klever insight
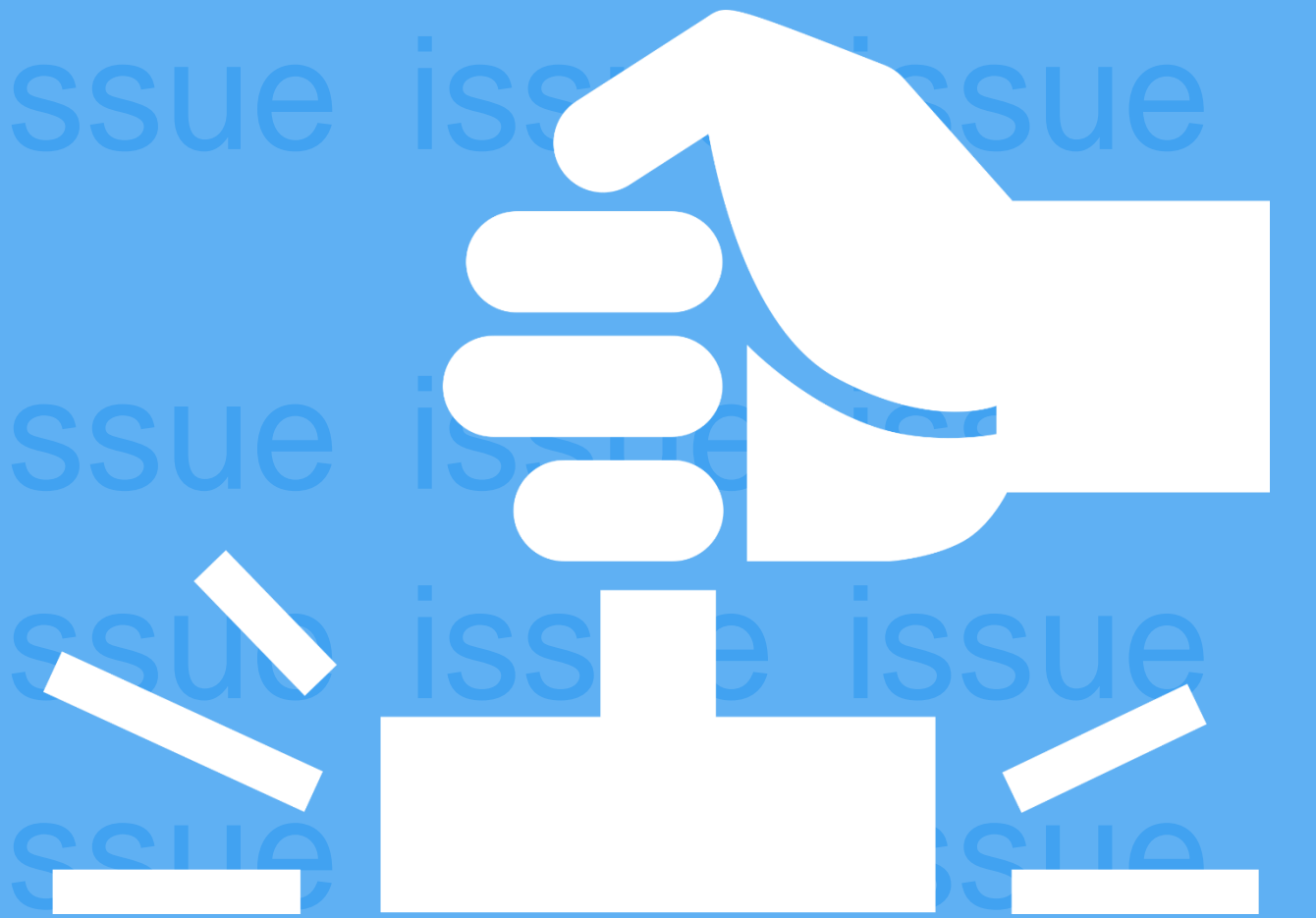
A Digital Strategy Coach for Managers

