23.02 WW DWEB - 20 Minutes Twice a Day

## **Ryan**

Welcome to our webinar, 20 Minutes, Twice a Day, Your Prescription for Escalation Management. I see some folks are just coming in. I've got Max Greene with me.

Customer Success Manager, Max.

## **Max**

Hi, everybody. Should we jump into introductions already, Ryan, or do you want to wait a moment?

## **Ryan**

Let's wait a few minutes. I'm interested in where folks are coming from. If you're in the chat, just give us a shout. Let us know where you're sitting right now, where you're joining us.

Max, how are you doing?

## **Max**

I'm good. I'm excited to talk to our customers and prospects firsthand as always.

## **Ryan**

Yeah, me too. Let's just give it a little minute and then we'll jump into the agenda here. I'll throw that slide on the screen.

So Max-

## **Max**

I see some locations.

## **Ryan**

let's see.

## **Max**

Suburbs of Austin. All right, we have quite a few folks in the Austin area.

## **Ryan**

I love Austin, South Carolina. I need to go to South Carolina on a food tour, that needs to happen, and Canada, Pennsylvania.

Nice. Well, welcome. So today we're going to be going over escalation management. We've got a fast prescription on how to do this, and with me is Max Greene.

Judy Platz was going to be with us as well. She had a scheduling conflict, so it'll be the two of us today. Max, do you want to introduce yourself?

## **Max**

Sure. Thanks, Ryan. Hi, everyone. My name's Max. I am a Senior Customer Success Manager here at SupportLogic. I've been at SupportLogic since September of 2021 now.

So I've been here for a little, almost a year and a half. I work with many of our customers. Some of you may be familiar with me already, and I've worked with customers from onboarding through ongoing managements, I help them with achieve success.

And my background, I've worked in support technology as a Customer Success manager for about seven years now, so not just here at SupportLogic, but for a number of other organizations prior to that in the same space.

So I'm excited to talk to everyone today about escalation management and how you can use SupportLogic to achieve some of your goals.

## **Ryan**

That's exciting. I work in Product Marketing here, and when I first heard of your prescription, it really stuck out to me a few months ago. I made a note of it, 20 Minutes, Twice a Day. I just love how succinct that is, so I can't wait to jump in.

To me, this webinar is all about efficiency and making the most of your resources right now, and I think escalations are some of the more expensive cases, and that's what's great about this is, you're getting a real performance play.

You're tackling some of the most costly cases in a quick way, and I think that's great. So this is our agenda for the day. We're going to be making that business case for why escalations are so crucial to avoid.

We're going to dive into the details on how you can calculate what your escalations are costing your business. We're going to address what we call escalation management and what that involves, and then Max is going to lead us through the four step prescription.

We're going to walk through exactly how it looks in the product, and then we're going to leave you with a whole bunch of resources. And speaking of that, just to do a little housekeeping off the top, up in the top right corner, you can see we've got a chat section, and we've got some polls and in Docs, we'll be all the resources that we're going to talk about at the end of the presentation that you can use.

And then in Q& A, that's a great spot to ask questions, and we're going to answer all those at the end of the session. So moving into significant challenges and support, Max, from your experience, what is a reactive mindset do to an organization, and what are the effects of constant firefighting?

## **Max**

So being reactive in support and constant firefighting brings within a lot of the challenges that you would expect. The first of course, being that the problems and the explosions have already happened, and so you're starting on the back foot.

You're having to scramble to pull the right resources in to address an issue that has spiraled out of control and possibly in an all likelihood, could have been addressed sooner had the right resources been involved at that point already.

And in addition to that, when an escalation happens, it's often gone beyond support altogether. You've heard from customer stakeholders who have reached out to you, account executives, account managers, CSMs, your own executive team.

There's so many challenges that it raises, especially from a customer health perspective for you that may have been avoided if you could have been proactive rather than reactive.

## **Ryan**

That's interesting, and looking at this next stat that we have here, I start to think of what are the long- term implications of escalations? How does it break down the customer relationship?

What have you seen in folks that you've worked with through your experience?

## **Max**

Yeah. So the impact of this is definitely multifaceted. On one hand, an escalation, once a case gets to that point of escalation, what you're looking at really is more than just a bad experience potentially for the customer, but also an extremely high effort experience for the customer.

And with effort and with one of the things we call out here is loyalty. And it's often one of the things that we've seen and that I've seen in my experience working both here and with other companies, is that often your customers, it's not that they need to be delighted in a support interaction.

What they really want is to just get their issues resolved quickly and succinctly, and that drives loyalty much more than delights say on a single interaction.

