said we give every case an attention score with a realtime attention score.

So now, instead of just looking at basic metadata, now you can look at this enhanced data that SupportLogic is providing you, such as here's the attention score and here's a case here with that has an attention score off the charts, it's at 100, and it's also likely to escalate.

And so now maybe I might want to prioritize this, and you can go even further and you can do it by sentiment score, and I might want to even sort of filter this down to sentiment score by my customers just in North America, right?

And then if I hit create here, oh, I've got to pick sentiment score, and then now I'm looking at sentiment score. So not only can you arrange by data that you already probably have in your CRM such as conversation count and last outbound message, but this enhanced data we're providing you, allowing you to get out in front.

Let me show you one other thing here which is really cool. I'm going to show you can add filters on the fly here, so you could add filters by looking at priority and product, et cetera, but I'm going to add keywords.

Remember I said we have an ontology library and we extract keywords. So now when I look at this and I'm going to say, " Okay, I only want to look at my high priority cases, but what are the key words I'm seeing across these cases?" And you can see the key words that we're extracting here and 117 of them include the word security.

So now you could narrow that down to look at just cases related to that security or a particular patch or anything, any data that we're seeing inside of your data and now you can narrow that down to see if you can look for any commonalities around that backlog and see if you can clear that quickly.

So again, showing you a few different things available here in SupportLogic and there's a lot to show, I did it really, really quickly and as Martin will mention, we're more than happy to go into some more detail on one to one demos if you'd like to see some more detail, but that's it from me today.

Thank you. Back to you, Martin. You're doing my mute thing, talking on mute.

You're trying to copy me.

## **Martin Schneider**

Okay, because I thought I hit mute before I changed the screen, but we're all good. That was awesome. So we learned a lot about taking a really fine- tuned and ecosystem approach to managing the backlog around kind of people and process and then we also talked about some of the technology that can help you out.

We have a few questions that came through and as always like I said, there's a little Q& A button there if you have any questions, and if you would like to maybe juts learn a little bit more, you can send over your email in the Q&A and we'll make sure to reach out to you as well if you haven't had a demo yet of what we've done.

All right, so the first couple questions that we have I think come from the earlier portion, so I'll let FT handle those. FT, do you recommend assigning all cases at creation, or using some degree of unassigned backlog?

## **Francoise Tourniaire**

Okay. That's a great question and I probably shouldn't have said anything about cases that are one second old. So there are indeed at least two ways to assign cases.

One is to do it immediately, and the second is to wait a little bit, maybe let people grab their own cases, et cetera. So there are pros and cons to both.

I don't think it's particularly a best practice to assign at creation because a lot of things can happen between creation and the time somebody can actually do something about the case.

In other words, I am always worried about that gap, where you have things that are assigned, but really nothing has been done on them. What good have you done? Nothing.

You have just cluttered somebody's backlog, and the customer sees zero results. Think about that. That's not a very good combo. For me, I am a fan of pulling as opposed to pushing.

I understand that's a philosophical choice, but I think there's a lot of benefits from people choosing when they are ready to work. Now you can obviously have metrics to make sure that people are ready to work often, but the pulling is better.

So to me, I would love to have a setup where when I'm ready to work on new things, the product will show me immediately the case that I'm best suited to work on.

So there's nothing wrong with having unassigned backlog as long as obviously it's within SLA.

## **Martin Schneider**

Great, great. Another one, definitely in your wheelhouse here, I think it has your name on it, Francoise, can you recap the key things you went through that should be part of a backlog analysis?

I caught aging backlog review at the end, but were there other things that you went through before that that I might have missed?

## **Francoise Tourniaire**

So aging backlog review was one, there were four things. So one was queue review. So the idea of a queue review is what is in this one person's queue that needs to be pushed forward.

Second idea was this idea of backlog targets, in other words, declare a degree of oldness, a degree of aging of the cases, and the other one was backlog analysis, so backlog analysis is what is in my backlog, and then the last one, I think the one that Michelle remembered, was the executive aging review.

So those are the four components. By the way Martin, I'm assuming that people can watch this afterwards-

## **Martin Schneider**

Absolutely.

## **Francoise Tourniaire**

And they will see the ecosystem. So look for the purple boxes and the purple boxes is the answer.

## **Martin Schneider**

Great. Perfect. One on the product side, a question is does it... And I'm assuming SupportLogic, support multiple languages other than English?

