22.06 NA WEBR - Improving SX with Intelligent Swarming

## **Vanessa Lucero**

Hello everyone, and welcome to today's webinar: Improving the Support Experience 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 your 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. Our 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.

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I would now like to introduce our presenters today. John Ragsdale, Distinguished Researcher and Vice President of Technology Ecosystems for TSIA.

Marilyn Lin, Vice President of Customer Support Experience for Mulesoft. Martin Schneider, Chief Evangelist and Head of Solutions Marketing with SupportLogic. And Francoise Tourniaire, author of Art of Support, and Founder and Principal of FT Works.

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. You picked a great day to join. Not only do we have one of the hottest topics in Support today, Swarming or Collaborative Support, but we've got three Silicon Valley and CRM experts, longtime veterans of this industry on the panel today.

So it's going to be a really great discussion. So I'm sure you all know what swarming is, but just for the uninitiated, a quick definition.

And we'll definitely be diving much deeper into this moving forward. But swarming, also called single tier or collaborative support, means that one support technician owns that incident from cradle to grave, instead of forcing customers through that painful pass off and escalation and level one, level two.

If it's not a topic that they're an expert on, other experts swarm in to collaborate on, resolving the issue. There's a lot of benefits here not only improving the customer experience, but it also allows employees to learn and grow and get promoted at a faster rate.

So currently, we're seeing about 30% of our members are using the single tier or collaborative support model. It has been steadily increasing.

The first time we measured this was 2016, and only 20% of companies were doing it. So it is a, I would say a pacesetter practice, but we are seeing a lot of very large organizations embracing this model.

The reason is there is a lot of business value here. So the correlations we're doing with our benchmark information is showing four specific metrics are definitely improving and higher for companies that are embracing swarming on the employee side, higher average employee satisfaction and lower attrition rates.

And on the customer side, higher post- interaction customer satisfaction, or CSAT, and improved customer effort scores. And of course, if you haven't heard my lecture on effort scores, we're finding that effort scores are the single biggest driver of renewals and expand selling.

So if you are not focused on measuring and driving down customer effort, hopefully we'll motivate you today to start. Now, I would like to turn things over to our moderator for the panel discussion today.

Martin Schneider is the Chief Evangelist and Head of Solutions Marketing for SupportLogic. Martin, take it away.

## **Martin Schneider**

Great. Thanks, John, and thank you Vanessa. And thank you all for joining. As John talked about, it is a really interesting topic. It's a very much a hot topic. A lot of our customers are asking us about how do we get into swarming?

How do we do it easily? How do we just get started? And doing it not necessarily wholly migrating over to a multi- tier approach...

or from a multi- tier to a single tier approach, how can we do this in a phased approach? So I've brought on two really awesome guests with me to talk about that.

FT, why don't you quickly introduce yourself and then let's get started with some of the stages that we're going to talk. We're going to talk about three, I think, really great getting started tips.

So FT, why don't we kick off the first one and maybe do a quick introduction, given your experience in the support world and with swarming.

## **Francoise**

Thanks, Martin. So my name is Francoise of FT. I wrote a book called the Art of Support that has had a lot of success, and I'm delighted with that.

And I'm also a consultant for the industry. So when I talk about these three points, I'm really talking about the experience that my clients have had.

So I'm talking about dozens of experiences. So let's talk about the first point. The first point is that, it's great to do swarming.

Do swarming is a good idea, but really step one is knowledge management. As I say, in the Art of Support, the savvy support manager knows that knowledge management is what support is all about.

In other words, we think of support often as managing tickets and cases. It's really about making sure that the right knowledge is there for the customers, for the internal players at the right time.

So do that. Clearly KCS, Knowledge Centered Support is the current kind of gold standard. So I think that's what everybody should be doing.

And the idea here specifically to swarming is, every time somebody asks for help, right, that particular knowledge needs to be encapsulated in some kind of a knowledge object.

