22.10 WW DWEB - Reduce Agent and Case Review Time

## **Martin Schneider**

All right. Hello everyone. We'll get started in just a few moments, just waiting on one more presenter.

Hope you're all having a great day, morning, afternoon, evening, wherever you are in the world.

All right.

See a few more people popping on, and we'll begin in just a moment.

We might be having some technical difficulties for one of our presenters, so I'll just wait another five seconds to see if he's going to meet us on stage.

And there he is. Excellent. All right, we are all here. Welcome everyone to the SupportLogic webinar, Reduce Agent and Case Review Time by 60 to 90%.

Yes, you heard that correctly, 60 to 90%. I'm Martin Schneider with SupportLogic. I'm joined by Greg Walker and Ryan Radcliff also of SupportLogic.

They'll introduce themselves in a bit more detail later, but let's get moving. We do want to make sure that we cover everything. We got a lot to talk about today.

What are we going to talk about? We're going to talk about the importance of aging engagement, especially today and in today's labor environment and economic environment. We're going to talk about the problems of legacy, quality monitoring, and how AI can help.

We're going to show you a product demo that shows just how you can streamline your case review, your agent evaluations, and really just streamline and up level your coaching in a really simple and cool way.

And then we'll take your questions. So let's jump into it. Agent retention is a big issue. We work unfortunately in an industry with higher than average attrition rates as it is.

And in our inflationary economy and in the great resignation and everything that's been going on, it's harder than ever to retain your agents. And what's more, when you're replacing agents, stats are showing that salaries are the highest they've ever been.

The competition for great workers is the best that's ever been. And it's really just, you're paying more regardless. It could be a brand new employee that leaves, it could be someone who's been there for years.

The next person that comes on is absolutely going to be more expensive. We want to reduce that for you, and you want to reduce that for yourselves as much as ever. But it's hard because reviewing cases and making sure you're engaging at the right time and keeping agents excited and enthused and just not burn out is really hard.

They're constantly firefighting if you don't have the right tools in place and it causes a lot of stress. It's hard for support to get support. And it's hard to see how they're progressing and where are those gaps in their progression.

And a lot of times we're doing case reviews because the easiest things to find are maybe escalated cases or issues where the customer's upset. We're not finding the right areas to give positive reinforcement.

It's hard to do that. And again, it becomes inconsistent in coaching practices. It's often done in silos, it's often done off on spreadsheets, and it's just hard to get that together.

And really make it a mechanized streamlined tool so that everybody wins. I do want to take a quick poll because we're going to be talking a lot about case evaluations, agent coaching and reviews.

I want to open the first poll talking about your current case evaluation process. You can go over to the polls tab and start answering the poll, it's open now.

You're going to take about 30 seconds. It's," We do not have a process in place. Are your managers reviewing one to two cases per agent per week. Or you're doing three or more cases per week?" Surely like to see how engaged the managers are in your organizations on how they're doing their case reviews and agent evaluations.

Starting to see these come in. I say we'll take about 20 more seconds. It looks like, how we're coming, not too surprising, but maybe a little bit surprising in that the majority is we're only seeing one to two case reviews per agent per week, becoming the majority here.

But it's starting to even out a bit. Surprising to see that several of you don't have a structured process in place. Now that may be because you're a startup or a young support organization.

If you actually take our maturity model assessment, which you can find on our website, you can actually learn a bit about that. And we're happy to walk you through some best practices to getting a great evaluation process in place and setting up rubrics and things like that.

So we're going to close the poll in about two seconds, get your last vote in and let's close that poll.

And interesting, not a huge margin, but about one to two reviews per agent per week by the managers is what won the poll. So it's interesting. So at least I'm seeing that a majority of you have something in place, that's good to know.

Good, let's move on. We all know that if you've got great agents, you're going to increase your CSAT. And you're going to lower costs because the well- coached agents, they shorten your meantime to resolution, they improve the relationship.

They stick around longer if they're feeling valued and they're performing well. All of this just leads to, it's the benevolent cycle. It all leads to better support operations and lower cost and a better customer experience.

But the issue is really, it's getting them there. And that comes to onboarding, that comes to a lot of different things that make it really, really difficult to do this in a consistent basis for a majority of your agents.