Jono, you can key in here, but today I believe we're only managing English as part of our NLP and ML, right?

## **Jono Williamson**

That's correct. There are some things we can do in other languages such as I mentioned the customized ontology library, being able to look for key words and things like that. But in order to get the identification of getting a sentiment analysis or signal extraction, that does only happen in English today.

But in the future, some other things might be happening, but just not right now.

## **Martin Schneider**

Gotcha, gotcha. Very good, very good. So another one for you, Francoise, is you kind of talked about...

Everything could be backlogged, but what's the ideal size for backlog in the sense of... What a mid- sized company with... Maybe who does a few, maybe 100, 000 cases a year.

I mean what should people expect to have in their backlog in terms of managing it?

## **Francoise Tourniaire**

So I'm a consultant so the answer to everything is it depends of course. So I'll try to give some rules of thumb for people. First of all, an absolute number for backlog means absolutely nothing.

If I get two cases a day and I have 20 cases in backlog, that's a lot. Now if I get 100,000 cases a day and I have 10 cases in the backlog, I'm cheating. So there's something in the middle there. So the way I always recommend that people measure their backlog isn't by time. I know it sounds a little funny. What I mean by that is you get 100 cases a day, you have 100 cases in backlog, you have one day's worth of backlog.

You get 100 cases a week, you have 100 cases in backlog, you have one week of backlog.

So that's the measurement, the metric I would like to inspire everybody to use. If you do that, it's a metric you could use over time as you grow, as you release a new product, et cetera.

So always measure in terms of incoming volume. With that, I would say if you are in a complex environment, and you're doing great, you will have two weeks of backlog.

I know that sounds like not very much. If you feel bad right now, just relax, take a deep breath. You just need to work through it. If you are in a low complexity environment, I would say having a day's worth of backlog would be a lot.

So it really depends on the complexity of your cases. But I would say for most people probably on the phone right now, two weeks would be a very good goal.

## **Martin Schneider**

Gotcha. Is there a ratio of matter mean time to resolution to backlog that people can...

## **Francoise Tourniaire**

Exactly. That's exactly what it's like. So if you have a normal time to resolution, which is a week or two, then two weeks in backlog is the right thing. If your resolution is less than 24 hours, then you should have a day.

So there's a good connection between those two.

## **Martin Schneider**

Gotcha, makes sense. Now Jono, you did point a bit on the Slack and the collaboration, so one of the questions is how do you support internal collaborations, how do the collaborators prioritize the work and how can they help improving backlog?

## **Jono Williamson**

Yeah, so I'm going to... FT can probably jump in and talk about the side of things, the strategy of bringing in external collaborators and I can talk about how the software works.

The application is designed to connect to your Slack, Teams or your email and allow you to invite other people to get involved in a case or a ticket.

And the idea behind that is sometimes people outside of your support organization can help you and we're seeing a lot of people starting to use this smart swarming technique that FT was talking about, getting a lot of people working around a case, and they're doing that inside a collaboration tool such as Slack and Teams.

So we support an integration into that. The other thing we also allow people to do is access the case view that I showed you, even if they're not a user of your existing CRM today, and that's the key, because you've got your engineers working today inside of one tool and you've got people working outside in another tool and how do you bridge that gap and let them see everything that's going on without the engineer having to cut and paste everything that's happened back and forth with the customer.

So we provide a tool that allows you to collaborate like that, using the method of your choice. Because a lot of people use different things. Some people use case notes, some people use Slack, Teams, email, et cetera.

So we support all of the above, and then FT, maybe you could talk about how bringing the external collaborators can help reduce backlog.

## **Francoise Tourniaire**

Okay. So obviously a lot of cases are going to be in the backlog because they're stuck. If a case is stuck, then bringing somebody else, either because the original owner is too busy, hopefully not, but could be, or because the original owner doesn't know what to do with this that's going to help.

I just want to put a little plug to you need to be able to reward people who help, and often that's missing. I said that very quickly when I was doing my part of the presentation.

If the only way that you measure people is customer sat and the cases they close, then they will be less likely to collaborate. I mean some people, people in support are very nice people and they will help.

But many of them are going to say, " what? It doesn't really serve me. I could help, but I could also work on my own cases and I'm going to go do that." So be sure that you have a system of rewards that works, that literally rewards collaboration.

