Overcoming the Challenges of Tiered Support with Intelligent Case Swarming

## **Vanessa Lucero**

Hello, everyone. Welcome to today's webinar, Overcoming Challenges to Single- Tier Support with Intelligent Case Swarming, brought to you by Technology and Services Industry Association, and sponsored by SupportLogic.

My name's Vanessa Lucero, and I'll be a moderator for today. Before we get started, I'd like to go over a few housekeeping items. Today's webinar will be recorded. A link to the recording of today's presentation will be sent to you within 24 hours via email.

Audio will be delivered via streaming. All attendees will be in a listen- only mode. And your webinar controls, including volume, are found in the toolbar at the bottom of the webinar player.

We encourage your comments and questions. If you think of a question for the presenters at any point, please submit through the ask- a- question box on the top- left corner of the webinar player, and we will open it up for a verbal Q& A portion at the end of today's session.

Lastly, feel free to enlarge the slides to full screen at any time by selecting one of the full screen button options, which are located on the top- right corner of the slide player.

I would now like to introduce our presenters today. John Ragsdale, distinguished researcher and vice president of technology ecosystems for TSIA.

Martin Schneider, chief evangelist and head of solutions marketing for SupportLogic. And Patrick Martin, vice president of technical support for Coveo.

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 one of the hottest trends, hottest topics in technical support today, whether you call it single- tier support, collaborative support, or swarming, everybody's on their way to doing that, trying to sell it, up their organization or down to their employees and looking at the technology infrastructure required to do it correctly.

I think most of you probably joined us for the previous webinar we did recently on this topic, Improving the Support Experience with Intelligent Case Swarming.

We've got a link to that, the on- demand version in the resource list. So, if you haven't had an opportunity to watch that yet, I would definitely encourage you to do that.

Some quick numbers from me. I know you've probably seen this before, but we are still seeing that the adoption of swarming is still among the pacesetter of companies were up to 32%, slightly up from a couple of months ago.

So, we are seeing this climbing pretty quickly. The reason why companies are so interested in this is it comes along with some pretty impressive financial results as well, not only higher employee satisfaction and lower attrition rates, but we're also seeing higher average post- interaction customer satisfaction scores, and improved customer effort scores.

So, this is really a great step toward improving the customer experience. As that customer experience directly translates to renewals, expand selling and long- term account profitability.

If you are interested in this topic, I wanted to let that we have two real experts within TSIA on collaborative support or swarming, Sara Johnson and Dave Baca are the research directors on our support services research team.

They have created a full workshop around this topic. If you're interested in that, they will schedule this with your entire support organization and go through that.

If you want a little more incremental chunks of content, they also have a series of best practice sessions that they can do, particularly this first one, just educating you on what collaborative swarming is, how to get started, how to structure, et cetera.

But I'm very happy to be joined by two of my favorite co- presenters today, Martin Schneider is the chief evangelist and head of solutions marketing for SupportLogic.

And Patrick Martin is VP of technical support for Coveo. Patrick's been on a lot of webinars with us, spoken at a lot of our conferences, so thrilled to have a real practitioner with us today.

With that, Martin, let me turn it over to you.

## **Martin Schneider**

Excellent. Well, thank you, John. Thank you, everyone, for joining today. Like I said, I'm Martin Schneider with SupportLogic. Patrick's with me from Coveo. He's going to introduce himself in a second.

For those of you don't know us. I just wanted to take a little bit of time for myself and Patrick to introduce our companies, what we do, what we're all about.

One of the great things about Support Logic is it really is that kind of force multiplier for your support operations, both the technology and the people. Really about growing fast is what we're up to.

But the cool things that we do is help you reduce escalations. We reduce your case review time using our AI, ML and NLP, reduce meantime to resolution by almost sometimes 50%.

Coveo is kind of at that rate using our stuff. For some companies, depending on their business models, up to 25% churn reduction, really cool stuff, we have great companies.

In addition to Coveo, Fivetran, Cloudera, Databricks, Rubrik, Snowflake, Aruba, the list goes on. Again, our use cases, it's about that escalation, prediction, and prevention, getting on top of your backlog.

Today, we're going to talk about easy swarming and collaboration and intelligent case assignment. These are things that really make it easy for your agents to do the best job that they can.

It really makes it easy for managers to do quality monitoring, agent coaching, case evaluation. Again, it's really about super charging your support and really lifting it to the next level.