So either it already existed and then I didn't see it, which is kind of a problem. And maybe it's a problem about me, but maybe it's a problem about the actual knowledge object, right?

That was not findable, or I'm going to create something new. So that's, that's what we mean by start with knowledge management is, make sure that if you don't already have a good knowledge base, you establish it as part of the swarming.

## **Martin Schneider**

Great. Now, now Marilyn, quick introduction to yourself, but in addition, why I thought it was great to have you on the webinar is, you're starting, you're not starting, but you're in the throes of really doing a transformation into collaborative support at MuleSoft.

So why don't you take us through a bit of that and then tell us a bit how you're using knowledge in the collaboration process.

## **Marilyn Lynn**

Right. Thank you, Martin. So hi everyone. My name is Marilyn Lynn. I have been with Salesforce for 14 and a half years. I didn't take the traditional path into a career in Support.

I actually started my career after undergrad in IT Auditing with Ernst& Young, also moved into Oracle in their Internal Audit group.

When I joined Salesforce, I came in the technical program management team, and was a program manager there. I became a product manager before moving into our Customer Success Organization in the Renewals team, running renewal strategy and operations, then have the opportunity to move into Salesforce Support team as a Chief of Staff.

And I think getting exposure, especially during a time of transformation in the Support Organization, I really felt it was the place for me to continue to grow my career taking on a lot of my experience having been in product.

I like to say that if I'd known what I know now, when I was Product Manager, I would've really partnered much strongly with the support team, because there's just so much valuable insight that come from the support organization about the way customers are leveraging and using the product.

It's really important for the product and engineering team to be able to take in that input, basically a treasure trove, right in house, in your organization to tap into those insights.

And then my journey took me over to MuleSoft support. And 18 months ago, I stepped in to head up and built out the MuleSoft Support Strategy Operations team.

Before more recently stepping into the VP of Customer Support Experience for MuleSoft. And it has been a transformation journey for us, previously, for those of you who have been a member of TSIA for quite some time, you probably are familiar with Judith Platz.

So when Judith was the VP of new Self Customer Support, she laid out her vision and strategy for the team's transformation.

And one area was to bring on intelligence swarming, but before we were able to move into implementing swarming with the team, we had to take a step back and actually go through a few different changes in the organization before kicking off swarming.

So we started out with moving away from a tiered organization approach to a tierless approach. We also moved away from a regional org structure to a project aligned org structure, allowing us to have our support engineers to be focused and dedicated to specific products, so that they can continue to be experts in that particular product area, versus having the expectation to know every single product that we have and just the rapid pace of development and releases.

It's really hard to expect somebody to have that deep breath of knowledge around all our products.

Having that org structure set up. The next area that we dove into was making sure that there was a strong foundation built with knowledge management.

As mentioned here, we focused on rolling out the knowledge center support within the organization, starting out with training and enablement, and then embedding that knowledge first into the culture of the way that we approach case handling that everything needs to go back into our knowledge base and allowing us to feed into the whole self- service model as well.

So when we approached both the knowledge management and the swarming initiative, we actually engaged a third party consulting vendor, Clever Insights to help us work through that with their guidance.

So with swarming, they brought to us the swarming using the KIT principle, which stands for knowledge, knowledge first, continuous improvement for the I and team based measures.

So knowledge versus making sure that knowledge is in real time. It's not an after the fact piece of the puzzle here, it's when you go into initiating a swarm, the idea is that you are already creating a draft in your knowledge base as a placeholder, making sure that any new information that needs to be captured as you're swarming the case is put into the draft.

And then once the case is closed, going back in there, cleaning up the documentation before it gets published. And then when you have a KCS model already in place, it just folds into that model of maintaining the documentation as part of the process and the continuous improvement side of it is making sure that we identify members on the team who are swarming coaches, who will go through each swarming engagement and take a look at areas where we can continue to improve the swarming process.