Not everybody's going to be a superstar, but if you can help the good agents become great agents and the great agents become standout heroes and superstars. And do that in a streamlined way, the results can be phenomenal.

And you need to do it in a way that isn't super time consuming for the managers. So let's keep talking, because how do you do that? How do you make these superstars.

Because the managers, they don't have a ton of time, like I said. They can't enforce a review cadence if they don't have something there.

If you're only focusing on negative interactions, you're not making anyone happy. So there's a lot of issues. I won't go through all these, but you can get what's happening. Everybody has a lot on their plate, managers especially.

But how do you get them to engage at the right time and in the right way without it becoming too intrusive on their work? So I want to open up another poll and talk about the time that you're spending or your managers are spending on evaluations.

So if you go to the polls tab, you'll see our second poll is now open. Are you spending one to three hours per week? Are you spending three to six hours per week? Are you spending six or more hours per week?

Now that could be the total time that you're spending in reviews and evaluations and coaching. Just trying to get a ballpark figure of how much time people are spending.

All right, coming in, we'll take about 20 more seconds. And we are looking at... Kind of surprising, I'm seeing a few for six or more hours, which is a lot.

But I'm also seeing a lot for one to three hours. Seems to be winning a bit, not by a huge margin. Quite a few for three to six hours per week.

We'll close the poll in about two more seconds if you want to get your vote in there. All right, now closing that poll up, kind of surprising that it, we got a lot one to three hours a week.

Think about that. That's almost a third of a day spent on something like case reviews. But what if you could do that a lot more quickly?

What if you could not have to go hunting into cases? If as a manager, what if you had these things just handed to you in a silver platter? Well, that's the beauty of some of the tools that we're creating.

We're going to talk about those in just a second. So I'm going to turn it over to Greg. And Greg, why don't you tell us a bit more about how we can make this process so much easier to create these superstar agents on a more consistent and less time consuming basis?

## **Greg Walker**

Absolutely. Thank you Martin for handing that off. Hi, I didn't do a full introduction. Hi, I'm Greg Walker. I'm here on the product team at SupportLogic. And what's most interesting about me and my background, I used to work in support.

I've worked in support for 15 plus years. I used to work cases, I've built global teams, I've led support organizations. I've driven digital transformation. And in all that experience, one of the most important people, most important thing about support is the people.

And we talked about that at the beginning. That's what really can drive CSAT. And doing all those case reviews and doing them right and doing all the things you need to do as a manager on top of doing case reviews, which all the backlog management and all of that.

And then trying to do the people side of it, which is so important and so rewarding to be able to grow people and coach them and provide all of that. That falls by the wayside.

It becomes the thing that you only spend one to three hours with per week because you don't have, your times taken up with other things and even the coaching beyond that.

So we have a lot of tools and we'll go through that and how we can help make that quicker, more meaningful and more impactful in engaging with your agents around it. But before we move on to the next slide, let's do a quick poll here and talk about how many of you are using machine learning to help find cases to review.

So that poll should be open now and you can go ahead and vote on that and we'll just take a minute to see what the results are.

Very interesting. So there's a number of you that I've started down the road of using machine learning on this and some that have a lot of plans to, which is great.

Great, we'll give that another few more seconds here to let people get their final votes in. All right, looks like we've slowed down so we can go ahead and close up that poll.

So great, it looks like about half of the people are using some sort of machine learning and the rest are no. But you're looking at different options, which is great.

So we can talk a little bit more about that. So let's move forward here to our next slide and talk about what SupportLogic brings here. A support manager can't be everywhere, you couldn't review every other case.

When we talk about COVID and people moving in at home, you can't be listening to all of the... It's not like walking a support floor where you can hear people talking and you hear the vibe of going on.

And so what SupportLogic really brings is AI insights to help some of these heavy lifting. Being able to find those cases to review through our recommendation engine.

You can leverage our signals that we have in order to be able to bring those up. And then take all of those things and score the case against the standardized rubric that you can build for your company that's customized to you.

And then lastly, we have in support organizations, sometimes the support doesn't follow, especially in a matrix organization, may not follow the hierarchy that's built out in the CRM system.