Because it isn't enough to follow a process

It is more impactful to continually improve the process
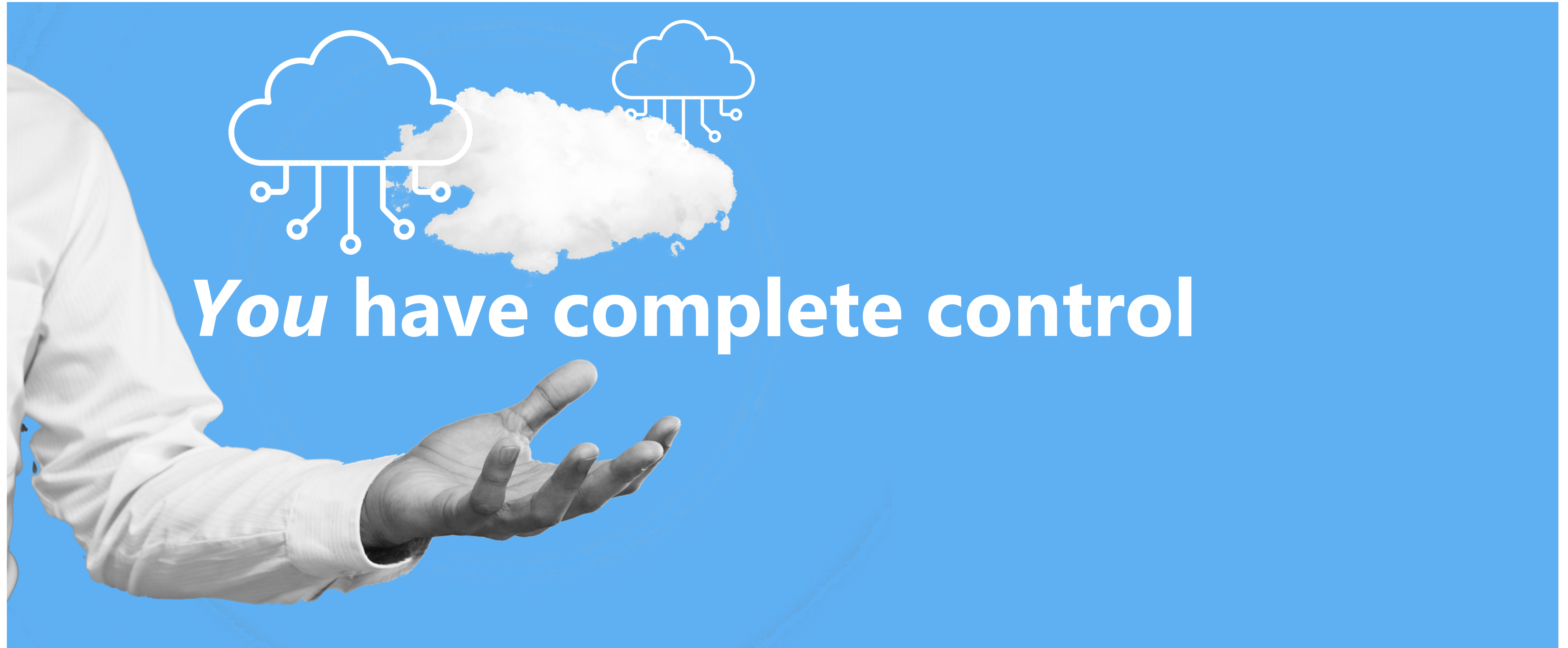
We *had* complete control