Check us out at supportlogic. com. Always happy to have more discussions if you're interested in how SupportLogic can help your team. Patrick, I'm going to turn over to you to introduce Coveo and talk a bit more about your solutions.

## **Patrick Martin**

Yes. Thanks, Martin. Hi, everybody. Happy to be here. Happy to join John and Martin into this wonderful discussion that I'm very passionate about. I am VP here at Coveo of technical support, been in the industry for over 20 years now.

A little bit about Coveo, for those who don't know us, started off about a little bit more than 15 years ago as an enterprise search engine, which was running on premise.

We gradually moved our offering over to the cloud, started playing around with behavioral analytics and machine learning. And today we offer the full relevance platform to our customers.

We basically work with our customers in these four main areas. So, we're in the commerce business, service business for the most part, but also driving corporate websites and any intranet use cases that you might have.

Basically, our platform leverages data and AI to drive personalizations of the experience at scale.

## **Martin Schneider**

All right. Patrick, welcome. Thank you for joining us. You and I had an interesting conversation after the last webinar we did where you said," Look, I want to show you what we've done around swarming, because I think it's really cool." I saw, I thought it was really cool.

I said," Look, let's do another one. Let's expand the series here and do it." But before we get into all that, tell me a bit about Coveo support organization and the size and scope before we start talking about your single- tier support model.

## **Patrick Martin**

Yeah, sure. When we compare ourselves to the big enterprises, definitely our support team is not that big. But I've seen both smaller organizations and bigger organizations, but we've grown pretty significantly over the last four years since I've joined.

Now, we will be finishing the quarter around 50 different team members across different functions within support. Of course, the majority of these people are the ones helping our customers.

We have around 30- ish product specialists into the organization. We also invested heavily into the enablement side of things, having product experts and program managers.

Our program managers lead our different programs, such as continuous improvement, knowledge management, of course, and internal development. We have technical account managers, which is something that we're just starting to grow with our bigger customers.

Of course, there's a layer of management on top of that. We basically kicked things off out of Quebec City, where we were, everyone was here historically, which is where our headquarters are.

We expanded into the Montreal market and now via an acquisition, we now have people on the other side of the pond there in EMAE. which really simplifies our follow the sun model.

Now that we have another location, before we're pretty much working all of our shifts out of Quebec City and Montreal. Now, we've been able to remove everybody from the night shift and move everything over to EMEA, which is pretty nice and very appreciative from the folks that we're working on the night shift.

Because having done it myself many, many years ago, it's not necessarily easy if you're not built that way. The COVEO support organization, at least for as long as I've known, has been a single level support model.

We never really had any different tiers, but the whole collaboration/ swarming model has basically been a challenge until a few years ago.

Now, a few months ago, it's been running smoothly with the things that we're going to talk about today. But right now, the way we split the team is basically around those line of businesses that we have around service commerce website and workplace.

So, we are structuring the team in terms of verticals so that we can really focus on what the customers are trying to achieve with our platform in these different areas.

Really focusing on the outcome versus just limiting ourselves to the break/ fix mindset that we've been seeing historically, at least.

## **Martin Schneider**

Gotcha. I will say, before you move on, I mean, you say, well, you don't have this huge team, but since you guys implement your own solution so well, you probably don't need as many agents as someone else at the same size, doing so much self- service content relevance to help people before they need an agent.

Right?

## **Patrick Martin**

Yeah, yeah, definitely. I mean, when we look at the community traffic that comes through before they get to the case submission, between 85% and 90% of all of our sessions never make it to the case creation page.

So, definitely, if we'd have to answer all of those questions, we'd probably have a much bigger organization. Definitely.

## **Martin Schneider**

Gotcha. So, let's talk about the swarming transformation. You were always, as far as you've known, single tier, but walk me through the process of actually turning on the intelligence swarming.

## **Patrick Martin**

Yes, definitely. For me, personally, I've been on this swarming journey for many, many years in previous lives, trying to figure it out and to share an anecdote here is, when my son decided to go study in programming a few years ago, I told him," When you get out, I have a very good project for you and it's a swarming platform, because no one out there is doing it." Unfortunately, after a year, he decides to go into social sciences.

That's where everything went down the drain. But really just looking at the Coveo side of things, when I joined, the team was much smaller. We had about 15- ish product specialists and the way that they were collaborating together was in a generic Slack channel.