And our virtual teams in everything give you flexibility to group agents in ways that make sense to how your support delivers support.

So let's talk a little bit about where our process starts. And we start with being able to coach engineers in real time. So this is a screenshot of our SupportLogic interface and all of your case comments and everything are in there.

You can highlight specific passages, go ahead and add individual engineers and coach them in real time. This is even before we get into doing a review.

So maybe a case got brought to your attention based on our AI signals that we produce or the old fashioned way of a CSAT survey that came in or somebody tapping you on the shoulder.

And you can go ahead and provide that feedback to stop that case from becoming an escalation. And even in this place while you're reviewing it, you can put a mark on that case to market for review.

And we'll show how that shows up in the dashboard later on so that you can then pick that back up and then follow up with that engineer and provide that coaching and that feedback on different ways to approach it.

And really important is all that guidance is private only to the manager and the engineer that you're coaching. So it's not shared with a wider group unless you add the people into it.

And so then our system also uses AI to help highlight the cases that you should be reviewing. And we do that through our recommendation list that you can see there on the left hand side.

And that suggests cases based on the signals that we see, based on other interesting moments in the case and puts those into an ordered list.

We have a large customer that is for coaching and they all their managers rely on that to suggest the cases that they should pick. Once you pick a case to review, it goes into your next spot in the Kanban board, which then goes to the in progress.

And if you notice down there right below that in progress case, there's the one that you marked for review. So that would also show up to remind you to go back in, that you'd mark that one that you wanted to do a formal sort of review on it.

And finally the ones that you completed. And the ones that completed is actually really powerful for being able to go in while you're having that one- on- one with a support engineer. And be able to pull up that review and then walk through it with them so it gives quick access.

You can see what you scored, so which ones are the most impactful to pick up and go through. So the next step on that is that you've picked up that case that you marked for review and that you get into our agent coaching and evaluation.

And so what this brings up is everything a support manager needs to review a case in one screen. You can see all of the case comments over on the side, all the coaching comments, any signals that SupportLogic had picked up in the case.

You can quickly highlight sections, put in a comment on review it. At the same time you can come over to the right side and score this based on the custom rubric for your company and put other comments in.

Once you've gone through and done all that scoring, put all that into place, you can then complete the review and turn this either into, it's stored in our system. You can pull it up and review it or you can even download it as a PDF to use in your coaching conversations and to have those meaningful conversations.

One of our other large customers, when they started using it, they found that after they did this with the structured rubric, it really brought out those meaningful valuable conversations.

Those coaching conversations where they could really talk about not the negative of," Oh you didn't do this, you didn't complete this." But where the engineer could grow and improve.

And that is the key to really making engineers who want to excel and do more to give them that sense of growth. And being able to give them that structured feedback and coaching.

And lastly, visibility. So the other thing that you want to be able to do is look at an agent over time and be able to say," How are you performing? Or how is the work that we're doing together improving or in some cases maybe not working and you need to change what you're doing." So we provide that by through our agent insights and our reporting dashboards and you can quickly see and easily see where an engineer has gaps compared to an individual, compared to a team.

And in addition, at a higher level, you can look to see where maybe your whole organization has a gap, maybe you need some additional soft skills training or technical training, you can highlight that.

And then you can even use this with your leadership to justify your cost that you're going to spend to do that and then track the results you get on the other side. So it gives you a lot of power to be able to manage and coach an agent from the very beginning before the case even gets into a review with coaching comments.

All the way through to the reporting and in your one on one conversations. So with that I want to hand off to Ryan here who's going to walk you through a demo so you can see this in action and expand beyond what I've done.

## **Ryan Radcliff**

Thanks Greg. Can you hear me okay? All right, great. I'm going to share my screen now and get into the demo.

Okay. Can you see my screen? Is that a yes? Yes, all good. Okay, awesome. So what's great about this, this workflow is really the new game for agent coaching and development.

And I think the benefits are really clear, when you look at organizations that improve CSAT. Two of those top factors are staff training and proactive monitoring. So they're ramping folks up faster and making those adjustments that you need to keep that team elite and right now there's really no way to do this.