So it's not the siloed approach, where a team comes together to swarm a complex case. And then once they're done, it's done, it's that continuous model of making sure that we learn from every swarming engagement and take that back to the team.

Also, we are measuring all of this through team based metrics instead of individual metrics. They include customer effort, the employee effort, how to make it easier for each other on the team, a collaboration effort score as well, making sure that each swarm is energizing the team and not draining team members, who are getting pulled in to participate in the swarm.

And then also tracking the same day next day resolution as well, to see how well we are making sure the time to resolve is actually improved as part of leveraging the swarming model.

And eventually time to competency as well as a way to measure, especially when we have new hires coming on board, how does the swarming model help the individuals gain knowledge and speed up their onboarding as part of that?

## **Martin Schneider**

That's awesome. And, and I love to see that it's policy, it's not just recommended to create the knowledge with these collaboration requests.

It looks like it's... Like you said, if you haven't started the article first, that's really great. One of the things that I love about what we do to make it even easier to create that knowledge, is to find those interesting moments and put them together in acute little kind of timeline so that, the agents and the managers don't take as much time to put together what they need to make that easier.

To move on, that was such an awesome overview. But let's go the next one. FT, you want to walk through this, because I think this is really nice in the kind of the culture side of it, of how you enable the initiation of swarming.

## **Francoise**

Sure. So we often say we support people. We often say support is a team sport, but when you look at reality, often support is a very lonely sport, right?

Where people have cases and they have to close their cases and that's the way they're measured, right? So we really need to break that and it needs to be done in two ways.

First there needs to be a process to do this and to do this easily, right? How do I ask for help? And then there's the psychological side of, it's okay to ask, right? We're all in this together.

It's not like you have to go and score that goal by yourself. Right? We are we're together. We're we're going to do this. So in terms of how to ask for help, often we think of it as a reactive thing.

I have a case I'm stuck. What do I do now? Obviously that's very important to get that right. But I also think it's super important to have alternatives to that.

For example, every day, maybe twice a day, have a quick huddle where we just bring the difficult cases. It could be virtual, it could be in person. We just bring the difficult cases and we very quickly generate ideas together that could be led by, Marilyn was talking about the swarm leads, right?

So it could be led by these highly knowledgeable folks. Sometimes it could be held by managers as well, but I think a technical person is the best way to do that. You can have office hours, so you can have other ways of helping that are not just one to one and reactive.

And I think if you do that, that becomes normal, right? It's, it's absolutely normal and natural to ask for help and to give help.

## **Martin Schneider**

Great. So Marilyn, how are making it easy, so to speak, I mean, is it just, everyone's on board? Is it a culture thing? I mean, how is the policy work to make it easy for people to ask for help?

## **Marilyn Lynn**

Yeah. So for us, we have a very collaborative culture and environment. We encourage participation. So it's not something where the swarming initiative is a top down push and that we have everything established and we roll it out.

The way we approach this was we actually identified one of our product support teams, because we have broken it out into product alignment.

We focused on one product support team. And within that it's a global team. We identify the team as a pilot, as a pilot group. And then we also have a separate group of individuals who are really passionate about this swarming topic that joined us in the working group.

So together with these two teams and also the Clever Insights consulting team, they all got together in understanding the principles behind how we were going to leverage KCS, the KIT principle, what type of training and enablement we would need to put together.

Clever has some strong training behind the kit model in place. So the team went through that and the working group would put together the process, kind of designing and outlining.

This is how they were looking at implementing the swarming model for us. The pilot team will go through it, share feedback, and then it was an iterative process of folding in the feedback, to put together what the swarming model needs to look like.

We are just in the phase of wrapping up the phase one rollout to two other product support group teams, and recently kicked off phase two to roll it out to the rest of our new self global support team as well.

And it's all about the collaborative rollout of this initiative. So from the get go, it was getting members of the team brought into to the fold and also making sure that there was participation from members of the team, having input, going through trial and error of the design of the process and feeding that back in.