They want to see continued interactions resolved quickly, and they don't want their executives involved. Anytime other folks from the customer's organization have to get involved, you're costing them money.

It's not even just said, an escalation is costing your team all the extra money because of all the additional folks who need to get involved, all of your own, say for example, C- level, your own executives who get calls from customers, your CSMs and AEs.

Every additional person that gets involved drives the cost of that escalation up, which we'll talk about a little bit more momentarily. But then there's another really important piece to this, and it's the health and retention of your own staff, support engineers, agents, support managers.

There is nothing more painful than dealing with an escalation. And as a support agent, when you're not able to resolve a customer's inquiry and maybe you don't get the right folks involved on your side soon enough, it's an incredibly frustrating experience as a support agent to, in a sense, almost fail in assisting that customer and getting a resolution quickly as opposed to having to get everyone else involved, not getting everyone else involved soon enough.

All these things can heavily affect the ability to retain your own support agents and engineers, which is definitely a challenge that all organizations have faced in my experience.

## **Ryan**

That's a good point-

## **Max**

One of the other things... Please, Ryan, go ahead.

## **Ryan**

something I think would be a good time to do is ask our attendees, how many hours are you spending a week on your escalations as a support team?

We've got a poll now that we can launch with that question. I think the poll should be running now, and we can see how folks are spending their time on escalations every week.

I can see here as the results are coming in, some teams are spending 10 hours a week on escalations and some folks aren't really sure.

They're not measuring that yet, which makes sense because I know in my role when hot button issues come in, you jump on them, you have to, that's the role of support and you're not always tracking that kind of thing, so we're seeing a range of answers.

We're seeing 10 hours, we're seeing 20 hours a week on escalations, and then we're seeing some blind spots of how much time it could actually be. I'd love to a launch a second poll on this as a follow- up question to the attendees is, how much time do you think the rest of your organization is spending on these escalations?

And that can be your SMEs, whether it's in IT, whether it's a product person, and then your C- suite as well. The C- suite is a huge part of where escalations often bubble up, especially in smaller companies when that's your chief technical person, and the results on that are-

## **Max**

Do you know what's really-

## **Ryan**

yeah, Max.

## **Max**

do what's really interesting here, Ryan, is that there's a remarkable number of responses here that say, " No idea." And this is interesting because even with some of our customers and our prospects, and customers will see that they often don't have a really fleshed out escalation tracking process, both the management process and the tracking process.

There can be a number of reasons for that. Sometimes it's because they're managing escalations entirely just in email or not centralizing it within their ticketing system or within their CRM, or not tracking it in a structured and consistent way, which makes it difficult to really understand what the cost is of these things to them.

## **Ryan**

Yeah, that's true. And with the blow up of AI and starting to use AI for everything, our solution incorporates AI and how we predict escalations.

A third follow up onto the thread we're on right now is wondering if folks are using AI in what they're doing with escalations at all. That's our third poll I'd love to know about, so we're going to launch that one real quick, and then we're going to get into calculating the cost of escalations and how that's going for folks.

## **Max**

And if we look at this, if we take a glance back at the slide here and we see that for this Qualtrics survey, that 82% of support leaders are actively looking to shift to more proactive support models, and leveraging AI can be a big part of that.

It can be a big part of it because it can enable you to analyze your tickets and your cases in real time and in a sense, get notified when these things are happening, when these challenges are arising, and get yourself off the back foot and start to address these problems before they escalate to the C level, before they have to go through say, multiple tiers of support even.

There's a variety of ways that AI can step in and enable you to be more proactive where you've typically been reactive in the past.

## **Ryan**

That's a part of machine learning I really like. Machine learning really looks at past patterns and then tries to make a prediction for what will come next, and I think it's a great application for AI as an umbrella term with machine learning as part of that, and the results of this are interesting.

Our folks are using AI tools to manage escalations now, and we're seeing that the answer is, no, across the board. So getting into the solution, we're going to show how AI plays a role in escalations, but first I want to talk about the cost of escalations and why we conservatively call it 5x.

Some sources like TSIA say an escalation cost could be even 8x to 10x, right, Max?

## **Max**

Absolutely. And part of that is, once again it falls back to how you track, are you tracking the cost of your escalations today?

And in order to do that, you have to be tracking your escalations, and tracking your escalations goes beyond just tracking them as far as the tickets and the cases themselves and the metrics that you track in your support organization, whether those be the standard ones of case age, case duration as shown here, as well as solution development, bugs, defects, anything that engineering has to get involved in, as well as SMEs.

When you're talking about SMEs, you're typically talking about members of your support organization who have specific skill sets above and beyond your frontline agents and engineers, or also folks from the engineering side who have to get involved to address something.

