

Solving Tech Support, CRM and Issue Tracking

Case Study: Fortune 100 Company

Adapt Data Solutions

Introduction

When the leading measurement device supplier to the oil and natural gas market needed to modernize their technical support call tracking system, they explored many possible solutions. The needs were clear:

- **A web-based solution...** Global call centers and field representatives need to access customer support data.
- **Hassle-free administration...** IT staff could not be burdened with maintaining and implementing a tech support system. With the existing package, IT staff had to perform backups and upgrades. Additionally, the support department was forced to spend significant time and dollars working with consultants to make minor changes to the system (like adding a new field).
- **Email Integration...** Using MS Outlook to correspond with clients is fine, but it doesn't scale into a global customer support organization. The tool had to allow multiple support staff to access the same customer email system.
- **Reporting...** The legacy system consisted of a few built-in reports which did not provide much information on what was really happening in their organization; where improvements were required and what issues were most critical to building customer loyalty. Adding new reports to the existing package was almost impossible.

The [Adapt Data Solutions](#) team was able to exceed all of these customer expectations using EnterpriseWizard. Within a few days, a prototype support tracking tool was developed and tested. The support team ran both systems in parallel for a week and had fully migrated the support team onto EnterpriseWizard **within three weeks**. This included testing, documentation, and support team training.

Since making this successful transition, the company further expanded the installation from a simple technical support system to encompass: online repairs, product downloads, eLearning and more.

Business Overview

The company is a diversified global manufacturing and technology company with more than 140,000 employees spread across approximately 265 locations and 60 divisions worldwide. Divisions within the company provide products to both business (energy, telecom, process controls) and consumer markets (tools, storage equipment).

Challenges of the CRM & Technical Support System

The company was faced with several customer relationship management (CRM) and technical support challenges which were preventing them from satisfying customers.

1. The existing SupportLogix system (from SalesLogix) **was too expensive to modify/maintain**, had proven to be **unreliable** and **lacked the features required** to properly manage a global support team.
2. As the company continued to grow and acquire new companies, **frequent changes** to the CRM/tech support package were necessary. Unfortunately, making simple changes with the existing solution was very expensive and time consuming.
3. **Emails were frequently lost** due to **unclear ownership** of issues. Often a tech support engineer would email a customer with a possible solution from his personal email address. A reply from the customer would be unanswered if that engineer was on vacation, sick or had left the company.
4. Due to the **poor reporting capabilities** of the system, management was unable to drive improvements and monitor the system for hot spots. They wanted a system that would alert them to support process failures rather than finding out from customers.
5. **Reduce time and cost** associated with providing tech support. If customers could access an online system that “helped them to help themselves” it would allow the company to avoid hiring additional support staff and provide a support system that was available 24/7.

EnterpriseWizard + Adapt Data Solutions = Success

The company was able to test drive the system using [the 30-day free CRM/Issue Track Database trial](#). Adapt Data Solutions staff were able to create a fully working prototype within a few days, import existing tech support tickets from the legacy system, provide training to tech support personnel and launch the system within 3 weeks – prior to the expiration of the 30 day trial!

The system was delivered ahead of schedule and under budget. It immediately received praise from support staff, management, field reps and customers.

Solution Benefits

- Zero IT administration/maintenance costs using the EnterpriseWizard Software as a Service (SaaS) model
- Rapid deployment with very little risk to the company
- System changes can be made quickly and at little to no cost
- Advanced reporting system provides insight into operational issues
- Complex business processes can be streamlined – leading to unexpected savings and improved team efficiency
- Ability to expand the solution to address other business issues

Web-based Product Repairs & Tech Support Integration

The company had previously used Lotus Notes to manage customer product repairs for several years. The system was cumbersome to use, lacked reporting, and required a developer on staff to make changes.