One of the things that really came to my attention is that there was a lot of distraction, a lot of noise. Every time someone would ask a question, whether it's relevant or not, because we have a good camaraderie in the team and people joke around.

So, you had 15- ish people just always going to the Slack channel every time there was something in there, whether they could help, whether they could not help. It was just taking a lot of everybody's time to go and do that.

One of the first things that we did is we said," Okay, that is a problem. As much as we like the way people would collaborate, interact on slack, it was just really cumbersome to navigate," especially if you're looking at the different shifts, if they would need to...

Like if I'm on the night shift and I ask a question in the Slack channel, it's 2: 00 AM Eastern. I'm not coming back before midnight. Then I have everybody's conversations in the Slack channels to go through whether someone answered my question or not, because let's not kid ourselves, not everybody is disciplined, not everybody replies in threads.

So, it was a pain point for the team. When we talked it over and involved people in the team, we said," Okay, how can we structure this better?

How can we make it easier due to the size of the team, the business need at the time?" What we decided to do is move the collaboration into a collaborative forum that R& D were already using.

What that allowed us to do is widen the scope for collaboration, which means it wasn't just any standard Slack channel that only support agents were in.

But now we had visibility through R& D, and professional services, product management. When there was a question, people started chiming in.

It was very asynchronous, but still it was much more structured. The downside of that piece is that it's the ownership piece, that if there's a thread out there and no one answers is what's your fallback mechanism?

So, we had identified people within the support team that were our SMEs or product experts, and they were the fallback mechanism. So, as product specialists are really focused on the customer side of things, no one was really monitoring these forums.

It really fell down to those same four or five individuals to answer questions all the time or follow up with R&D and things like that.

Not very scalable when we think about long term and team's growth and what we needed to do. As we started reviewing the organization, wanting to move to the different verticals that I mentioned, there was going to be a big transformation in the team.

Before we were structured in a way that we were supporting the products that we had and not the line of businesses. We had very specific skills.

Those of you who know us, we have a very tight integration with Salesforce. We have a very tight integration with Sitecore. Those were the two main teams that we had. Then we had the main platform team that supported everything else.

When we started saying," Okay, we're going to build this service team, we're going to build this commerce team." The service now is not just Salesforce, it's everything that's being used in the service line of business.

So, not everybody had the same skills. Yes, we brought people from the platform team over to the service team. However, we would need a much more scalable way to collaborate.

That's when we said," Okay, we're at the point where we need to review this swarming model and say,'We need to build something.'" We basically looked at our tech stack and we said," Okay, what can we do with what we have?

We use Slack. We use Salesforce. Coveo is a piece that we can leverage as well." That's when we started playing around with that and say," Okay, what can we do?" Early in 2022, we had a limited viable product that worked well.

Then we started building machine learning on top of that and all of that, which really brought us to this full- blown swarming model that we've been on now for the last few months.

We're really seeing the benefits of that, as we'll touch on a little bit later in the webinar. But now, it doesn't just fall back on the same four or five people, because we're identifying who has the skills, we're identifying the SMEs up front, we're basically saying," Okay, these people can help.

Let's bring them in a dedicated Slack channel." So, we're limiting the noise as well, and it's been working out. If we need to invite anybody else, we can just add them and it just makes collaboration much easier, much more targeted and focused.

That has been a real transformation for us in how we collaborate amongst the team.

## **Martin Schneider**

That's awesome. I mean, you mentioned looking at the tech stack, I mean, was there, in addition to Coveo, Slack, and whatever using for case management, for service cloud, any other tools that come into play there?

Is it right now just the triumvirate that really... Because I'm wondering about measurement making, time management, workflow, things like that.

## **Patrick Martin**

Yeah. All good questions. Definitely one of the things that has helped us move to this is SupportLogic. I'm not saying that because you are on the webinar, but definitely leveraging the intelligent case assignment feature allowed us to move to these verticals where we're able to say," Okay, this is a commerce case.

This is the group that it goes to," and it gets assigned to the most qualified expert. We're limiting the need for swarming, but when the need does happen, that's when we leverage the tech stack.

So, all of that together has really had the... Well, not had, but it's been what has enabled us to move forward with this model.

When we look at the swarming solution per se, it's really based on Salesforce, Coveo, and Slack.

## **Martin Schneider**

Gotcha. Now, you talked about reducing the amount that it happens. Is that part of the communication? Because I'm curious, the pushback or how smooth the process was in terms of above and below.

How was it received by powers that be, and the people that have to actually deal with managing these cases that go out to swarm?