Every single one of those individuals getting involved drives up the cost of the escalation because their time is valuable. And then even beyond that, calling out potentially the C- suite involvement.

The last thing any one of your leaders wants is to get a call from a C- level executive at the customer organization because not only is that person's time extremely valuable, but the leaders at your organization, their time is valuable obviously.

And then CSMs, AMs, AEs, all these individuals, their cost of working is not typically calculated as part of the support cost.

It doesn't fall under the support organization's purview directly, but each one of them, there's an hourly cost to their time as well. So all these things, which is part of why we start with 5x, but that's conservative.

It can be much, much higher.

## **Ryan**

That's right. And to involve the group watching, we're going to throw a poll at you asking if your average cost per case, and how we have a sample calculation here, and how we look at it is we take your support budget and we translate that to cost per case by dividing that total budget by case volume.

So you take the budget, you divide it by the case volume, you're going to get what that cost per case is. And in this example we just say, let's just make it a hundred dollars per case, so if you take a 5% escalation rate and you've got 20,000 cases, well, a thousand of those cases are going to cost you, if we're using the 5x assumption, a thousand of those cases are going to cost you 500 bucks a pop, which gets you the $ 500, 000 for your annual cost of escalations.

Of course, if you look at these numbers, 20, 000 cases may be low, they may be high for you and a hundred dollars a case may be low or high, but this is a great way to just start looking at what are your escalations costing your organization.

And then what's nice about this calculator. And we have this in the resources tab that you can get to, you can try your own stats, is if you've got 500,000 in your cost of escalations with a 5% escalation rate, and if you bring that rate down to 4%, so if you reduce that rate by 20% down to four, you've now got a cost of escalations of 400,000.

So you're not getting that cash back for your support team, but it's a way to show that you are getting that time back in a way. And escalations are that first step towards a customer churn, so you are saving those customer relationships that can translate to revenue, right, Max?

## **Max**

Yeah, absolutely. And even beyond that to the point that maybe 20, 000 cases annually, maybe that's a low number, maybe that's a high number for you, but also the distribution and the types of cases that those are.

For example, how does your support organization engage with customers as far as what are they responsible for? Are they answering how- to questions? Are they focused entirely on break fix?

And there's a variety. Do they handle billing questions even? There's a variety of different use cases that your support team may be addressing, and most of the escalations are going to fall in a specific bucket of those potentially.

Maybe you probably don't get too many escalations with regards to how to questions that are coming into your spot, and by how to I mean, how do I use this particular feature of the product, those types of things.

Those types of cases are typically handled by your frontline team, don't need to be necessarily escalated, but maybe the much more technical cases absolutely are more likely, are where the escalations are going to live, and those by their very nature are already using your more expensive resources.

They already require your SMEs or your higher level tiers of support depending on if you're on a tiered model or a swarming model, so it really depends on the distribution there.

But then to your other point, Ryan, escalations can absolutely have a long- term impact on customer health on, and that can lead to risk of churn, and so getting ahead of them proactively can help you prevent that.

Or at the least, sometimes it enables you, because we're not saying that escalations are not necessary. There are scenarios where escalations are absolutely necessary, but when you're proactive as well, maybe you can escalate a case sooner than it would've been escalated otherwise, and in doing so, just get the right SMEs involved, the right folks from your side involved prior to it being an escalation on the customer's side where there're executives involved or where other stakeholders are involved.

So there's a lot of different ways to look at that, but the key being is that, addressing these things sooner can drive down your costs and therefore open up time to Ryan's point for your team to spend their efforts on other things that are really more valuable and more rewarding for them.

## **Ryan**

Yeah, that's right. And looking at these poll results, I encourage folks when this call is over to try out our calculator and see what your volume is, what your escalation rate is, and see what a cost is for your cost per case and what you think your escalation rate might be.

Moving into our next part of the presentation here really defining what is escalation management. Max, what do we mean by that?

## **Max**

So when we talk about escalation management, so we've already talked a little bit about what an escalation is. An escalation typically means that so many other folks are getting involved to help drive a resolution on a case after the fact, after it's already on fire, whether those be folks on the customer side or folks on your side.

So escalation management, when we're in a reactive model of support typically means that we're getting all the necessary folks involved, whether those be SMEs, any senior leaders on our side that might need to put in a call to the customer to reduce their temperature.

Certainly, I'm familiar with support executives that we work with that have picked up the phone and called a customer directly, both after the fire has started, but also proactively based on some of the tools and AI that we're helping them leverage in order to get ahead of these.

But the escalation management process, it basically means that you're aware of the escalation, you're tracking it now and you're getting the right people involved to drive it towards an improved outcome.

