

SOP

Customer Support Process

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# Revision History

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| **Revision** | **Description** | **Author** | **Authored Date** | **Approver** | **Approved Date** | **Released By** | **Release Date** |
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# References

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# Overview

The purpose of this document is to outline the Technical Support process for team members in handling

* Support Business Hours, Holidays, Weekend Support
* Technical support contact & Call Submission process
* Customers, Incidents, Problems, Change requests, Escalation
* Management Escalations – Customer, Internal
* Incidents – Case Lifecycle definitions, Re-assign, Escalation – Development/IT Support/Product, Case Closure, Case Re-work

# Assumptions

The assumptions in this process are that Technical Support employees have access to and are trained in using the Service Desk application.

# Change Management

Any change to this document requires approval by the executive team.

# Quality Controls

This document will be reviewed annually, and adjusted as needed. Any required changes to the process are documented as versioning of the document.

# Definitions

# Types of requests

* + Inquiry - A question about the service, billing, etc.
  + Incident - An unplanned interruption or reduction in quality of service, either discovered internally by Customer or reported by a customer.
  + Service Request - A request for services.

# Severity Levels - refers to the immediate impact to a customer for a given issue or request

* Response time - refers to the maximum amount of time that will elapse before Customer Support responds to the request.

# Resolution Time - refers to the maximum amount of time that will elapse before Customer Support resolves the request.

# Published Holiday Observations - Observed Holidays are considered “Full Day”

# Full Day - Refers to the timeframe 00:00-24:00 hours of a single day.

# Published Holiday Schedule - A published holiday schedule for our offices and support operations can be found on our <http://www.xxxcom.com>

# Triage - Ticket triage is the process of classifying and assigning customer support requests (tickets) to either customer service representatives or self-service software based on their issue type, department, urgency, importance, and complexity.

# Service Management

# Service Contact & Coverage

* Salient Features:
  + 24/7, 365 days a year for all customers
  + Service Desk portal to self-manage issue tracking, questions, issues, problems and change requests and call metrics
* Submission Process:

Portal:http://sutext.com

Email: il@customer.com

Phone: United States 1-800-860-2040, option 2

APAC +61 (2) 80742932

EMEA +44 (20) 37955127

# Service Availability

|  |  |  |  |
| --- | --- | --- | --- |
| Shift | Time | Coverage | Location |
| Morning | 06.30am to 3.30pm IST | APAC | India |
| Afternoon | 1.30pm to 10.30pm IST | EMEA | India |
| Night/US Day | 09.00am to 6.00pm EST | Americas | USA |

***Full Support*** - Monday – Friday business hours (8am to 5pm local time) by phone and web portal except for holidays as defined below as *Limited Support*.

***Evening and Weekend Support*** - Limited **support** for production related critical issues only, by phone and or web portal

* ***Limited Support - Monitoring*** *and responding to critical items only.  Limited Support applies to the xxxx specified India holidays*
  + Non critical issues would be addressed based on discussion with customer

# Service Priority

|  |  |
| --- | --- |
| **CRITICAL** | Critical tickets may prevent a customer from working or cause other devastating consequetickets are often worked first or passed to a senior team member. |
| **HIGH** | High priority tickets may affect multiple staff members, customers, or departments. |
| **MEDIUM** | Medium priority tickets may affect a limited number of departments or customers. Customers may be able to continue work by applying a workaround. |
| **NORMAL** | Normal priority tickets affect only one or two customers and may present an inconvenience, but do not impede work. |

## Service Response & Resolution times

|  |  |  |
| --- | --- | --- |
| **Priority** | **Time to first response\*** | **Time to resolution\*** |
| Sev 1 (Critical) | 15 Mins | 4 hours |
| Sev 2 (Urgent) | 1 Hour | 24 hours |
| Sev 3 (Service Request) | 4 Hours | 72 hours |
| Sev 4 (Inquiry) | 8 Hours | 5 Business Days |

\*\*The times listed above start when an incident, service request or inquiry ticket is created.

## 

# Triaging

End User

Named User

CloudHesive

Support

* A customer can designate up to two (2) resources as “named users” that have authority to contact Customer Support directly to report issues.
  + Requests from non-designated resources will be deferred to the named users until the request is approved by one of them.
* Approval by a named user is applied to the life of the request, thereby granting permission for the non-designated resource to work with the Customer Support team for the duration of that specific request.
* Named users are expected to triage requests from end users of their service, classify severity and then raise a ticket with Customer Support, as necessary

## Responsibilities

* *[Customer] responsibilities:*
* *[Customer] should provide all necessary information and assistance related to service performance that allows the [Service Provider] to meet the performance standards as outlined in this document.*
* *[Customer] shall inform [Service Provider] regarding changing business requirements that may necessitate a review, modification, or amendment of the SLA.*
* *Customer is responsible, Infrastructure - Hardware, Network, Operating Systems, Databases, Internet gateway etc.*
* *[Service Provider] responsibilities*
* *[Service Provider] will act as primary support provider of the services herein identified except when third-party vendors are employed who shall assume appropriate service support responsibilities accordingly.*
* *[Service Provider] will inform [Customer] regarding scheduled and unscheduled service outages due to maintenance, troubleshooting, disruptions or as otherwise necessary.*

## **Stakeholders**

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## **The helpdesk shall have the following stakeholders:**