And we'll continue to take the feedback and learn through the rollout and make enhancements to it as well. But I think because we started out on this transformation journey with the understanding that we needed to go and do the knowledge first approach and embedding that into the culture, we always talked about swarming as that next layer to layer on after we have the KCS model in place.

And we actually established this initiative with a guidepost statement at the very beginning as well, to get everyone aligned on it.

And then a clear understanding that our statement is, if issues require further collaboration, beyond our standard support process, we will use swarming in order for us to reduce the time to resolve and also reduce team effort to get customers issues resolved timely.

So it was kind of like all in with participation from the team and then just breaking it out into phases. So you can learn from the initial phases before you do a full blown rollout across the organization.

And the way to normalize collaboration for us is like we actually leverage a system, a handy tool that Salesforce had acquired, and we actually leverage Slack and have integrations built so that if someone needs to virtually raise their hand and ask for a swarm to be kicked off, they just initiate that Slack integration and kind of go through that process of engaging others to help with swarming.

## **Martin Schneider**

Excellent. Yeah. One of the things that, when our customers are onboarding with us, they love, is they can start any kind of swarming initiative pretty quickly because of the Slack integration and the beauty of Slack is it brings anyone from the organization in and allowing them to quickly see the relevant case information through SupportLogic is really cool.

So absolutely a huge, huge gem to have when you're starting a swarming initiative, is that tight integration with collaboration tools like Slack, because it makes it easy to do the ask.

Right? Right FT? Of course. Awesome stuff. Let's, let's move on to the third point, which is an interesting one, which is, manage the backlog, because it almost sounds kind of counterintuitive FT.

So love for you to go through this because, if we're swarming all the cases and we're solving them so quickly, how will we have a backlog? Right. But of course that's not always the case. So you want to walk us through this one FT.

## **Francoise**

So this one is the dirty secret of swarming, before swarming, if you have a tiered organization, what happens is that every lower tier can throw things over the wall when they don't know what to do with them.

And so the backlog happens up, right? If you are in a tierless organization, then everybody's going to have a backlog, right? Because you can't throw things over the wall anymore, you've got to work on them.

So, that means that managers at all levels really need to manage the backlog. And by manage the backlog, I don't mean just look at the last time the case was updated because I could just update my customer every day and say nothing, and make absolutely no progress.

So managers really need to dig in and figure out what is happening in this case, is this support engineer stuck for whatever reason, what is the obstacle, have they asked for swarming in the first place, maybe they asked and they did not receive, or maybe they are shy or whatever it is.

So they need to do that. I would certainly set some kind of aging target. Like for example, if you're in complex support, if anything that is over two weeks, that's probably too long.

Let's go figure out what it is. It doesn't mean we close all the cases that are over two weeks, but it means we need to be able to understand what's going on in them. And of course, if you have a system for reporting that upward, then very quickly, people are going to say, I don't want to report on 13 different cases.

So I will really work and minimize my backlog. So it is the one downfall. I think, of the swarming system.

I love swarming. I would never be in an organization that doesn't swarm, but it is certainly something that managers need to attend to.

## **Martin Schneider**

Interesting. So, Marilyn, I know you're kind of midstream in terms of putting your swarming initiative together. Has there been any effect positive or negative on backlog that way?

## **Marilyn Lynn**

So the way that I look at this is that, regardless of having swarming in place or not, because we had moved into the product aligned model as well, each product support leader is responsible for their team's back overall backlog.

And so is something that they're already managing and maintaining as well. Layering on swarming, earlier I talked about the team metrics. The one that we have in place related to the backlog would be the same day next day resolution for us.

And since we're like in the middle, still of the full global rollout, it's something that we're tracking and we've set goals on where we want to see that metric and how we want to move the needle with that metric as well.

But I would say that, again, regardless of having a swarming model in place or not, for us, our leaders of each of the product support teams are responsible for keeping a close eye on their team's backlog and the case ageing.