RESOLVED

one throat

In return you had

to choke

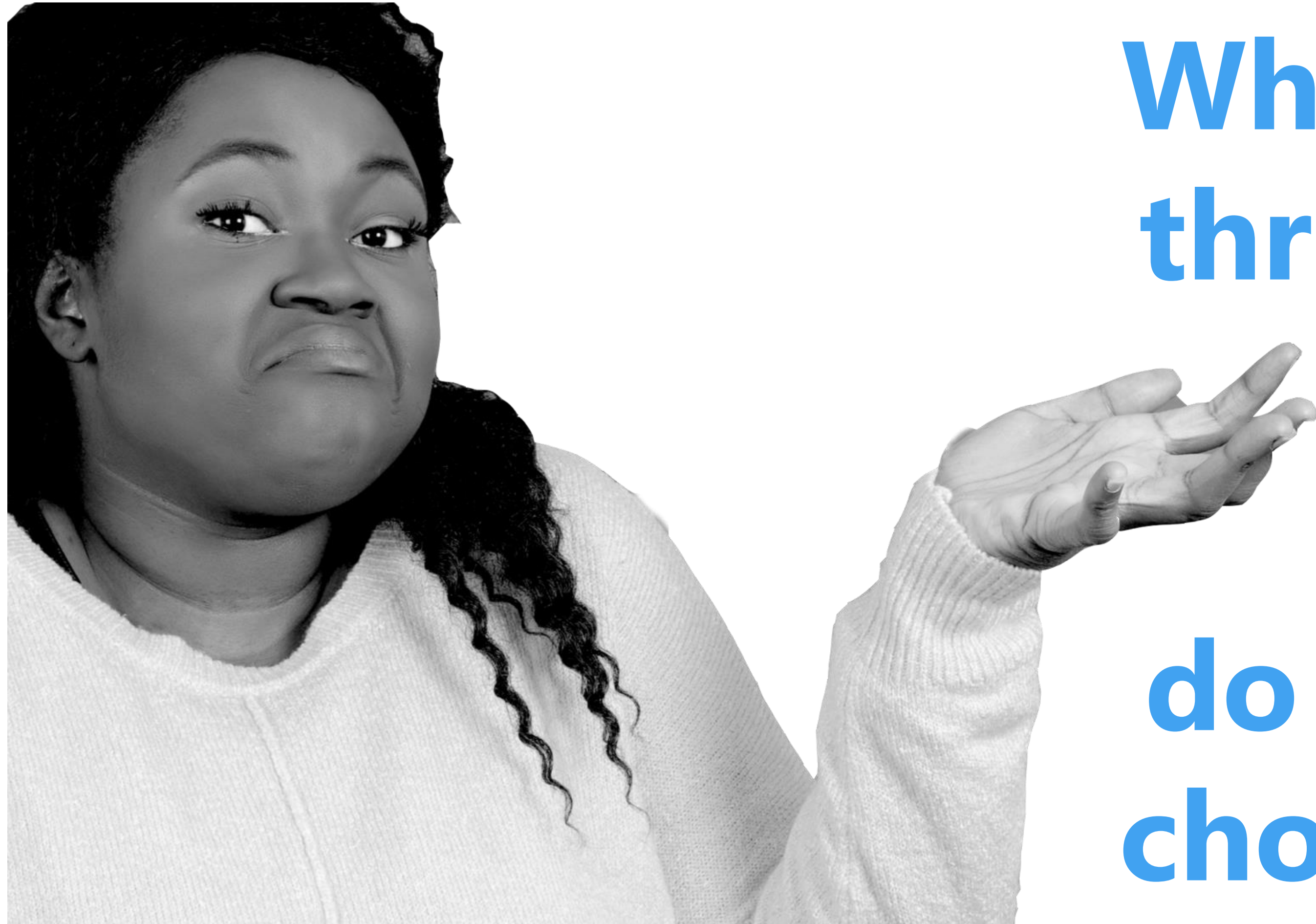# Early 21st century: SaaS happened

You have complete control
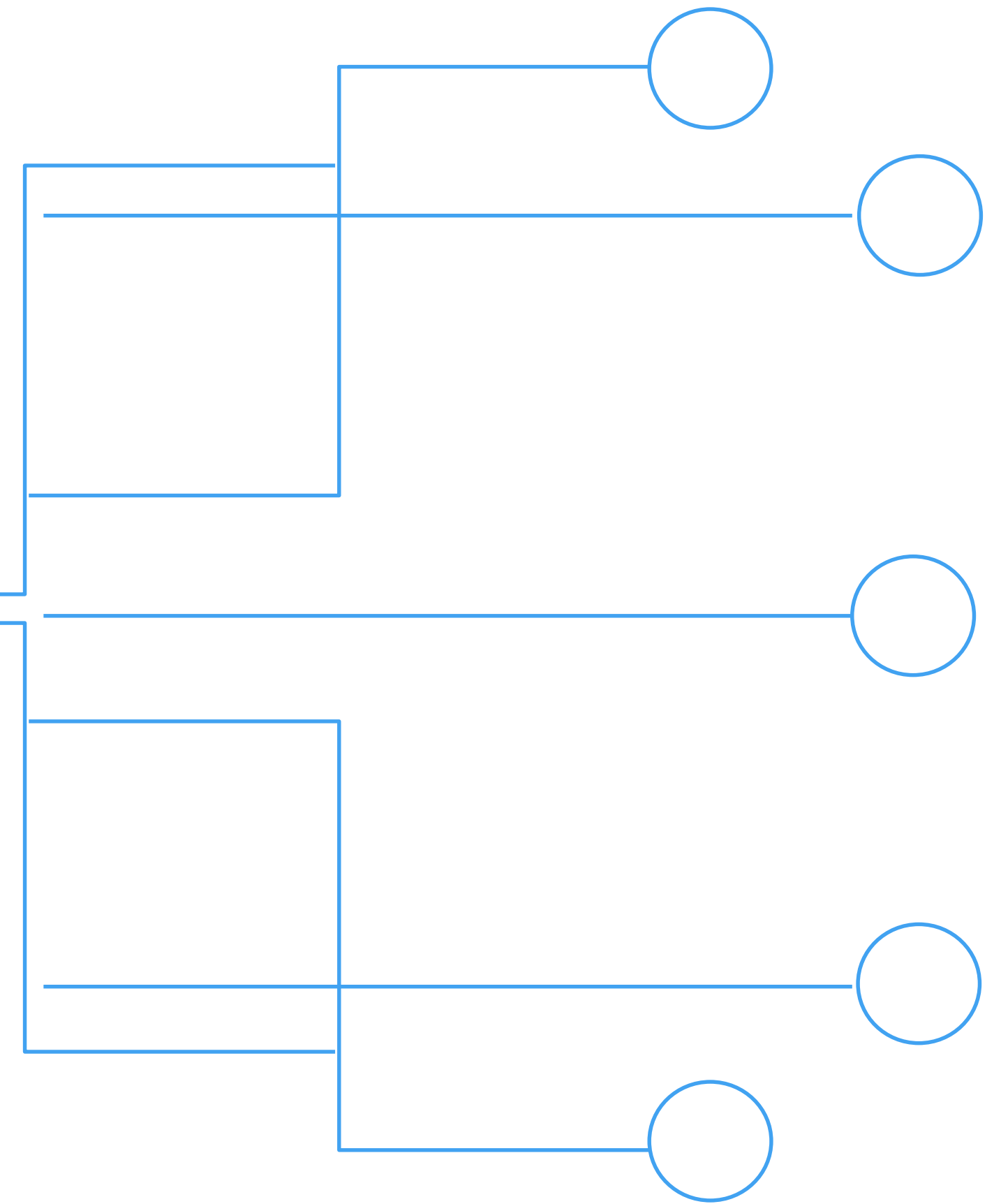
Whose throat

do *we* choke?