It's just a question of when you start that process, can you start it sooner by leveraging AI, which is a big part of what we're here to discuss, or are you doing it after the fact where it becomes much, much more costly because you're already in that escalation escalated state?

That plays also into why it is needed, having a fully fleshed out escalation process and tracking it.

I had mentioned that some of the customers and prospects we talked to don't have an existing process, and that was clear in some of the polls as well that we just did.

But in order to understand your cost for escalation, you have to track it appropriately, and that means putting in the necessary flags within your ticketing system, within your CRM, whatever you need to do to have a consistent way of knowing what is an escalation and what is not.

Once you've done that, you can actively start to manage towards an improvement with metrics and KPIs defined around it, which you can only do by tracking it.

You can then look to improve those over time and improve the experience you're providing to customers, and that plays into the third one right here.

What are the outcomes? Once you're tracking this, you can start to measure, and once your cost per case, you can start to measure which direction am I trending in.

When you first start tracking it, you may see that the picture is a little uglier than you would like it to be, but now that you're tracking it, you can drive towards those improvements. You can drive to reduce that escalation rate.

You can drive to reduce the cost per escalation simply because you're getting ahead of it, so these are some of the different factors that play into escalation management overall.

## **Ryan**

If I was new to this, I think I'd be really interested in customer proof. Who is this working for? What have you seen out in the field?

We're about to dive into some really hands- on stuff in a second, and so before we get into there, I'd love to hear about who is this working for and what have they seen?

## **Max**

So we have a number of customers that are following these types of workflows that we're going to dive into and talk about.

For anyone here who, who's actually looked at the logos on our website, you'll know that we have a variety of customers that are very well known throughout the industry, whether that be Clik or Fivetran or Salesforce or Palo Alto and variety of others.

All of them have been using our solution to leverage AI to move from a reactive model to a more proactive one. So a lot of the statistics and results and outcomes that we're going to be talking about, which typically fall into the realm of escalation, escalation reduction, improvements to customer experience, whether that be CSAT, customer effort, and then also improvements to efficiency, and by efficiency I mean, giving your agents, your engineers and your managers some time back.

Another really interesting outcome that we've seen is that by using SupportLogic's AI and some of our NLP in particular, it's allowed some of our customers to spot where their own customers are being abusive of their agents in conversations.

And those are things that those agents and engineers might not have raised with their managers, but they have an absolute impact on morale, and so that plays into agent retention as well.

So at a high level, these are some of the outcomes that our customers are reporting and seeing, and it's something that we're excited about because often it's taking...

Some of these things are not things that we foresaw, we didn't necessarily foresee all of these types of outcomes. So every time our customers are using our solution, they're telling us about ways that it's driving their customer experiences in a better direction.

## **Ryan**

That's really cool. Let's jump into the workflow. Let's show the four steps and really go through the parts, and I think first of all, let's define what some of these terms are that we're talking about needs, attention and what alerts are and stuff like that.

## **Max**

Absolutely. So one of the core capabilities, one of our core value propositions is leveraging NLP to understand the voice of the customer.

That's a language processing, a component of the AI that we offer within our product, surfaces of variety of signals. I believe it's over 30 of them.

And when I talk about signals with regards to NLP, I'm talking about the analysis that we do of all the written text in your tickets that highlights the sentiment of the customer, and the sentiment of the customer that can be positive, that can be negative.

A customer expressing that they are frustrated, that they are upset. A customer saying that they have a critical issue or that their production system is down, or as simple as customers asking you to schedule a call or asking for an update on a case.

All of these are just some of the signals that we detect. Another one that I always love to highlight is we detect a confusion signal.

When your customers are confused, are they confused because of poor documentation? Are they confused because your agents or engineers are not providing succinct and clear answers?

So there's a variety of signals that we detect that you can then, as a manager, help your team reprioritize their efforts to focus on the customers where these signals were detected on their cases.

So think of signals as a lot of the NLP that we're talking about. That's what we mean by needs, attention and negative signals.

Next. Looking at these... Yeah, go ahead, Ryan. Were you going to-

## **Ryan**

No, no. Sorry, I was going to tee you up.

## **Max**

yeah. So one of the important things here also, so I do want to call out that you'll see on each of the four steps in the prescribed workflow here that I mentioned, take action.

And so I think it's important to define what we mean by take action. Take action very much falls into potentially escalation management.

Like what are the standard operating procedures that your teams follow to drive a case towards an improved outcome when it is at risk for any number of reasons?

There's the component of take action in our platform, which we're going to talk about momentarily, but then there's also the actions that, and the playbooks that most or support organizations have already built out, what do you do in this situation?