## **Patrick Martin**

Yeah, we took a very interesting approach to it, is we actually sat down with the people in the team and we said," Who wants to be a part of this?

Who wants to build it?" We had, at least out of the team of, well, 45- ish, 50, we got 10 people who wanted to put their names in the hat and wanted to help build this.

So, it made the whole change management function much easier, because people saw the value. That really simplified it. On top of that, one of the things that we've been doing for a long time now, and it's not just with the swarming model, but we try to limit our objectives, our individual objectives.

We try to measure people based on team goals. That in itself encourages collaboration. We're not measuring people on the number of cases that they take or the number of cases that they close.

We look at the team's overall efficiency by looking at our median time to resolve as a team, as our overall CSAT as a team, our overall customer effort score as a team.

We look at team metrics and team objectives. Even if you have to put your cases aside to help someone else through a collaboration, everybody wins, because the customer wins in the end.

So, we really took that approach very early on. This is not new for us in swarming, but I think having that mindset and that approach really help, because a lot of the people that I've talked to in the past few months around swarming, where they're struggling is adoption.

Because people are saying," Hey, I have my own case load to work. And if I have to go and help other people, my cases are suffering and I'm being measured on how I handle my cases." I think, for us, that really helped throughout this transition to minimize any pushback that we've had.

So, I think that is definitely something that, well, one of the key factors that helped us through this transformation.

## **Martin Schneider**

Gotcha. That makes a lot of sense. This is, over a few years, one of the things I've always loved about working with Patrick is you measure a lot of things, even the company, and it's always easy to see success and you mentioned those metrics and things like that.

I was sure you had great results already, even though this is something you just put in this year. So, I was actually looking, we talked through this before and I thought," Well, it's great that you're barely a year into it and you've already got some numbers this year." So, you just talked through how this transition has actually helped you guys, before we actually show it in action.

So, if we just want to run through some of these.

## **Patrick Martin**

Yes, yes, definitely. Well, as I mentioned, we measure a lot of our efficiency on our time to resolve and we're looking, of course, like everybody, at first- contact resolution, first- day resolution.

But one of the key metrics for us is the median time to resolve, trying to remove the outliers from that. In preparation for this webinar, I looked at the most recent data in swarming and I really wanted to do a comparative analysis on how things were working on the forum model versus the swarming model.

One of the things that I saw that when we looked at the median time to resolve, when cases did not need any collaboration whatsoever, there was not a huge difference between the time that we used the forum versus now that we're using swarming.

But when you compared the cases that need collaboration between both models, we're seeing close to an 18% improvement on median time to resolve using swarming rather than using the forum, even if R& D professional services...

Oh, sorry, I hit my space bar. Even if the R& D professional services are not involved in our swarms yet, this is something that we're looking for a future phase to see how we get them involved.

So, just swarming within support, we've seen that kind of improvement on our time to resolve. Definitely the customer is benefiting from this.

The entire team is benefiting from this. That has been one of the key highlights to this transformation when we talk about it internally as the impact that we've had on our ability to resolve issues.

The other ones, a little bit like I mentioned earlier, is the fact that we've been able to reduce the noise pollution a lot and really drive accountability and ownership around collaboration and bringing people who can add value.

I mean, even when we have the forums, yes, we had SMEs who were kind of the quarterbacks, but they didn't necessarily know everything. They had to pull other people in. And it just added a lot of overhead around the whole collaboration process, versus now, the machine learning model identifies who the SMEs are based on previous case experience.

They basically say," Okay, you've handled this type of issue in the past. You can help and you can bring those in." Definitely, that's an added benefit. Then when we look at our knowledge management program is, since we have a Slack connector in Coveo, we're now able to go and index these swarming channels and make them available to the agents for future use.

So, through time, yes, we create knowledge articles at the end of every case that we get that doesn't have a piece of content that's existing, but the swarm channels and the swarm discussion go even deeper than what a knowledge article would cover.

The knowledge article would cover the problem, the cause, the solution, but how to troubleshoot it and having the thought process going into that. There's definitely an added value when we think about content reuse and things like that.

It also helps in new agent proficiency, as they're getting more exposed to this stuff, they can go into the swarm channels, they can read through them and learn on how to better troubleshoot things or how to approach different problems.

