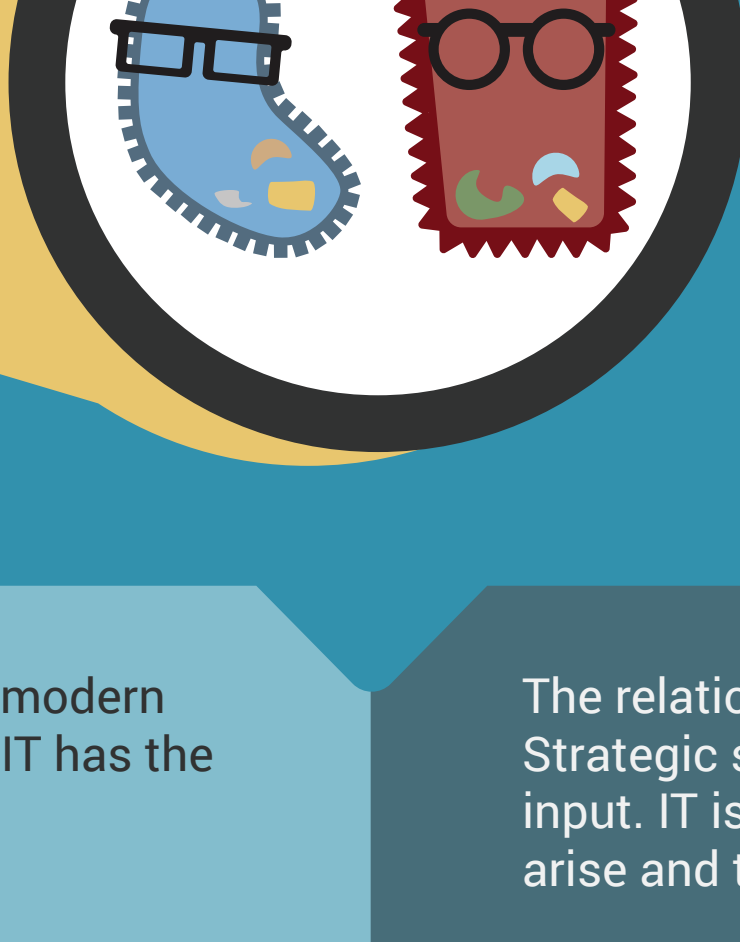
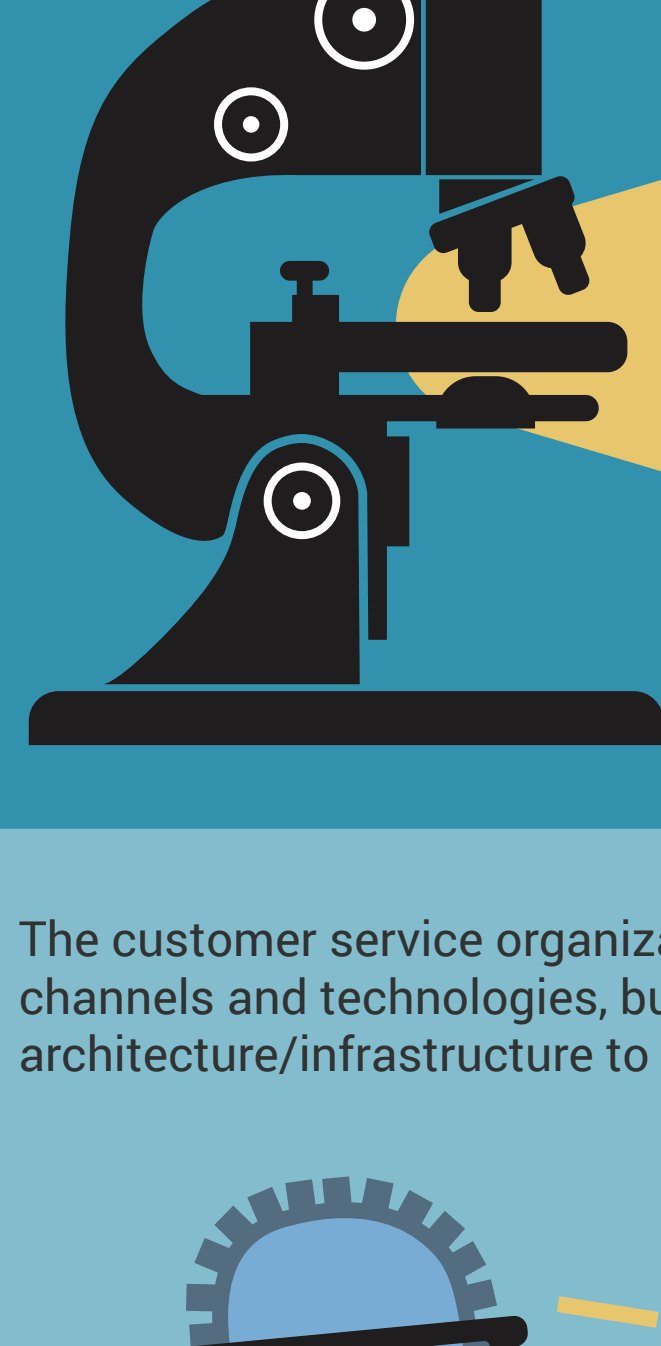