Leaders come up with strategic plans...

...and hand them to managers to make happen

- Becoming Proactive and Preventative

- Knowledge Management Best Practices

- Skills and Professional Development for Staff

- Collaborating Better Across Groups

- Selecting and Implementing "Best of Breed' Technology

- Rationalizing Metrics

Managers have a tough time

Leaders

Consultants

Agents

RPA/Chatbots/ Self-service

Managers have a tough time

83% More time spent by managers of low-performing teams putting out fires and dealing with tactical issues*

18% of managers have the high level of skills needed to manage others*

* Gartner

The single biggest obstacle to managers thinking strategically?

Measurements. Specifically bad measures with goals on activities

One that facilitates an environment of control and compliance, not learning and dialogue.

* Gartner

We get what we measure

From an employee's point of view...

....measures are a way to communicate what is important to an organization

Open Customer Metrics Framework
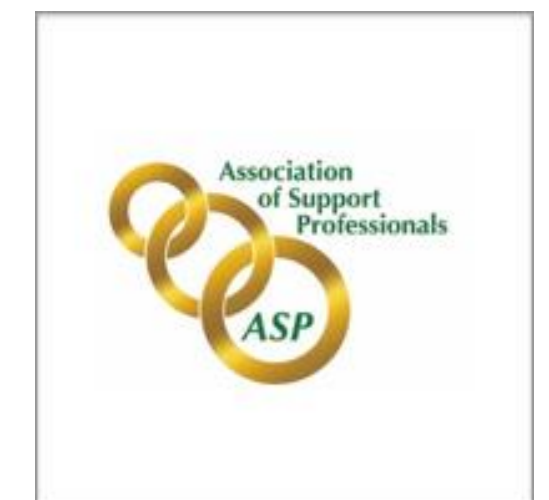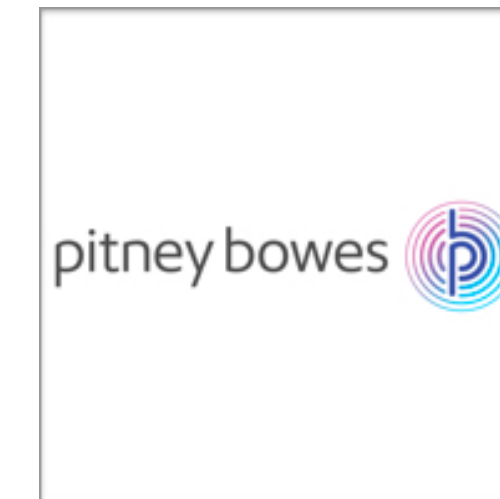
"The Open Customer Metrics Framework has initiated an important industry-wide conversation on the five key performance indicators in our business:
Customers, Employees, Business, Knowledge/Collaboration, and Acceleration.
Being on the ground-floor of this effort ensures Hewlett Packard Enterprise
is at the forefront of driving customer and business excellence."

~Mark Arnold, Senior Director, Strategy & Operations,
Hewlett Packard Enterprise

"Open standards help increase adoption and bring innovation through the collective wisdom of the community. The Open Customer Metrics Framework will benefit both the industry and our members by providing a standard set of metrics everyone can agree on and use ."

~Paul Esch, Director of Strategy & Development,
TSANet

ocmf group

- ***Five categories*** **of measures, and within that, suggested measures for executives and suggested measures for managers**
- ***Balance*** **between listening to our Customers, Employees and the Business, and applying what we learn**
- ***Framework*, adjust according to your needs**
- ***Working definitions*, not looking for precision**

High Level Category

Category	Definition	Focus	Rationale
Customer	How well are we meeting the needs of customers?	20%	The reason we exist
Employee	How well are we meeting the needs of employees?	20%	Knowledge workers need meaningful work
Business	How well are we meeting the needs of the business?	30%	Expanding the focus outside just cost
Knowledge/ Collaboration	How well are we capturing and re-using what we already know?	20%	60 – 90% of what we do has been done before
Acceleration	What is the rate of progress against projects that will transform our business?	10%	How do we ensure we make progress on the 'important' not just the 'urgent'.

High Level Category

Measures for executives	Measures for managers
Options include: • Level Zero Solvable • Time to Publish • Ratio of New to Known Incidents being handled by the Support organization	Options include: • Attach Rate • Level Zero Solvable • Reuse Rate • Participation Ratio • Article Quality Index
Emerging Measures: • Collaboration Effort Score (all teams) • % of Knowledge-driven Suggestions that are Accepted	**Emerging Measures:** • Collaboration Effort Score (for team) • Trend of Knowledge-driven Suggestions made

How do we get managers to think strategically?