Agents take a long time to ramp up in a lot of organizations and then turnover is high. So there's these booked elements that where you're really losing a lot of value with your team.

So let's get into this demo. We've found that there's some real challenges in trying to coach and evaluate. Ticketing systems aren't going to help you find the best cases.

No real central way to track performance. There's measure a case review against a rubric, building your own rubric, defining what your team considers great customer support.

And there's no way to review the most relevant cases and you lose time because a lot of times you're reacting to these things after you've gotten a poor CSAT or a poor MTTR reading.

And there's no repository for past reviewed cases in those sites. So really things are in data silos, they're in spreadsheets and that's really why we built this tool. And so I'm going to walk you through it.

It all starts with this kanban view where you can see here we're really putting AI and machine learning to work in a workflow for you. The ML and the AI is more about the background.

It's bringing the cases that matter the most right up here, showing you great opportunities to coach from. You can see this list here of cases that have negative customer sentiment identified with a large conversation count.

Mobile signals are happening in these cases and you can really jump to any of these and start to coach and find out what's going on. And you can mark this for future review where they pop up middle to row.

Or track the progress on the cases that are already in the middle of or pop down here to cases that you're still working on. So if I go to this case, just to show you this next stage in the workflow.

Right now we're in the case and we're able to go through and look what's going on and we can add comments as we go. And this is something that's available throughout the whole platform.

You can always coach. So we can get in here and we can make a comment on something we see and hit coach.

We can add that comment in. And then review the full evaluation of the case when it's resolved and it pops up in our queue. We get into this panel, which is really where the review happens.

It's this three thing. And what's great about this, when you first get into it, it saves you time right away because it pops you to the very first piece of conversation in this case. It brings you to the bottom, the start of the case, which is really where the review begins.

And then you're able to come up through and see your past comments and you can add more comments as well.

And you can select what category in your rubric this falls under. And this I'm calling out something that happened great with the communication that the agent did. So I add that there.

Now what's cool about this is as you go through the case on the right panel, you've got this rubric. You've got our rubric or a custom rubric, whichever you prefer. And you're able to go through here and grade them as you go.

And then you can see here your past comments show up under each one of these sections. So when I click this comment, I can see here what I wrote. And I can click on it here and it takes me right to it.

If I was further down and I clicked on that, it would zoom me right to that comment. So you can go through pretty quickly and all the different parts of how you your customer support to be run.

Communication, internal processes and judge an agent across every one of these for this case. Keeping in mind that you're starting from a high value case.

So as you go through, you can see I've pre a lot of this for speed for the demo. And we get to this next section here and you can see that we've got a full summary of what's going on with this case.

All elaboration back and forth, all of the great we've done when we hit view, we've now got a summary. We can download that PDF and we can have conversation with that agent, but it's also going to show up in completed reviews, in an area where we can go back and review those.

So the next thing I really want to show with this since we've gone through these panels and how our recently reviewed cases are showing up here on the right. Cases that we have marked to review and cases that we're currently reviewing are in the middle here.

And then AI recommended cases are showing up over here on the left. But we can get into looking at what our agents are actually doing.

So as I pull up this agent, Kyle, we can see here when we go to the performance tab and let's back it out a little bit to show a little bit more time. You can see that across these different core customer service pillars, we're tracking how they're doing across the cases that we're viewing.

So across each one of these we're getting in the tool, a progress of their development, the more and more that we use. So if you do one a week and then you add all that up into a quarter.

Over that quarter, you're going to see in each area that either we define with our work or you define it with a customer rubric, getting to see that development.

So that concludes the demo at this point. I'm going to stop sharing and throw it back to the team. Thank you.

## **Martin Schneider**

Right, that was awesome Ryan. Just shows just how streamlined it is when like you said, we kind of silver platter those applications to you.

That with which cases, what's going on, into putting you your eyes for the manager, right to where they need to be. Really, really, really cool.

So we've seen the tool in action, we've talked about why this is important. Get some key takeaways before we take some of your questions.

Again, we know that empowered agents, they lower your operations cost but they improve your CSAT. When they're working harder, when they're working smarter and they're absolutely engaging in a more effective way.