## **Martin Schneider**

Gotcha. Gotcha. That makes sense. And one of the things that we always love when it comes to backlog is our ability, and I'm sure you guys are using it with SupportLogic is the ability to search backlog in ways that you can't with your relational databases and your systems of record.

And being able to look at, when was the last inbound, outbound, and go by sentiment and things like that. To really, we call it putting the magnetic glove over the haystack to pull out the needles.

And always good to have backlog management tools in addition to the types of things that we're talking about here. Now we have a lot of questions, but first thank you guys, FT, thank you for the tips.

Marilyn, thank you for the commentary on your swarming initiative has taken shape. It's awesome. Looks like it's moving absolutely in the right direction, completely well integrated with the KCS concept and what you guys are doing with, with KIT, really really cool stuff.

I appreciate all the insight, but we got a lot of questions. So I'm going to run through these and just get to some of the more pressing ones.

So this question for, for FT and Marilyn, does the swarming model change how we present/ share relevant content with customers and how we capture knowledge? Yeah. I think you went through that a little bit, but I think maybe bringing it up a bit, how it was different before and then how it might be changing.

Now that you're doing a swarming initiative.

## **Francoise**

Should I go first and...

## **Marilyn Lynn**

Yeah, go ahead.

## **Martin Schneider**

Yeah, go ahead.

## **Francoise**

So from my perspective, the most important difference, is that swarming gives you a structure for when to capture knowledge, which is, if you have a swarming session, if you have a swarming request, probably you need to do something about knowledge.

Again, either because you could not find knowledge that was there, why? Or because the knowledge didn't exist. So I think it gives you that very clear point of, you had a swarming session, you need to document.

I would say that's the main difference. Marilyn, you might have more thoughts.

## **Marilyn Lynn**

Yeah, exactly. With intelligent case swarming, leveraging the KIT principle, that's the starting point. It starts with knowledge and the way we approached it was we needed to make sure that we had a strong knowledge management program in place, and that everyone on the team was focused on knowledge first as a starting point, before we layered on swarming.

And the way that we've approached this is that, when a swarm is initiated, if there is no knowledge based article that exists, the idea is that we need to start one and create it in draft, so that it's not an afterthought.

Get back to it when you have time. Because we all know what happens, right? You, you move on to the next thing and you tend to not go back to document and then that becomes a missed opportunity to capture a lot of the learnings through that swarm, that you can then leverage in your knowledge base for customers to self- serve to help your new hires on the team or team members who may have not been exposed to that particular issue previously, to be able to find that information on their own, through the knowledge base.

So it is really important to start with that knowledge first piece, and with the swarming, you are getting input from various members on the team to improve the quality of the content that gets put out there as well.

## **Martin Schneider**

Gotcha. Another question, I think Marilyn I'd like you to kick it off because you're in the middle of this, was talking more about kind of routing in the tierless model. Are they, it says routed based on a team's competency, but it is interesting.

It says, does anyone answer every case or swarm what they don't know, but with your kind of connection between also kind of product kind of set up of teams as well as the swarming, how is the routing set up?

is it just kind of round Robin and then people can start to get collaborative, and like to hear how you kind of set up the routing of cases, given that kind of product and swarming initiatives that are going?

## **Marilyn Lynn**

Yeah. So how it starts off is when the case owner takes on a case, they go through it and they try to resolve it as best they can, look up any existing knowledge articles that might be there.

If they can't, with their best effort, resolve the case on their own, they initiate the swarm. For us it's through the Slack integration for each of the product support group teams.

They will have a swarming channel that the swarm that they initiate will appear in. So then their peers in their product support group team will see that alert and they can then raise their hand on, on that swarm Slack to say, yep, I'm going to come in and help swarm.

I'm going to be a swarm owner or I'm going to be one of the swarmers who's going to help contribute to that swarm as well. So it's very much meant to be the team is to self- manage this, in order to help set up the team's success.

It's not going in and I, and identifying here are the only individuals who can participate in a swarm or help with a swarming process. It's pretty much more team based.