- **Stop obsessing over efficiency**
- **Guide, don't grade**
- **Get their input into the problem and include them in implementing the solution**
- **Context and Intent**
- **Guidelines and Guardrails**
- **Bite-sized chunks, based on behavioral science**
- **Advanced tip: 'EEK' sandwich**

Even if managers had more time, they won't be able to magically improve productivity, efficiency, and the performance of their teams

Klever Insight enables managers to 'Leap' ahead with the next best steps to continually move forward projects and roadmaps, while still rocking their day jobs

'Leap' -- example of *Guideline*

Leap 1
Clearing the case backlog

Step 1

Pull a consolidated backlog spreadsheet.

Description

Tip

Description

This leap walks you through the process of clearing out case backlog. There are lots of techniques for clearing backlog (it is often cited as an example of a BHAG or big, hairy, audacious goal). Unfortunately, many of these efforts produce short-term results but often don't address the root cause of the backlog. This approach to reducing backlog will address the root causes.

Linked measures

Cost per case by case category, Percentage of cases resolved with existing knowledge articles, Transactional customer satisfaction

Reason

There are many reasons why large backlogs are unhealthy for a customer service or success organization. The first is the negative effect on customer satisfaction, as customers are frustrated by lingering issues. The second is the effect on case handling and cost. Each team member that has to manage his or her backlog is spending time on issues that have not been (and might never be) resolved. The third is the effect on the team members themselves. Large backlogs have a direct effect on morale, as they are both frustrating and depressing for team members.

Description   ✕

The first step is relatively simple. You need to gather all of the backlogged cases into one spreadsheet. We suggest that you gather at least the following fields:

1. Customer name
2. Customer company
3. Case ID
4. Short description of issue
5. Last modified date
6. Case owner
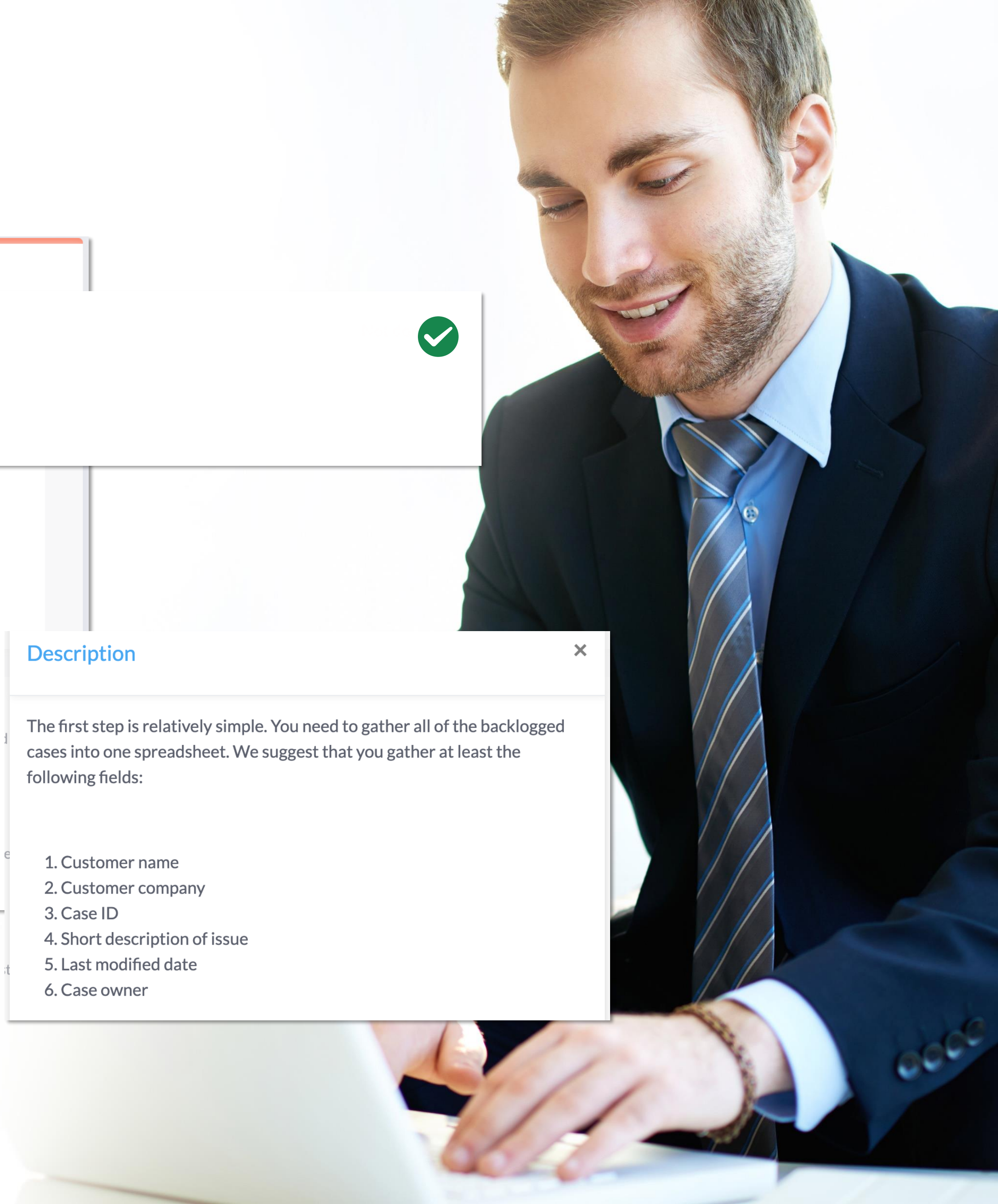
''Leap' -- example of new measure & *Guardrail*