What do you do in that situation? Who needs to be involved? What we're trying to do is highlight where you may need to start those processes in order to drive better outcomes for your customers, so that's what we mean by take action.

And I touched on the needs, attention and negative signals, but the other concepts here, escalation predictions, which is also part of our core value proposition, which takes ARA which goes beyond just the NLP to analysis of all your cases historically in the metadata to look for patterns as to why cases have escalated, when cases escalated, all of those things.

Finally, the other things that you'll see here, take action on backlog based on list views. As being part of support organizations, you're all very, very familiar with your backlog.

The cases that your agents and engineers are working on, looking at those in different ways within your ticketing systems, but SupportLogic provides additional ways to look at your backlog, different from the way you typically do so.

And then finally, alerts. We know very well that tool fatigue is a real thing. Your teams, your managers, they cannot be in SupportLogic all the time, so how do we empower them with the early warning capabilities of SupportLogic to know when cases are at risk even when they aren't in the platform?

And we do that with extensive alerting capabilities, which we'll touch on as well.

## **Ryan**

And let's just touch real quick on outcomes, expected results. You-

## **Max**

Absolutely.

## **Ryan**

yeah. Sorry, go ahead, Max.

## **Max**

No. So these are specific results that we've seen other customers of SupportLogic achieve by following some of these workflows or similar workflows inspired by these, I had mentioned earlier, reduction in escalation rate.

We've absolutely seen customers reduce their escalation rate by 20 to 50% in a three- month period. Obviously though, in order to do that, there's a level of adoption of our capabilities of these workflows that needs to happen, as well as following the procedures that you may have in place to drive cases towards an improved outcome.

But by leveraging SupportLogic to get ahead of these things, we have seen a 20 to 50% reduction in escalation rate for many of our customers. I talked also about productivity gains before.

We've heard directly from our customers that this can be as much as an hour per day for each support manager. The reason being is that they're not reading through all of their cases looking for the problem ones.

SupportLogic is pointing them to the cases that are at risk, and so rather than have to read through 10 to find two or three where there's a problem, SupportLogic can point them directly to those two or three, so that's one of the key things that we do.

And if they're not reading through all those cases, they're saving a lot of time because most of your cases are going to follow their normal life cycle to resolution.

It's finding the ones that aren't before they get out of control that is the key issue. Finally, the third one here, improved overall CSAT scores, as well as I call out prevention of DSAT surveys.

DSAT is just in a sense, the reverse of CSAT. It's dissatisfaction surveys. The reason that matters is that it can be hard to move the needle on your overall CSAT score.

You may have a 95% CSAT or a 94% CSAT score that is within the range of where you want it to be, but every single interaction actually matters.

And so that's why when we talk about DSAT and individual surveys, individual responses from customers, we're talking about each of those instances where things don't go according to plan, and by being proactive, you can potentially get ahead of those and prevent them, so those are some of the results that our customers have seen.

## **Ryan**

These two boxes on the right side stand out to me because when I talk to prospects, they talk about their teams are on a hiring freeze. They're not getting any extra agents, their support managers now support more agents than they did before.

They're now expected to hit or exceed the same CSAT levels as before but with a smaller team or constrained resources, so I think the timing of this is really important because to me, I think this year is all about performance and getting the most out of the resources that you do have.

And so I think-

## **Max**

Yeah, you are absolutely right.

## **Ryan**

Max,.

## **Max**

You're absolutely right. We've seen across the board that, and there've been layoffs at a number of major tech organizations, and those have impacted many, many support works within those.

So doing more with less is incredibly important at this time.

## **Ryan**

If you're a large org, you've maybe experienced a layoff, you're having to do more with less. If you're a small org or a startup, the ability to raise cash right now is very tough.

So you're also not bringing on resources, so it's an interesting point in time to make the most out of your team. And I think with that, getting into the actual four steps here and the first one, which is all about what we call the support console with step one.

## **Max**

And the support console just for... And we'll dive into the platform shortly, but the support console is your command and control center.

It's where most of our customers, where a support manager, a swarm lead, an escalation manager might kick off their day when they log into SupportLogic at the start of their shift, for example.

And it lets which cases have had some activity on them in a recent timeframe where we might have detected some of those needs, attention and negative signals, those NLP signals, and then by doing that, highlighting those, as a support leader, you can quickly see where you might need to reprioritize your team's time.

Your agents may be heads down working on one thing, they've got a backlog of 20 cases. They're not always seeing exactly everything that's coming in all the time. But as a manager, if you're starting your day in here, you get the lay of the land quickly and you can shift resources where needed to focus on cases that might all of a sudden be at risk that weren't at risk yesterday or the day before.