The company decided to pursue a single integrated system: [web-based product repairs and tech support on the EnterpriseWizard platform implemented by Adapt Data Solutions staff](#). Several factors led to this decision:

- Success of the tech support solution provided by EnterpriseWizard + Adapt Data Solutions staff
- Using the advanced reporting capabilities of EnterpriseWizard, they would gain better visibility to repair department issues: cycle time, product failure root-cause, field MTBF
- Repair management is a natural extension of the tech/customer support. Most companies treat product repairs as completely separate from tech support functions. From the customer experience, this translates to:
 - A call to tech support
 - Tell us your name, phone, product, version, symptoms, etc.
 - “Try X, try Y, try Z... ok, call the repair department to send it in for repair”
 - A call to the repair department
 - Tell us your name, phone, product, version, symptoms, etc.
 - “Ok –here’s how you send it in to us.”

By integrating repairs into the existing system, tech support issues and repairs could be *linked*. Repair personnel could easily click a link within the repair order to see the preceding tech support ticket... now they knew what had been tried prior to returning the device.

Providing & Tracking Product Downloads from CRM Systems

As the company provided a software product line and many user manuals, they needed to allow customers to login to a website and download product updates. One consideration was to hire a programmer to create a custom solution to facilitate this. However, the company decided that would have many disadvantages and quickly decided against it.

The EnterpriseWizard implementation was again expanded by [Adapt Data Solutions staff to facilitate customer product downloads](#). This solution had several advantages of simply placing downloads on a webpage:

- Customer downloads could now be tracked. The company could gain insights into which products were downloaded most frequently, which world areas were requesting downloads, and even how often specific customers were downloading products. In the event that a critical defect was later discovered in a product, the company now had the ability to **send a notification to only the customers who had downloaded a defective product** (rather than the entire install base).
- Easily control which customers had access to licensed products using EnterpriseWizard group permissions.
- No need to have a web developer on staff to update the product downloads page... the support team were now able to change the system whenever a new update was available.
- Customers could “subscribe” to product updates for just the products of interest.

Embedding eLearning in Online Tech Support

The company wanted to provide an on-line eLearning system to customers but lacked a system to provide this training. They considered creating eLearning “modules” and using web developers to place links to the content on the website. They decided against this approach for many of the same reasons as not placing product downloads on the website – instead, choosing to embed it within EnterpriseWizard. In a few days, the Adapt Data Solutions staff was able to further expand the [online product support system/CRM to deliver eLearning](#) (created in Adobe Presenter).

The company’s customers absolutely rave about the eLearning system embedded in the EnterpriseWizard implementation – leading to increased customer loyalty and fewer support calls.

Monetize Customer Support Services

Over time, this company was able to dramatically increase the level of support services while lowering costs. The management team felt that the Adapt Data Solutions staff was able to successfully implement every aspect of the system without an issue. However, that’s not the end of the story.

This company took the system a step further by monetizing their support package. How? They structured three tiers of customer access to the system:

- Free level... access basic support information for an individual. (FAQs & tickets)
- Lite level... free level plus ability to view additional training modules and a subscription service for product update bulletins.
- Plus level... Lite level plus ability to view all support tickets within the customer's company and download all product updates.

Adapt Data Solutions staff were able to structure this system in just a few days. The company now has thousands of "free users" as well as hundreds of "paid users" who pay subscription fees to access the system. They were able to **successfully change a customer support department into a profit center** by creating "added value content" and using Adapt Data Solutions/EnterpriseWizard to deliver that content to customers willing to pay for it.

About Adapt Data Solutions

Adapt Data Solutions is a software services and development company dedicated to helping our clients improve their bottom line with the best tools and processes available. ADS is based in Ames, Iowa and was founded by Patrick Rundall, a 17 year veteran of the software systems industry with a strong background in Software-as-a-Service (SaaS) systems, quality management systems, leading customer support teams, and software consulting/professional services.

Adapt Data Solutions is a certified [EnterpriseWizard](#) reseller with years of experience with this award winning CRM package.

Contact Adapt Data Solutions at: sales@adaptds.com

About EnterpriseWizard

With headquarters in Silicon Valley and resellers worldwide, **EnterpriseWizard, Inc.** is the leading provider of powerful, affordable, and easily deployed 100% web-based business process automation (BPA) solutions for organizations of all sizes.