Leap 1

Calculate: Time to competency for new skills or new team members

Description

This leap will help you calculate a measure that many organizations struggle to calculate. The time it takes for a new team member to be competent or an existing team member to acquire a new skill is an important component of the cost of delivering your team's services. Reducing this cost is crucial to delivering the same or better service to customers.

Step 1

Send out competency attributes to all team leaders and ask them to provide a baseline approximate measure for any new hires in the last quarter (or appropriate time given your turnover rate).

Description

Tip

Tip

3. Watch out for individual biases in measurement. They are likely to come out at this point. Different managers have different ideas of what "working independently" means. Use this process of circulating the baseline attributes as an opportunity to evaluate the difference (and potentially adjust results from managers whose results vary significantly from all of the others).

'Leap' example of *Context*

Leap 1

Identify sources of rework in the support process

Description

The focus of this leap is to identify where the support or success team is doing rework. The leap will walk you through the process of identifying rework in cases that were closed but are reopened by customers or by colleagues and re-escalating cases that were escalated once to another team (for example, sustaining engineering or product management). Tracking the rework will set up the rest of the leap, identifying ways to reduce rework and putting these different approaches into action.

Linked measures

Time to Resolve by agent, Average number of interactions per escalated case, Cost per case by team

Reason

Rework is the most costly effort for an organization with the least tangible benefits. If you think of the knowledge of the support and success teams as assets of the organization, then rework adds no new assets. It only adds costs. Beyond the cost ...pens employee satisfaction. Our industry is full of stories about teams that worked all ...omeone in the office had solved the issue the week before.

Tip   ✕

Frequency is a good starting point for analyzing this type of data because it overcomes on of the largest challenges in support and success organizations - disconnection from the knowledge of the group. A success manager might understand that a customer frequently reopens cases but not that these same types of cases are reopened by lots of customers. A customer support team member will likely see the cases across customers, but not encounter the same customer all the time.
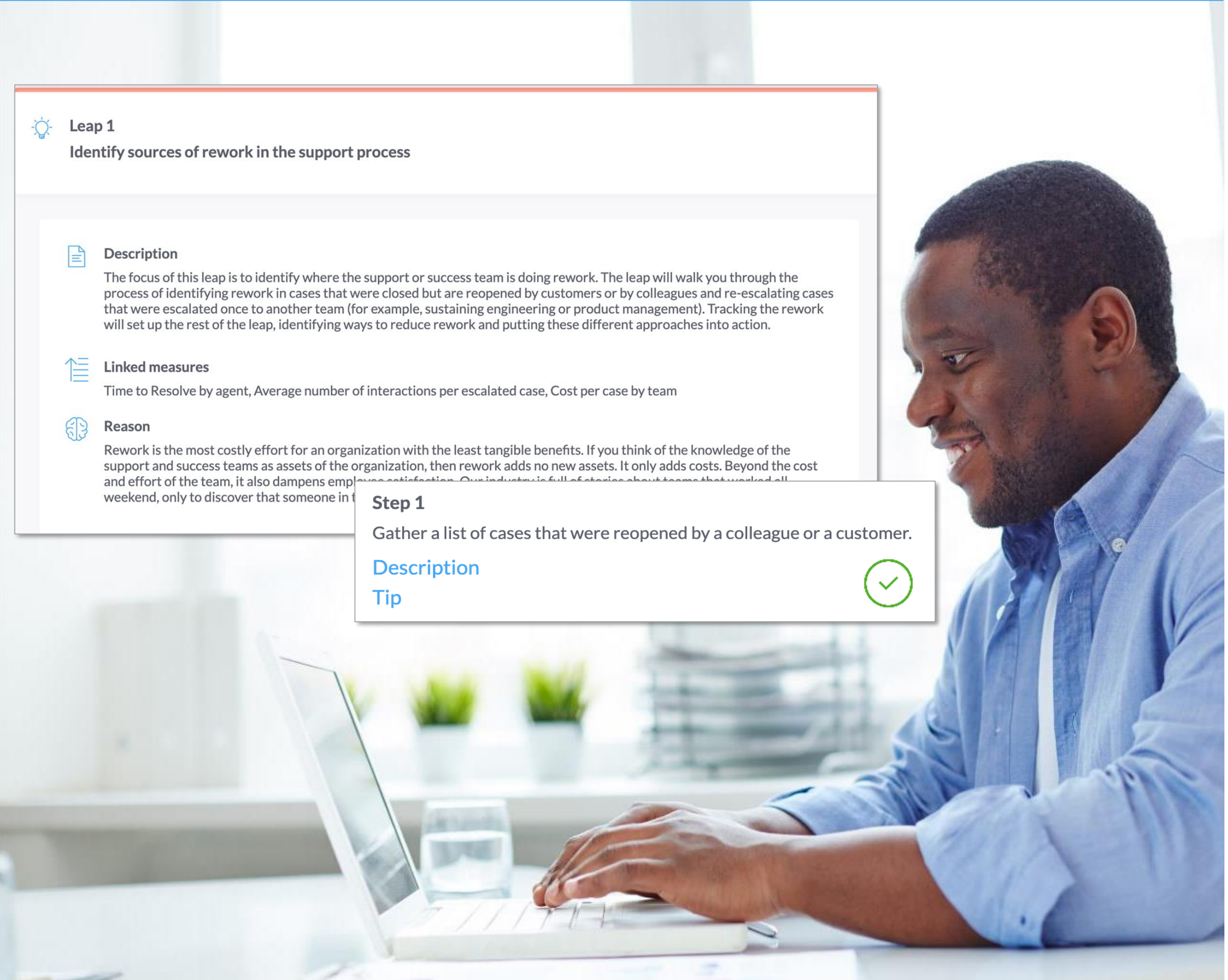
Step 2