## **Martin Schneider**

Gotcha. Gotcha. Makes sense. a lot of people are asking and there's multiple questions around the metrics.

And how you might score a swarming, and you've gone over a few of those, but if you want to dive in a bit, either FT or... Actually FT since Marilyn went through some of hers, why don't you talk about some of the metrics that you think are important to measure, to make sure that your swarming initiative will be successful.

## **Francoise**

So as we know, metrics can drive behavior. So it's very important to get them right. In my experience, there are two things that are really important. One is to be able to give credit to the people who are helping.

In other words, I think most people in Support, they want to help. I mean, that's why they choose that career. But if I'm only rewarded at the end of the day for the cases that I close and not the cases that I help with, then my tendency is going to be, to take care of myself first.

Right? So we need to find some way to reward people who are helping. If you have a productivity target, maybe you can count the help that is given as part of that.

The second thing that's pretty important is to measure quality. So sometimes we will see, what I call, low value helps. Right?

So I go in and I say," Hi Martin", and that's my help. And I'm like, well, no, maybe I made Martin feel good, but I did not really provide help.

So to me that's better caught in the case quality program that probably you have. To figure out that people are contributing real things rather than just being there for the sake of being there.

It's usually a personal behavior problem, but to me, one of the main things, is to figure out a way to recognize people who have provided help.

## **Martin Schneider**

Gotcha. Now, and Marilyn, you used the term collaboration effort, which was really kind of interesting. What are the inputs into that? how do you measure the collaboration?

cause you had employee effort and you had the customer effort, what goes into measuring a collaboration effort?

## **Marilyn Lynn**

Yeah. So when the team designed our swarming model, one of the things that they put in, similar to after a case is closed customers receive a CSAT survey, when a swarm is closed, a survey goes out to the group that participated in that swarm and they get to input their ratings on a number of these questions, and the collaboration effort scores for the individuals who are part of the swarm, to basically rate how the interaction on that swarm was.

And we then take that input in, on the back end to determine the participation and how, if there's any coaching and guidance needed, improvements that were needed in that area, to make it so that the teams do want to continue and participate and feel motivated to join in on a swarm.

## **Martin Schneider**

Gotcha. That's interesting. I'm going to try because in the interest of time so many questions, this is awesome, but I'm going to try to combine two questions or at least I'll read them out and we can kind of combine the answering I guess.

It says, one is how do you determine who is needed on a swarming session? And then the second is how do you qualify a stakeholder who needs to be invited into a temporary select channel, saying how do you determine kind of qualify kind of mushing that together, there's similar concepts, how do you build out the kind of the SME network?

I think is really what the question is about.

## **Francoise**

So if I can take a stab at it. That's one of the big problems, especially for newer folks, especially in large organizations.

So right before this webinar, we were having a discussion about large support organizations versus smaller support organizations. And one of the problem in a large support organization is, you don't know everybody, right?

And you probably will never know everybody. And also you said Martin, how do I find the right SME? The right SME could be somebody who is not a senior person.

They just happen to know that particular area that you need help with. So what I find most of my clients doing is they create specialty pods, so focused around the product.

And they really emphasize the idea that the requests are going to go into these specialty pods, just like the case, and the people in the specialty pods will then self select.

Yes, I'm going to take this one. It seems to be the best way to do things. Doesn't solve all the problems. But that's a good way, is ask a group as opposed to asking individuals, because we may not know who the right individual is, but it certainly is difficult.

## **Martin Schneider**

And Marilyn, how are, how are you guys?

## **Marilyn Lynn**

Yeah. And that's how we set it up so that when a swarm is initiated, it's not for the case owner to identify the people to reach out to, it's basically sending a signal out to the team to say, I need help on this case, who on the team has the knowledge or experience to help with this particular case.