## **Martin Schneider**

Super, super cool. That's awesome. I guess the coolest thing is actually seeing it, because I loved everything you were saying when we first had our discussion about this, then I saw it, I was like," Wow, this is really cool." So, if you don't mind, I'd love for you to show the audience just what this looks like, because I think a lot of people are just trying to get their heads around how do we get started?

How can this look? What do these flows look like? If you could just give us a quick demo, that would be awesome.

## **Patrick Martin**

Yeah, sure. Just give me just one second for me to share my screen and I will show you that right away. Okay. So, can you confirm Martin that you see my screen?

## **Martin Schneider**

Yes, I can.

## **Patrick Martin**

Great. This is our development and test environment. As you can see here, we're using the service cloud and we have a case, and this is just a test case where there's a bunch of test data and all of that.

But one of the things, when we said that we leveraged Salesforce functionality, is we use some Apex code to come and add a button right here at the top that says swarm.

So, I'm a new agent, I get the case, I work on it and now I need help. I can just click here on the swarm button. What that does is that sends a call through Coveo.

So, I click the swarm button, Coveo sends a call to the index and says," Okay, these are the SMEs that have been identified that can help you." So, the first three are product specialists.

The fourth one here is the case owner, because since I'm the one creating the swarm here, I need to bring the case owner, myself. Then we bring our product experts that are tied to specific pieces of technology into the mix as well.

If there would be a technical account manager tied to the account, we will bring them into the swarm as well. What I can do here is I can just click yes. And that will create a Slack channel, which is what you see here.

It gives me the Slack channel. Then we also put it in the comments. So, if I look into the case comments and, bear with me if it's a little slow, you see here that a comment has been created by me saying that we now have a Slack channel that has been created for the swarm.

Now, if I move over to Slack, you'll see here then, now that I have a swarm 084129, which is the case that I just created on.

Now, you already see that Pierre has been responding and this is live, this is our test environment. And they knew that we were doing a webinar here. So, I would just say," Hello, TSIA webinar demo, thanks for responding." People can just collaborate here.

One of the things that we do as we create the swarm channel is we bring some of the case context here. So, you see that the swarm bot has brought the case number. There's a link to the case, in case the swarmers want to go and see what's going on, the subject, the different data fields that we want to bring in.

We're working on bringing some more context into the swarm as well, so that people don't have to redo some of the troubleshooting that was done through the case.

As you can see here, people can interact, they can do what they want. We also have a little, an app, a Slack app in Coveo that if we want to do that, I can just do a search Coveo and, let's say, I want to look for a pipeline information.

This is a tool that we've built in there. So, people don't have to leave Slack to search. They can actually search our product documentation, all of our different sources directly through Slack if they need to.

Then once they're done with the swarm, all they need to do is do the Slack command and end swarm. What that does is it renames the channel as archived.

We're not actually archiving it, because if we would archive it, we would not be able to index it, but we rename it as archived so that we know that this swarm is closed and that we have found a solution to it.

Then, if I go into another case, what we would see is this is just a duplicate of the case that I just worked on. We have our inside panel here, which is basically every time something new comes up on a case it's a Coveo tool that helps the agent.

What we see here is that the first document that comes up is an intelligent swarming channel, where I can see some of the discussion. I can look at the thread or I can open it directly in Slack.

That drives the reuse of the content. Then you see, we have other types of documentation that's available through that. But it's just to show you that, when I talked about this closed loop process with our knowledge management tool, that we're able to show our swarming channels directly through our inside panel.

That's basically it for the demo. I mean, it's very easy, quick, and that's what probably people like about it. I know our team likes it, because it's not complex.

They don't have to think it through. They don't even have to worry who's being brought in, because everything is automatic.

## **Martin Schneider**

Very, very cool. I love that you bring that comment in, because that's stuff that even SupportLogic can actually ingest and we can start measuring that against things that people want to do backlogged by swarmed cases or not, things like that.

Really cool. That's awesome. That's really, really cool.

## **Patrick Martin**

Great. So, let me stop the screen sharing.

## **Martin Schneider**

Great. So, we walk through your process, the mindset, we talked about some of the benefits. Before we go into some Q&A and answer some questions.

What are your advice to people getting started? Takeaways? What did you learn throughout the last four years plus of going through this transformation?

## **Patrick Martin**

Yeah, well, that first bullet to me speaks a lot when I say that when it's everybody's responsibility, it's no one's responsibility, and that's what, at least that's we were seeing when we were using the generic Slack channels.