Identify patterns in the type of cases/tickets and identify patterns by customer.
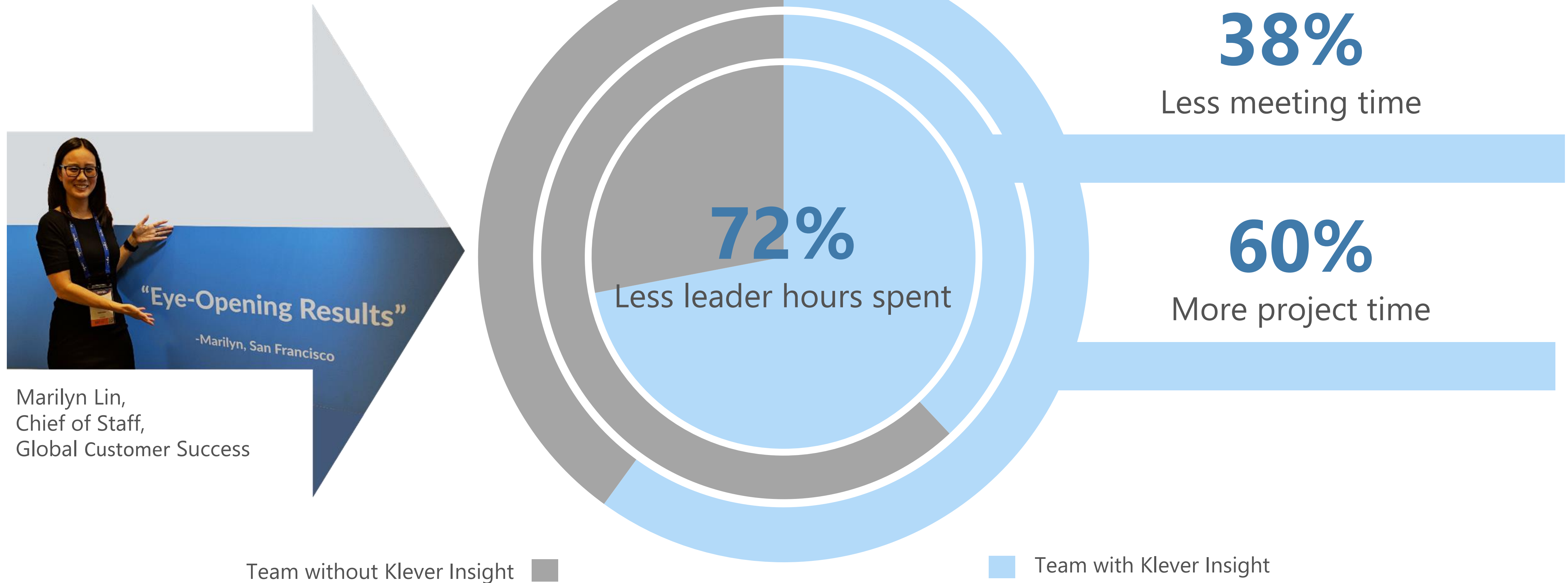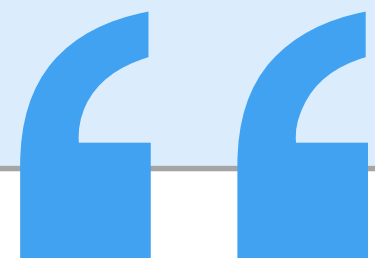
Description

Tip

Enterprise: A/B test – 'Identify sources of rework'

Team without Klever Insight

Team with Klever Insight

Results of A/B test – Team with Klever Insight wins!

salesforce

"Eye-Opening Results"
-Marilyn, San Francisco

Marilyn Lin,
Chief of Staff,
Global Customer Success

72%
Less leader hours spent

38%
Less meeting time

60%
More project time

Team without Klever Insight

Team with Klever Insight

One solution may make it into Service Cloud

"*I cover hundreds of products across 42 categories of service tools.*

Klever Insight is the only product that makes specific, contextual recommendations each day, for what customer support and success teams should do next to improve the customer and employee experience.