## **Martin Schneider**

Great. Another question here is should we be including cases that are awaiting input from outside support in our backlog?

Aren't we setting ourselves up for failure if we include those?

## **Francoise Tourniaire**

Can I be rude?

## **Martin Schneider**

Yeah.

## **Francoise Tourniaire**

Let's think of customers, okay? Let's think of the customer. Does the customer care that the case is stuck in engineering or stuck in support? No. So it's your case, that's your job.

Your job is to push the machine forward, and the machine includes other parts that you don't control directly. So yes, you need to include all of that. It is painful. By the way, it's a wonderful tool to say this is the support backlog.

Half of it, it's really engineering backlog. What are we going to do as a company to solve this problem? This is not a we hate engineering and we are adversaries, no.

It's we're in this together, these are our customers. So I think backlog analysis and executive reviews are very, very powerful to highlight where does this backlog come from. But from a customer perspective, they could not care less.

## **Martin Schneider**

No, you're right. And you even had on one of the icons with the ... It could be a broken process or things... So having that means that it should be giving you opportunity as a leading or lagging indicator to start to analyze some of your process for collaboration with engineering and getting that feedback and having them do what they need to do.

At least to get an answer back to the customer, so at least some input there. That's great. I think one final question before we close.

You showed the backlog, but you mentioned some other key features. What are some of the other use cases for SupportLogic? Of course Jono, we're not a one feature solution.

Can you just go over some of the other things that SupportLogic does very well for support organizations other than just what we just showed in the really cool way that we can... As I like to call it, as one of our sales guys pointed out, put a magnetic glove on, to pull the needles out of the haystack of backlog, but what are the other things that we can do with the AI and all that we bring to the table?

## **Jono Williamson**

Yeah. I kind of glossed over the case assignment side of things a little bit for the sake of time, but if you remember I went in and I showed you, " Okay, Jordan was really busy.

Who do we think should handle a particular case?" So SupportLogic offers a case... What we call case assignment or case routing using artificial intelligence and there's some things that go into that such as looking at your historical cases, finding commonality, finding the right skills and assigning that to people.

And I'd be happy to go into more detail at another time, but that's one of the use cases. Escalation prediction is a big thing that people come to us for. Customers such as Nutanix have been able to reduce their escalations down by 40% using SupportLogic because we use AI to identify those customer escalations, allowing you to get out in front of them before they become a big deal.

Also that signal extraction that I showed you identifying whether or not customers are frustrated et cetera, we have an early warning system. So that early warning system, it might not be in the category of escalation prediction, but it's definitely this customer is frustrated, and that really allows support managers to become more proactive and be able to identify those cases where you're seeing negative trends or negative signals that you want to get out in front of.

We see people using our tool for engineer coaching or agent coaching, being able to look at what they've worked on, what is their backlog, helping them solve their backlog but also looking at their cases and seeing where there may have been negative signals and helping out there, and then just being able to get alerts on all of this.

So all of this stuff that we have in SupportLogic you can get alerts on and say, " Okay, tell me if a premium customer expresses frustration, send me a Slack teams alert or an email alert." So there's a lot of different use cases inside of SupportLogic as well as a full analytics suite as well.

## **Martin Schneider**

Very, very cool. Great. So FT, I'll leave you with the final word. I mean in the sense of what's your advice to people who might have a humongous backlog or they're just trying to get a handle on things?

I mean what's your one parting wisdom that you can leave with the attendees?

## **Francoise Tourniaire**

Okay, so first of all, don't despair. Secondly, create a process. We gave plenty of examples. Create a process and work the process. I once inherited a team where you remember as I said a good backlog is two weeks' worth.

We had about two months, we had cases with birthdays. We celebrated the birthdays as a joke, right? So it was pretty bad, and within six months, we got to a two week level.

So it's possible. There were days when I doubted, but it's possible, just start with what you have and just ratchet down slowly. You will get there.

Trust the process. Just do it every week and good luck.

## **Martin Schneider**

Great. Well, I think we got to everyone's questions. Great questions. Thanks for attending. Thank you FT, thank you Jono.

Like I said, you can always email me if you'd like to see more or maybe even schedule a demo to see some of the other feature sets at martin@ supportlogic. io. Again, thank you all for attending.

We'll be sending the archive of this out to you all shortly. Thanks a lot.

## **Jono Williamson**

Thanks everyone.