Even when we tried to bring the forums and say," Hey, everybody can go and chime in." If it's everybody's responsibility to go and look, no one's going to do it. So, you need that fallback mechanism.

In some of the companies that I've talked to about our swarming approach, one of the things that they've been saying is exactly by leveraging generic Slack channels and things like that is trying to get people to adopt it and participate and collaborate, it's the fact that someone throws a line in the water and hopefully someone's going to bite and help out.

That's a little bit what our approach addresses is the fact that, when you're being pulled in, you can add value, so you're not always being distracted by notifications in the Slack channel.

Along with that is the whole contact switching. Anybody who's taken cases in their career understands that you are always moving from one thing to another, you're working on a case, the phone's going to ring, there's a new case that comes in, someone's pinging you for help.

You have a meeting to go to, you need to come back. By taking this approach, we've found a way to really draw people's attention to where they can add value and really minimize even some unnecessary contact switching between the case work that they're doing, which is definitely when we talk to the team and we ask them the feedback.

It's something that they appreciate a lot with this model change is the fact that when they're getting pulled in, they know that they can add value and that they can help and they feel recognized by that, because they can actually help.

The third lesson or takeaway there is really, we touched on it on the benefits, and the fact that we're really targeting this collaboration with people who can help, we've seen significant results in both our operational effectiveness and employee engagement measures through that, just because of how it's being received, how it's being used, and the fact that people feel that they're making a difference.

We see it in our recognition program where we have peer recognition and people can dominate things with people who did gone above and beyond and we're getting way more notifications, because people are having visibility in what other people are doing when they need help.

So, definitely that's another key takeaway that we've seen that is a positive turnout of this transformation.

## **Martin Schneider**

That's awesome. One of the things I saw in the earlier slide, you used two words like asynchronous to synchronous. How do you back that up? Looks like you guys are doing it great by really fostering a culture of collaboration, measuring by that, and incentivizing by that.

That's turns that asynchronous," Yeah, I guess I can add value. I guess it's something I can do. I'll get to it." Versus," Hey, this just popped up. Let me jump in there and really make that a synchronous thing rather than asynchronous." Which is really hard to do.

It looks like you guys are doing it the right way.

## **Patrick Martin**

Yeah. I mean, that remains a little challenge, but in the end, we set the expectation that swarming is not going to be an instantaneous thing. So, even if you're being pulled in or you've been pulled into a swarm, you don't have to drop everything that you're doing right now.

You might be working on a Sev- 1 case, you might be in an important meeting. So, we set the expectation is that it's not an instantaneous thing. And when we look at our people who work are different shifts, they're not as many as the people who are on the day shift so they can start swarms and people are going to do the troubleshooting and help them during the night, during the day, I mean.

Then when they come back during the night, they have steps that they need to take. Sometimes they even have the solution that they can share over to their customers. So, it's not necessarily an instantaneous thing, but it is a much more synchronous when people start to discuss and interact in the swarm channel, rather than on the forum, where you'd get notified that someone answered your thread, they could be in your emails, you might get to it a few hours later, versus when you're in the channel, you're there and you're all there and you're interacting with your peers and you're helping your peers with something that you have the skills and knowledge on.

So, definitely, yeah, it's not full synchronous, but it's more synchronous than the previous.

## **Martin Schneider**

Serious, gotcha. That's awesome. All right. Well, awesome, awesome stuff. John, I'm going to turn it back to you to moderate. I know we've probably have some questions coming in.

We'll get to as many as we can with the time we have left.

## **John Ragsdale**

Well, great content. I really appreciate Patrick sharing your best practices and the demo was great. I think it really puts it into from concept to reality, when you can actually see what you're doing.

Not surprisingly, we do have a lot of questions in queue. Let me get started with the first one. Patrick, you were kind of teasing this with your very last statement, talking about shift work.

The question is," Do you take agent availability into consideration when identifying subject matter experts? I mean, if you've got an irate customer on the phone and you need an expert, telling me an expert on a different shift or in a different time zone may not be that helpful.

So is that possible?"

## **Patrick Martin**

Well, I'll take that question into two steps. We don't take agent availability into consideration, because we want to bring the most knowledgeable expert into the mix.

That's why we're not just bringing one person. We're bringing a number of people. So, these people could be on different shifts. So we're bound to have someone who is available at the time that we need to have that person.

Of course, if we just invite one person, that would be much harder to do. So, we don't necessarily take availability into consideration.