So that's very much what we're talking about when we're looking at this view.

## **Ryan**

That makes sense. Let's get into step two.

## **Max**

Right. So step two falls into some of these specific escalation management. Now, step one is in a sense also escalation prevention because you're jumping on cases that have negative sentiment detected upon them, but the additional piece of that is, SupportLogic provides a very clear AI generated escalation prediction capability.

And so what that actually means is escalation prediction... First off, we've analyzed all of your cases, and so based on all of that history, we have an idea of what cases have similarities to escalations that you've had in the past, and so we're highlighting those here as escalation predictions on this particular page within UI, and then you can take action upon those from here.

Take action once again meaning, what are the SOPs that you follow to drive a case towards an improved outcome, and leveraging those on a case where you might not have started them until seven days from now when it's already too late.

We're pointing them out to you earlier so that you can take those actions now, and so this is the second step. And if you're an escalation manager who is specifically targeting proactive escalation management, in your case, maybe this is the step that you start on, but the combination of all of these is how we get proactive in what's typically been a reactive market.

## **Ryan**

One of my favorite parts of this is the sharing and the swarming and how you can bring in folks from outside the CRM from anywhere in the organization.

You're saving on those licenses, but you're also giving them the full context. You're getting the experts involved early because you're getting the prediction, but then you're getting them involved completely as well.

## **Max**

Absolutely. So taking a look at the cases here and seeing the ones that we're pointing out, which is already helping you with that productivity game that we're talking about because as a manager, you're not having to read through all of them to find these, but then taking action involves getting the additional folks involved that you need to, and you can do that right from within the UI here by using the share function within SupportLogic.

You can at mention individuals via whatever messaging channel you're using, whether that be Slack or MS Teams as well as by email, and draw their attention to this case, and it doesn't have to be just one individual, it can be several.

Now, anyone who can help drive this case towards an improved outcome, who has the needed skills and experience to do that can be looped in on a moment's notice here to take the appropriate steps needed.

## **Ryan**

We're two thirds all the way through our time. Let's jump through these last two steps in the prescription and let's jump into the demo, and really get to that.

So with this third step about backlog, what do you think, Max?

## **Max**

Yeah. So this is actually pretty straightforward. As support leaders and support managers, you're already used to within your ticketing system looking at list views of your cases, but what SupportLogic does is it allows you to look at list views in slightly different ways from how you have in the past.

We have a sentiment score and the needs attention score that's defined based on some of those signals that we were talking about earlier. And by taking a look at the list views that we have here, you can maybe target taking action on cases where the customer is in a negative state or has a scenario going on where their issues are critical or a variety of other different situations that might require attention, and this is different from the console in that this is showing your entire backlog.

So after you've taken action on some of the stuff that just happened that was just happening today, you may want to look at older cases, and that's what you can do here.

## **Ryan**

And then with alerts, why do you need these?

## **Max**

Because you may only be able to spend 20 minutes twice a day within SupportLogic, and so above and beyond getting the lay of the land at the beginning of your shift, maybe in the middle of your shift, configuring alerts allows you to be notified based on all those scenarios that we talked about in step one, two and three.

It allows you to be notified via Slack, via the MS Teams, via email, whatever channel you're using, and then you can take those actions and be proactive even when you're not in the tool.

Awesome.

## **Ryan**

Well, that's great. I'm going to stop sharing. I'm going to share my screen and we can get into the product a little bit.

All right. Can you see my console, Max?

## **Max**

I can.

## **Ryan**

Great. So I know step one starts here in our console. In the console it's pulling out cases that needs attention and showing you why with the customer signals right here on every card, you can see the text that shows why these signals are called in.

What do you think about this part of the console?

## **Max**

Yeah. So as we mentioned, it's your command and control center. The console allows you to see cases that have had some activity within a relatively recent timeframe.

So right now, the date range here is set to cases that have had activity today, but you can look at this and the reason you might set it to today or since yesterday or last seven days, maybe at the beginning of your shift, you're setting it to since yesterday.

So what's happened on critical cases that have come in since the end of your shift the prior day, and we're highlighting here, both cases that have needs attention signals, the ones that have negative sediments, and you can see those in the tiles above.

And by clicking on any of them, you'll see the list of cases below, you'll see the specific signals highlighted in the span of text that we detected the signal upon, and then from here you can go directly into the case itself, and from there you can quickly see what was said that caused the signal detection.

By clicking on the signal, it will jump you to that point in the case, and then you have that option to share directly from the top right corner. Maybe you want to share with a variety of SMEs, anyone who could help you drive this case towards a faster resolution.