## **Complainants:**

## **The complainants are the individuals contacting the helpdesk for any**

## **query/concern/complaint/grievance.**

## **They shall receive an email upon the registration of**

## **their incident with the helpdesk. A ticket number shall be sent along with the email to**

## **enable the complainant to track their respective complaint.**

## **b) L1 Support (Helpdesk Executives):**

## **This group of users shall log any query/concern/complaint/grievance received either through telephone or email within the helpdesk in order to generate a ticket.**

## **These users shall be able to perform the following functions on any tickets open at their level:**

## **Provide any comments/updates on the ticket**

## **ii. Upload any supporting document related to the ticket**

## **iii. Forward the ticket to L2 in case it is not resolvable at L1**

## **iv. Close the ticket**

## **c) L2 Support:**

## **This group of users shall be able to view any ticket marked to them either by L1 or automatically by the system and o perform the following functions on any tickets open at their level:**

## **Provide any comments/updates on the ticket**

## **ii. Upload any supporting document related to the ticket provided by the complainant**

## **iii. Close the ticket**

## **d) Helpdesk Operations Manager:**

## **This user shall have access to all open tickets and shall be able to perform the following functions on the tickets:**

## **Log a new ticket**

## **ii. Provide any comments/updates on a ticket**

## **iii. Upload any supporting document related to the ticket**

## **iv. Forward the ticket to L2 in case it is not resolvable at L1**

## **v. Close the ticket**

## **In addition to this, this user shall also have the rights to create, modify and delete users**

## **in the helpdesk system & update and maintain the knowledge management system of the**

## **helpdesk.**

## **e) Helpdesk Nodal Officer: This user shall be have access to all open tickets. In addition, the**

## **user shall be able to perform the following functions on the tickets assigned to him/her:**

## **i. Provide any comments/updates on a ticket**

## **ii. Upload any supporting document related to the ticket**

## **iii. Close the ticket**

* **Support Manager**
* Manages all aspects of management of the application software including maintenance and development and functional and technical team user support
* Manages the application change request and problem resolution process
* Works with team to develop application development plans including minor upgrades, patches and fixes, problem resolution, change requests and enhancements
* Develops training plans to ensure ongoing development of application team
* Works collaboratively with Org Change/Training Team to develop communication and training to support end user readiness
* **Application Support Engineer**
* Acknowledge issues from customer through support portal, telephone and triage with internal teams for resolution
* Talks to user to learn procedures followed and source of error
* Provides options for issue resolution and identifies business process improvement opportunities
* Provides functional application and business expertise to support end users
* Delivers training to end users in support of upgrades, enhancements
* Documents functional requirements to support application service requests

## Escalation Management

## When a customer notifies that the product or solution is not working, and contacts the customer support with the business impact and urgency of the issue

Best Practices

* Define SLs for your team
* For each SLA breach, set up corresponding escalation paths
* Do a thorough root cause analysis of the escalated issue
* Train your agents to be empathetic
* Keep your customers in the loop
* Empower your agents with the right tools to manage escalations
* Create positive customer experiences even when things go wrong

## Types of Escalation:

## Functional Escalation

## Functional escalation occurs when a customer’s request cannot be resolved by a support representative within their regular scope of responsibilities outside the purview of their expertise. E.g. (Server Down, network Down )

## Hierarchical Escalation

## customer’s request requires someone at a higher level – like a supervisor or manager – to intervene in order for their issue to be properly addressed.

## Automatic Escalations

## When an SLA violation occurs, the higher-ups in the team are automatically notified. Such escalations urge them to take charge and work on resolving the customer’s query at the earliest because otherwise, it can result in[customer dissatisfaction](https://hiverhq.com/blog/customer-dissatisfaction) or reputational damage.

## Incident Handling

## High Severity Issues - Severity 1 and 2 request

* + Assign an escalation lead to followed up via phone call to support.
    - After hours requests will then be forwarded to an on-call engineer for prompt response.
  + Severity 1 tickets are given the highest priority and processed per the Response and Resolution Times mentioned in SLA.
    - Updates will be provided every 30 minutes until the issue is resolved and will yield a Root Cause Analysis (RCA) provided to the customer
  + Severity 2 tickets are also considered high priority and processed per the Response and Resolution Times defined in SLA. Depending on the nature of the issue, an RCA may be requested.

## Medium and Minor issues – Severity 3 and Severity 4

* + Affects few users and a workaround is available, but still needs a resolution and this affects the normal work flow of the customer. Tha updates will be provided via the ticket logged in portal
  + Severity 4 tickets are considered the lowest priority and typically represent an inquiry on managed services and are completed within 5 business days of the initial request.

## Business Impact

* Lose customers and revenue
* Negative word-of-mouth marketing
* Lowered customer satisfaction and loyalty scores
* Escalation Matrix

An escalation matrix details exactly when a customer service representative should escalate an issue to a higher level or a more skilled colleague

* How to use:

### Understand the different types of escalation (and make your choice)

* + Understand the different types of escalation (and make your choice)
  + Define the points of contact (POCs) for each escalation stage
  + Outline resolution time limits and SLAs based on escalation levels
  + Treat the escalation matrix as a flexible guide, not the law

Sample Escalation Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Issue type** | **First contact** | **Escalation**  **Level 1** | **Escalation**  **Level 2** | **Escalation Level 3** |
| After 30 minutes | After 1 hour | After 3 hours |  |  |
| Customer complaint | support specialist | Senior support | Support team manager | Head of Support |
| System malfunction | support specialist | Senior engineer | Head of IT |  |
| Product issue | support specialist | Senior product engineer | Product team lead |  |
| Product functionality question | support specialist | Senior sales manager | Head of Sales |  |

## Standard Support Process

## A basic customer support process