If you would want to take availability into consideration using the same approach and the tech stack that we are, you would be able to do it. But the machine learning model that we use to identify SMEs uses case fields.

So, you would need to bring in agent availability or agent schedule from Salesforce into the case. Then we could index that. Then that could be taken into consideration.

It wouldn't necessarily be a perfect match, but it would definitely take it into consideration.

## **John Ragsdale**

Martin, I'd be curious on the SupportLogic perspective on that, because you're doing case routing by subject matter expertise for companies like MuleSoft that are operating all over the globe in different time zones.

Are you able to factor that in?

## **Martin Schneider**

Yeah. We 100% do and we're actually adding, I want to give it too don't want to preempt our press releases and things like that. But we're actually working on better shift management in what we call right now, our intelligent case assignment, we're actually rebranding it to, again, not to give too much away, but yeah, we're absolutely building out that capability of understanding the shifts.

Both either as they stand and what you've already done, we're actually optimizing them for things like swarming or other areas and how you weight and stress who might get an assignment or a reassignment based on things like that.

So, absolutely we're doing a lot of really cool stuff with shift and availability.

## **John Ragsdale**

Cool. So, we got a lot of questions about collaboration and culture change. So, I'm going to try to group these into a couple. The first is measuring collaboration." I've seen companies introduce a collaboration effort score, if you're making this, you're going to have to have some kind of MBO, because if you're not giving them some goal around collaboration, you're not really telling them that's something important to do.

So, how do you measure how individual support techs are collaborating, so you can see if they're participating, not participating, give them a little coaching, give them some rewards.

What are some best practices there?"

## **Patrick Martin**

On our side, since this was an in- house solution that we've built, we're actually at this present time actually working on the backend to be able to capture that collaboration.

The first step in our metrics was identifying," Okay, how many times do we swarm?" So that we can measure the impacts from an operational effectiveness. Now, we will be able to actually capture all the people who are collaborating.

What's their level of collaboration? Who's participating? We're looking at potentially leveraging emojis in Slack to identify what was most helpful, or what was the actual answer to try and determine?

What we really want to do is we want to give visibility on collaboration and build some gamification around it and have a dashboard and make that public and really show people that there is a lot of value and recognition around collaboration.

We also make collaboration one of our awards that we give out annually, we have an award for the top collaborator, which is definitely something that people aim for.

So, it's in our culture to collaborate. It's one of our core company values. So, we put a lot of emphasis around collaboration and we want to give people the recognition, the visibility.

So, we're working on those capabilities right now, to be able to do all of that.

## **John Ragsdale**

I don't know if you guys are familiar with the open customer metrics framework, OCMF, if you in the audience aren't, you can Google OCMF group. But one of the things they talk about is doing a departmental- wide collaboration effort score survey.

Is this department easy to collaborate with, because your subject matter experts extend beyond support. You're dealing with developers. You're dealing with quality assurance.

You could be dealing with product management. I think that also helps, because if you can figure out which are the tougher groups to work with external to support that they may take a little bit of effort there as well.

So, another question around collaboration is that cultural change, and you talked about that and it's the same with knowledge management, getting people to change the way they do things is hard, especially for career support technicians.

So one question is," Have you seen any pushback or adoption challenges from support employees to participate in swarms and collaborate?"

## **Patrick Martin**

Yeah. It's a very good question. I touched on it a little bit earlier and for us it wasn't too bad in terms of pushback.

We actually got people to follow through the project and see the benefits. So, we were pretty lucky on that. But my main response is if you are getting pushback, you have to at what you're measuring in terms of metrics, because what you're measuring is going to drive the behaviors, if you want to drive collaboration, you got to put metrics around that.

## **John Ragsdale**

Fantastic. Well, we do have a lot more questions in queue, but we're running out of time. So, Vanessa, I'm pass it back to you to wrap us up.

## **Vanessa Lucero**

Okay. So, thank so much everyone for the presentation today. Like John mentioned, there are a lot of questions that went unanswered, but don't worry, we will make sure to follow up with you personally.

So, now we've come to the conclusion of today's webinar, a few reminders before we sign off, there will be an exit survey at the end of today's webinar. If you could take a few minutes to provide your feedback on the content and your experience by filling out that brief survey.

A link to the recorded version of today's webinar will be sent out within the next 20 hours. Now, I'd like to take this time to thank our presenters, John Martin, and Patrick, 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, Overcoming Challenges to Single- Tier Support with Intelligent Case Swarming 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.