What is amazing is that it learns from every use, making the experience and outcomes easier and better for the next user."

~John Ragsdale, Distinguished VP of Research, TSIA

Questions?

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Research Triangle region, North Carolina

Appendix

Comparison

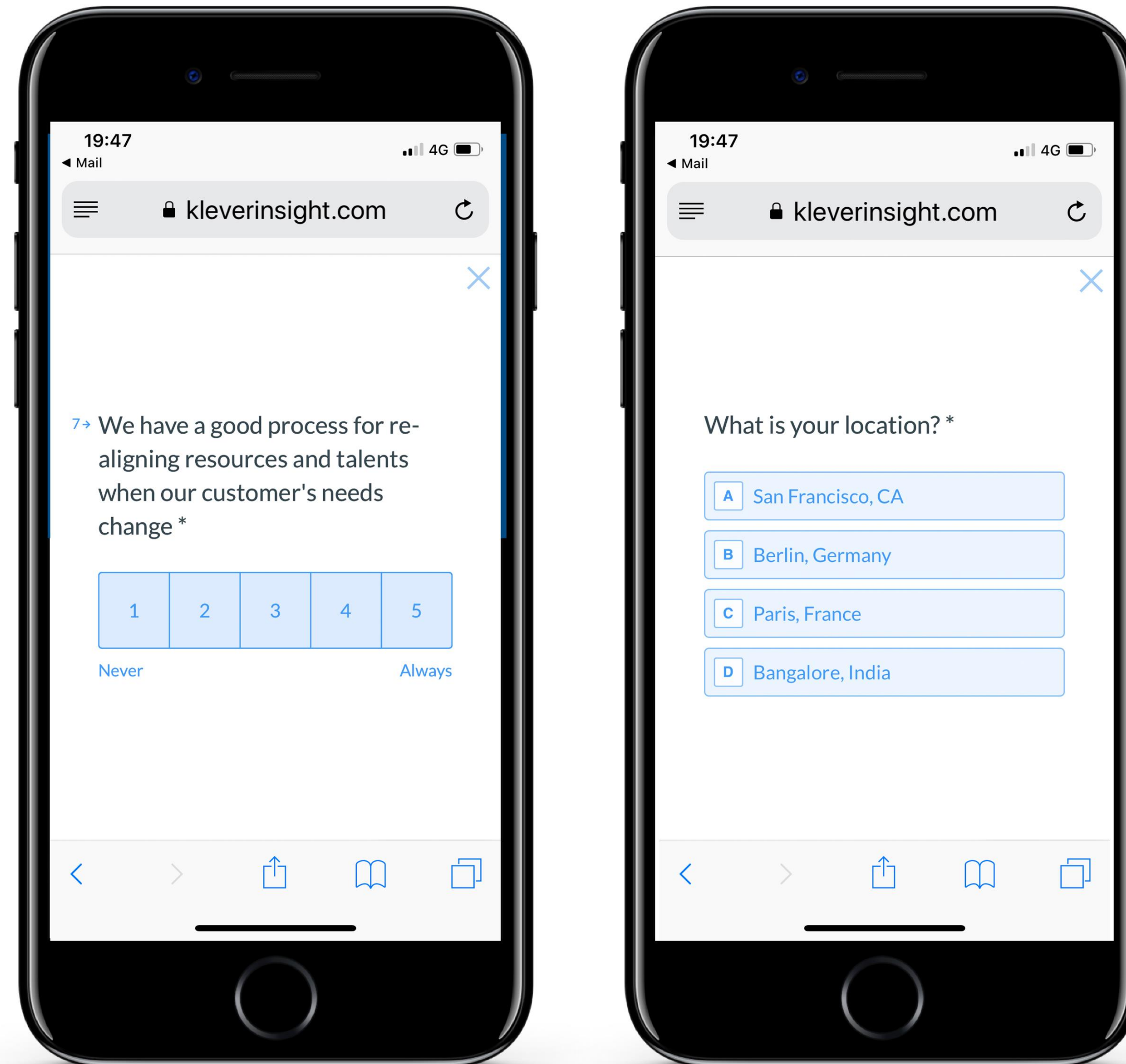| Without Klever Insight	With Klever Insight
Leaders come up with strategic plans, often without employee input	Team Input + Service DNA data clarifies path ahead
Strategy doesn't translate to actionable daily tasks for managers	Bite-sized 'steps, jumps and leaps' balance transactional tasks with strategic thinking, in minutes a day
Measures are outdated, from last century call center type support	Trackable progress with modern measures
Support teams struggle	**Continuous improvement of support**

Employee input into strategy

Multiple Lenses & Service DNA