And then in addition to that, just briefly, you see at the bottom also you have the option to reply directly to the customer or add an internal case note. Maybe you want to do the work directly on the case in that way, maybe you want to add an internal case note, bring folks in that way, so there's a variety of different ways.

And when you do so, all that information passes immediately back to your CRM, to your ticketing system. Replies, internal notes immediately reflected and stored in your system of record.

## **Ryan**

That's right. And then so step two, moving into the escalation board.

## **Max**

Absolutely. So escalation prediction is one of the key things we talked about, and escalation prediction is really interesting, partially because it goes way beyond just NLP.

NLP is was the needs, attention, the negative sentiments, all of those things, but escalation prediction not only takes that into consideration, but it also looks at the history of your cases.

It looks at the metadata, it looks for patterns, and it finds cases that correlate well with escalations you've had in the past, and that's what we show you here. And then you have all the same options that we talked about on the console where once you take a look at these, you can see what some of the factors that played into us predicting it as likely to escalate, and then you can share the case directly with an SME.

You can reply directly to the customer, you can add an internal case note. Whatever your standard operating procedures are for taking action on a troubled case, you can start those here and then continue that work in your ticketing system, in Slack, in MS Teams, wherever your teams are collaborating, you can start it here and continue it as needed wherever that is.

Before you jump to the backlog, let's actually jump back there real quick. One of the things we talked about with regards to productivity gains and something that some of our customers have called out specifically is that, having to read through 10, 15, 20 cases looking for the troubled cases, by leveraging this we're pointing out specific cases with specific risk factors, and we're calling out what those risk factors are.

So your team just has to take a glance here, spot these, and go through them quickly and take action where needed without having to read through the ones that may not have any issues, but that they would've read through anyway since they had no easy way to track down where the problems were.

That's the beauty of AI, is that it's finding these for us and then we take the next steps. You're the expert as a manager, as a support leader, your business, but we're pointing these out so that you can take the actions as needed.

## **Ryan**

That's right. Someone in the chat was saying they have three escalation managers. If you've got three escalation managers, that's a sizable resource, and this is a way to surface the cases that they need to see without them having to read every single case.

## **Max**

Absolutely.

## **Ryan**

And they're seeing the factors. So moving into part three is all about backlog and these two main levers that we use in the product. So Max, if you want to talk about those?

## **Max**

Yeah, absolutely. So as support managers, support leaders, you're very familiar with list views. You use them in your own ticketing systems. These are additional, these are list views that we surface in SupportLogic, but that use some additional mechanisms for sorting that, some of which you haven't used in the past.

Sentiment score, attention score, these are based off of all those NLP signals that we talked about as well as the cadence of communication with the customer, all those things play into the calculation of these scores.

But a customer that has a low sentiment score on a particular case, that case may be at risk, and maybe you want to reprioritize certain members of your team's time to take action upon it to drive it towards an improved outcome.

And once again, you open up the case here, you can use the sharing capabilities, reply to the customer, add an internal note, variety of ways to take the necessary action to drive it in the appropriate direction.

And then also above and beyond the NLP list that we're showing you here based on attention and sentiment score, you'll see we have a list for case age. So if you simply want to look at your cases by age, but also have the AI and NLP factors visible on the case, which you wouldn't have if you were looking at in a ticketing system, this enables you to do so.

A variety of different list views that you can use. These are just four, but there's approximately 10 out of the box ones that you can add. And you can also filter extensively to determine what you're going to show in these lists.

Using any tool, any application, filtering is critical, so scaling down the view to focus on the cases that fall specifically under your purview as a support manager, whether that be specific teams of engineers, specific product lines, a specific built of business, if you're a TAM, there's a variety of use cases here.

If you're an escalation manager, same thing. Which are the cases that you're responsible for specifically, and let's build, and you can build filters here to create the views that you need so that you're focused on what's important to you.

## **Ryan**

That's right. Let's move to alerts.

## **Max**

Finally.

## **Ryan**

Yeah.

## **Max**

Finally, all the great things that we were just talking about, once again, you can't be in SupportLogic all the time. So a big part of standing up SupportLogic and getting our customers onboarded is providing best practices around the configuration of alerts.

So needs, attention signals, sentiment signals, you can create alerts that notify you when those are detected on comments from your customers. That way, even when you're not in SupportLogic, you can get the value that you need out of it.

You can still be proactive, and it's as simple as drag and drop as Ryan is showing right here. Same thing applies for escalation predictions.

You can create alerts based on that, and there's also a variety of other conditions you can add to these so that they're more targeted. You can add conditions related to your metadata, firing off the alert when, say it's been two days since the last outbound message from a member of your team.