So it becomes more that team effort, like we described versus having to identify the individuals to pull into a swarm it's sending that alert or call for help out to the team, and the experts who have the background and knowledge and experience will then, basically leveraging the Slack integration, will indicate that they're there to help with that swarm.

## **Martin Schneider**

Gotcha. Gotcha. And, and just to level set, I know we've kind of hinted around some of this. But some of the questions were really around the tooling. Like what does MuleSoft use specifically to manage a swarm kind of from start to finish.

We talked a bit about the knowledge base and things like that are utilized as part of the policy, but when it actually comes to kind of facilitating this, is it the CRM system plus Slack?

Is it anything else? Can you just try of walk through what's the kind of base tool set that you guys are using to facilitate swarming?

## **Marilyn Lynn**

Yes, for us, it's using our case management system, as kind of the in intake of the cases and as a scribe when we need to initiate a swarm, we have the Slack integration built.

So we're leveraging Slack as a way to initiate the swarm for the swarming individuals to just raise their hand and say, yep, I'm here to help with that particular swarm request and then collaborating through the Slack channel as needed, if they need to take it offline and get on a call, that's something that the team can do as well.

And then of course the knowledge base, which for us is part of the Salesforce system that we already use for handling cases.

## **Martin Schneider**

Excellent. Excellent. one of the things that we see is people trying to get started quickly. And the Slack integration is really everything with, with our integration with Slack, people being able to reach out specifically managers, especially, someone had asked about kind of backlog swarming and we see a lot of managers doing that, going into their backlog and then saying, oh, I can use Slack to almost like swarm and say, hey, this one could be good for you.

There's a lot of different ways to leverage that Slack integration. It really has become a super great tool both through the swarming, but just in general, the ability to keep remote teams in this post pandemic world together.

And there were a lot of questions in the queue about, kind of related to the swarming, but how do you keep SMEs interested? How do you keep the team morale high?

how has it been putting something like this out during a situation where you're having more and more remote work scenarios than before?

Curious, Marilyn for you, did the amount of kind of, or the percentage of remote agents change over time? Have you guys always been kind of mostly remote?

And how did some of these how did putting some of these initiatives how was that affected by, by what was going on in the world over the last couple years?

## **Marilyn Lynn**

So at the time I joined the MuleSoft support team, it was already in the midst of the pandemic. So we've already, at least my interaction with the team and group had already been in the remote setting.

So in this case, I don't really know any different in terms of all the initiatives that we've rolled out in the 18 months that I've been part of the team has been to a remote group.

But for us, it's no different because we've been working in a global team environment. And so in essence, you're always working and interacting with people who are remote from you.

So for us it's really making sure that we identify individuals on the team to participate, to have them included in the process, versus going into a back room, designing it, and then rolling it out to the global team.

It's getting team members involved from, for us, it's like the global team involvement and representation as well.

And I think it's just the effort of having to make sure that there's more touchpoints, because you can't just turn around and tap someone on their shoulders.

And again, leveraging these tools to help us bring team members together as needed for a swarm, because we don't have the luxury of being able to just huddle in a conference room together in kind of the virtual setting, remote setting that we have now.

## **Martin Schneider**

Gotcha. Gotcha. That makes, that makes perfect sense. We have so many questions, but so little time. If we haven't gotten to your questions, members of the panel, one of us, or more of us will reach out.

We'll have your emails from your registration. So fret not, your question will be answered in due time. I'm going to turn it back to Vanessa, but I just wanted to personally thank all of your great insights FT and Marilyn, really awesome stuff, Vanessa, back to you.

## **Vanessa Lucero**

Great, thanks so much, Martin. And since we have come to the conclusion of today's live webinar, just a few quick reminders before we sign off for today, there will be an exit survey at the end of today's live webinar.

Take a few minutes to provide your feedback on the content and your experience by filling out that brief survey and a link to the recorded version of today's webinar will be sent out within the next 24 hours.

I now like to take this time to thank all of our speakers, John, Marilyn, Martin, and Francoise 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 live webinar, improving the support experience 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.