The customer gets it, the customer understands that, gets a better support experience. That just improves all your metrics. But it's not easy to get there.

The legacy agent and review tools, they're really time consuming. If you're doing it in a manual way, you're taking anywhere, like you said, some people are taking one to three hours per agent that the manager's doing. It could be hours a week.

And I saw a couple people on that poll telling us it was over six hours a week. You can't be effective if you're only reading a small single digit percentage of the cases.

You got to understand the holistic view of the agent's performance just to figure out where it's at. And AI can help with that. AI machine learning automatically reads these cases, surfaces up the interesting moments, the teachable moments.

Either against the rubric or just around anything to do that real time continuous coaching that Ryan showed and that Greg talked about. That's really cool because the closer you are to the event that we're referencing, the more that the agent probably knows what you're talking about when you're providing coaching.

Because if it's a week later or two weeks later," I do 10 cases, I don't know what you're talking about. How can I learn from that?" But if it's right there a few minutes later they say," Oh yeah, I should have done it that way." They'll probably be more likely to remember next time to do the better way.

Really cool stuff. So when you streamline coaching, when you improve quality monitoring to improve this much more intelligent, streamlined, holistic view, you increase engagement.

Like I said, you improve that context, the agent payback timeline, you see that performance that we are seeing. That's likely to be going up and not as jagged and all over the place.

And the thing is we want to improve agent tenures. In this economy, in this competitive labor market, you want to keep agents as long as you can. You want to onboard them faster and this tool can help with that because we can start getting them in and coaching them in real time.

So they can actually start taking cases earlier in the process. And when they're engaged and they feel trusted and empowered and coached well, they're going to stick around longer because they feel valued.

So those are some of the key takeaways. This is a really, really cool tool as Greg was pointing out, we have really large customers with thousands of agents and hundreds of managers using this tool.

And seeing it just streamline their case view process by at least 60%. So that's really cool. Taking 60% of that manual process time out of the equation and just getting to the important stuff, the engagement, the coaching, and really improving the agents.

That's what's great. It allows managers to spend more time doing more strategic things and not stuck in tactical, arduous things, which is really, really cool.

So with that, let's take some questions. So the first question, and these are probably coming through, we didn't answer these in time, so some might have become obvious as we explain things, but repetition is always important." How does SupportLogic get the case information to recommend reviews?" I'll start with that.

If any of you want to comment as well, it's really quite simple. We integrate with the case management system. That could be your Service Cloud, ServiceNow, Zendesk, Freshdesk, something like that.

And we just literally ingest that when you start working with us, every case and we continue to ingest every case. So it's coming in and we're just reading that and running that through our AI ML engine and using NLP and other technologies to pull out what we call signals.

We call them customer signals, but the idea is those signals can be against sentiment, they can be against a lot of other things. We also help predict cases that are going to escalate for example.

So we learn all these different things and we're constantly reading the unstructured data. And this is with the big difference. This is where we come in and we can read that unstructured data, the case notes, the attached emails, the transcripts.

Things like that where traditional CRM and case management systems don't do a good job of analyzing that data. That's where we come in, where that force multiplier layer of intelligence on top of the system.

Really focusing in on the unstructured data. You guys want to add anything to that?

## **Greg Walker**

No, I think you nailed that answer for just our ability to read and look at it and that's how we can bring that power of seeing all the case comments there. And being able to put the coaching comments and review comments right in line, which is a real big time saver.

## **Martin Schneider**

Yep. So here's an interesting question coming in Greg. This one might be for you. Can the reviewed list, I guess they mean on the finished reviewed, the right side on that kanban.

Can that be filtered by an engineer or will they see all of them?

## **Greg Walker**

You can filter, you can filter it by an engineer, you can filter it by a group of engineers. We have large customers that use it that way because obviously your support teams are big, you're going to have that. And that also comes to our ability to create virtual teams in our application.

So you can actually create a team that is not structured on your CRM hierarchy. And a lot of times in a matrix organization you might have a manager's over here, but they have a dotted line to somebody.

You could build that into a virtual team. So it's actually very flexible.

## **Martin Schneider**

That's really good. You could do that out by product and analyze how people are performing. Again, certain product lines, even if that's not how your support is structured. Really, really cool.