Maybe you want to follow up with the customer again, in particular on a case that had negative sentiment on it. So there's a variety of use cases that can be met with our extensive alerting, allowing you to be proactive, whether you're in our platform at that moment or not.

We're always providing you that early warning system that you need.

## **Ryan**

I love how we fine tune these because if you look at this right panel here, there is so much, there are so many options with fine- tuning these alerts. You can get down to the customer level, the engineer, case events.

I mean, if you've got different folks in your organization working in different areas, you can really fine tune the things that they are getting sent which is so cool.-

## **Max**

Absolutely. I know we're running a little short on time, but one last thing that I did want to point out there right is while the SupportLogic console is used by managers, with our alerting you can extend that capability out to your engineers and agents.

You can notify case owners directly when certain conditions are met, so the burden is not entirely on the managers, but you can leverage the extensive AI capabilities to make sure that the agents and engineers are proactively getting ahead of things as well.

## **Ryan**

oh, that's a good point. I just want to flash up our key takeaways from this. 20 minutes twice a day is really what this prescription takes, and these are the benefits that we see real customers getting.

We're going to come back to the screen in a second. I just wanted you to be aware of the resources that we have going along with this. We've got an ROI calculator that will help you calculate your own cost of escalations, and then we've got some workflow instructions on all the stuff that we went through, and how if you're an existing customer, you can set all this up with the assistance of customer success and our onboarding team if you'd like, or if you want to do some of it yourself.

And then finally, a plug for SX Live. This is a conference that we host that is the only conference that is hosted and put on by customer support and success for customer success.

We bring in industry heavyweights and we talk about success stories, and we talk about insights and great learning opportunities. And it's really a great place, either virtually from June 13th to 15th, or in one of our city locations to meet and network with customer support professionals like yourself.

I highly encourage you to go to SX Live and find out more. All these events are free, and if you're in one of these cities, please come out. We stack it with incredible leaders from across the industry, working in amazing companies and sharing their stories.

Just getting back to our key takeaways, I want to use this area to dive in these last few minutes into some Q& A. Max, I see we have a few questions here. I'm just rolling over to them.

One question that we got from the field is, what if we don't have an escalation process now?

## **Max**

And it's a great question, and you wouldn't be the first prospect to come to us that was in that situation.

A part of this is figuring out what an escalation management process looks like, and part of that, as we discussed a little bit earlier, it's first off, we have to start tracking them, so we need a source of truth for our escalations.

Ideally, we move that out of just back and forth emails that are going on, and Slack and messaging channels, and we get it directly into our ticketing system so that we can flag that the case is escalated directly.

Once you're doing that, you can start to measure your escalation rate, and once you've done that, we can start to talk about how you can leverage SupportLogic and the workflows that you can perform in it to drive improvements, to drive improved outcomes on those cases.

So building an escalation management process if you don't have one, and you do have escalations, obviously we know that that's the case, but we can absolutely discuss with you what building an escalation management process looks like, how to go about tracking those things.

Because once you do that, that's the first step to being able to drive improved outcomes, to drive escalation rate reduction to getting proactive. Tracking these things is first, and then building the processes and workflows to improve them is the immediate next step.

## **Ryan**

Oh, that's great. Our next question that we have from the field is more of a technical question. What is included in this machine learning model? I think more and more as AI becomes popular, folks want to know what's under the hood?

What is part of this, what parts of their cases are we reading and using to make these predictions?

## **Max**

Absolutely. So we touched a little bit first on the NLP. Think of our AI as in... I mean, we have a variety of AI models that play into everything that we do, but the key ones when we think about escalation prediction, it's taking advantage of not just the NLP and the voice of the customer that's extracted from all the written text, but it's also looking at all the metadata associated with cases.

As part of standing up SupportLogic, we're ingesting your cases historically, at least a year's worth of data. Sometimes two years worth of data, and so we know what escalations have looked like in the past.

What that means is maybe the majority of your cases escalate between day four and day six. Maybe the majority of your cases escalate when there's four or five conversations on a case.

When we start to see those trends, we can leverage that in predicting that a case based on those factors is getting more and more similar to cases that have escalated in the past.

And that allows us to point out that those cases might be at risk, to predict that they might escalate. So the escalation prediction goes well beyond NLP, and it leverages all of your data to understand where cases are at risk.

## **Ryan**

And I think what's great about all this is the time savings, and I think because I like polls, we're just going to do one more poll here at the end and ask folks what they think they would do with this extra time, whether they're saving five hours a week, whether they're saving 20 hours a week.

What are they going to do with that time? I know for me, I'd be eating more ice cream, but you don't have to-