So here's a good question." Is agent evaluation standard with SupportLogic or is it a license feature?" If we just see insights in virtual teams, can you get it all, I guess, and that's a good question.

If you're using us today, you probably have access to it and if you start using us in the future, you will definitely have access to it. It's not something that we really limit. We believe in driving adoption and getting value for the application and this is a huge value driver as people see the benefit of having these insights and recommended cases served up to them really easy.

## **Greg Walker**

And I'd say just have a conversation if you're a current customer with your CSM about it and we'll get engaged and see how we can get you set up to give it a try.

## **Martin Schneider**

Yep.

Here's an interesting one and this one Greg, we can think through this one. I like that because I like those one's, almost a feature recommendation." If the review evaluation is done on closed cases, can it integrate at all with the post case survey process?"

## **Greg Walker**

So integration with a CSAT survey is what you're trying to integrate it with. Obviously we've, you complete the survey, we can talk about how we integrate SupportLogic and whether, you pull some CSAT data in.

We could have that conversation. Today it's natively not integrated with CSAT, but I'd love to learn more about the use case for that.

## **Martin Schneider**

Yeah, I think that's interesting. I think maybe on the next, it's easy to find us on LinkedIn or wherever and we can continue that conversation. Because there's a number of different ways where you could actually, we rely a lot on, like I said, that ingestion of the data.

But we also ingest the metadata and other things from the CRM. So you could theoretically triangulate the data against CSAT and review by pulling stuff from the CRM. So there's a number of different ways to skin that cat.

So it'd be interesting to it to almost brainstorm a bit with the use case there. I thought it was really cool." Is there a good default rubric to get up and going?" Is another question.

Greg, we've got at least one in there, I know.

## **Greg Walker**

Yes. Mean we have our best practice rubric. So we do have one that we recommend to customers when they come on, but a lot of times customers will take it and customize it to their existing one.

They may already have an existing rubric that they are already using and they just want to expand and use that for theirs. And there's other cases where they may need to, want to use ours or adopt our best practices.

So it just depends on the customer and what they're trying to do.

## **Martin Schneider**

So we had another question similar, this one's kind of similar to what we just said.

It says we don't have a case evaluation rubric yet." Can we use the system to teach us about the type of rubric we need to create?"

## **Greg Walker**

Absolutely, you could look at the data, like I said, we'd recommend, we have a recommended one that we'd start you with. And then you can use it and then the rubric, you can modify it at any time and release the next one that you want to put out there.

So we allow you to change it over time and to make modification. So the best thing to do is start with sort the one that we'd recommend, see how it works for your business, and then adjust it as necessary.

## **Martin Schneider**

Great, excellent. It looks like the questions that we have, we got a lot of similarly view questions that we've already talked about the topic.

So I think we are going to close. The only last one, which I think is a little more tongue in cheek is," Will this feature integrate with the Tesla Bot so we can do all our reviews for us?" Maybe someday.

## **Greg Walker**

Yes, it'll do the coaching too.

## **Martin Schneider**

Yeah, exactly. At the end of the day, that's the beauty of what we do. We do all the automation for you so that the managers can focus on that human element. The things you don't want a robot doing.

Creating that human engagement with and the bonding with your agents, with the managers and the agents. And it really elevates the relationship and it's really, really cool.

We're really excited about what our evaluation tools bring to the table. I'm sure you've probably been to our website most of you, but we've got some more information on that. We've got other data sheets.

We'll be sending some interesting howtos and other things to use the system to everyone who's registered for this webinar.

And we thank you for taking the time. If you're a SupportLogic customer and you're not using these tools today, you almost certainly have access to them. So let's get you started. Talk to your account executives and your customer support managers or customer success managers, excuse me.

And if you're not using SupportLogic at all today, let's continue the conversation because this is something that no matter how much time you said. Whether it's three hours, six hours or more, we're going to reduce that time for you.

And have your manager spending time on more strategic and impactful things. And really just give them that time back and that productivity. So with that, Ryan, thank you for that awesome demo.

Greg, thanks for all that great insight and everyone thank you for joining us. We'll see you next time.