Develop an IT Strategy to Support Customer Service

IT can help pave the way for an external customer service transformation.



Customer expectations regarding service are rapidly evolving. Your current IT systems may be viewed as ineffective at delivering upon these expectations; A transformation is called for.

The customer service organization would like to use modern channels and technologies, but it is unclear whether IT has the architecture/infrastructure to support them.

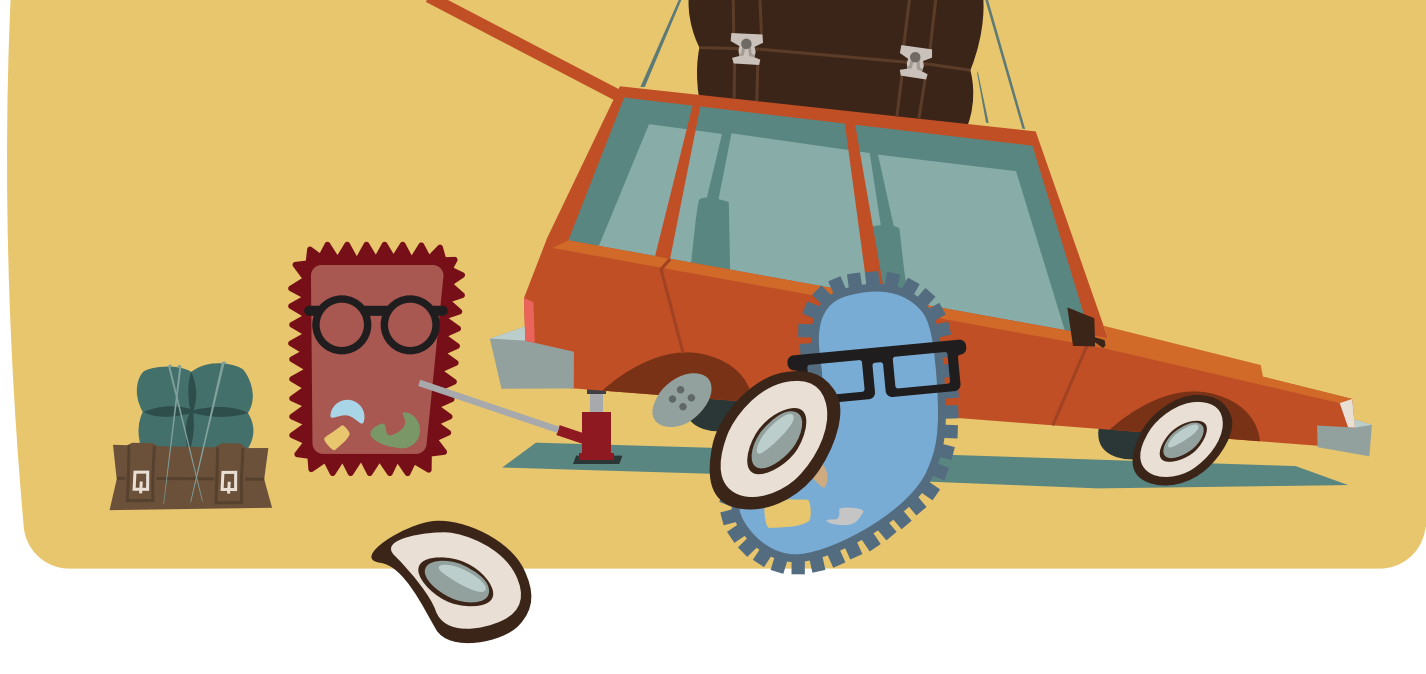
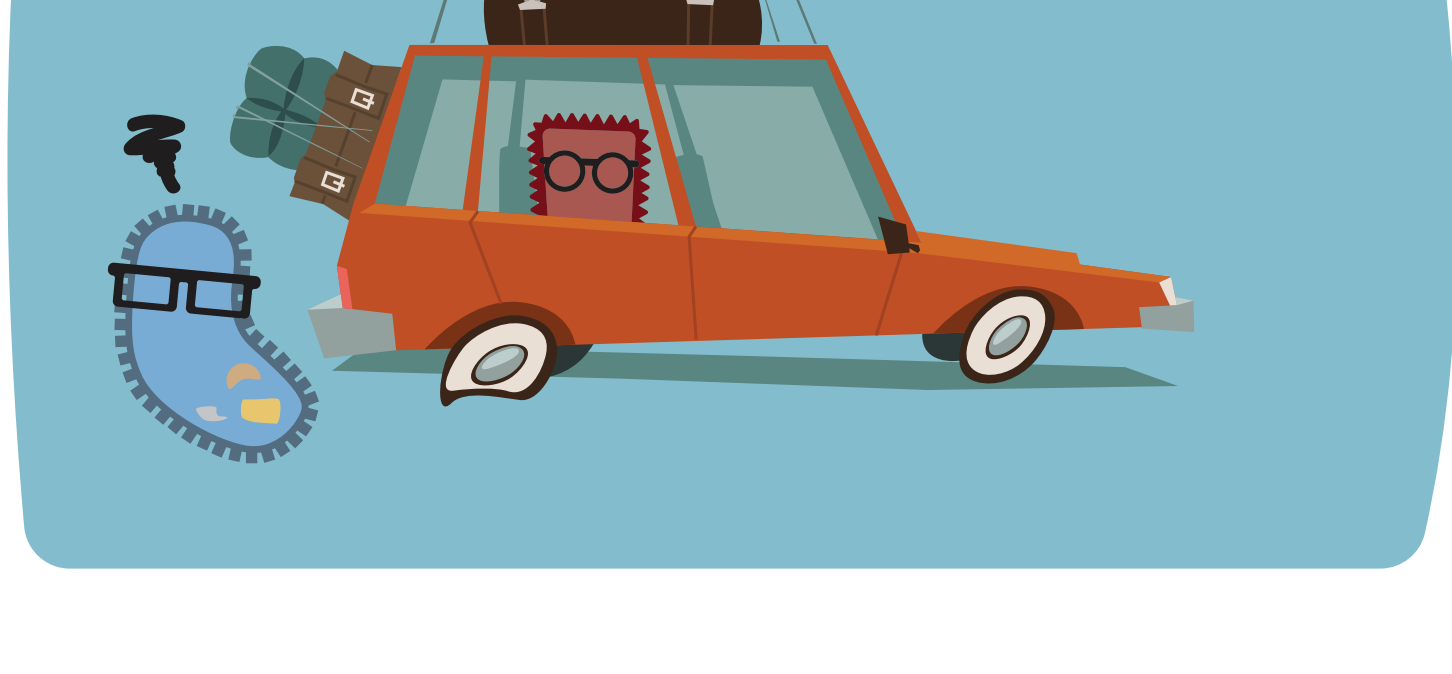
The relationship between customer service and IT is strained. Strategic system-related decisions are being made without IT's input. IT is only engaged post-purchase to fix issues as they arise and to offer workarounds.



Embark on a journey with your customer service organization. Let this project be a starting point for strategic collaboration. Demonstrate to the business that IT understands their challenges, and can help put technology to work to create new offerings and meet their customer service vision. Evaluate business processes and the respective supporting systems to gain a strategic perspective on IT initiatives that will enable your customer service revolution.

If you are a firefighting IT department, consider this project as an opportunity to mend your relationships with the business and transform yourself into a strategic partner and innovator.

Be clear about roles and responsibilities: identify the right process and task owners to ensure project success.



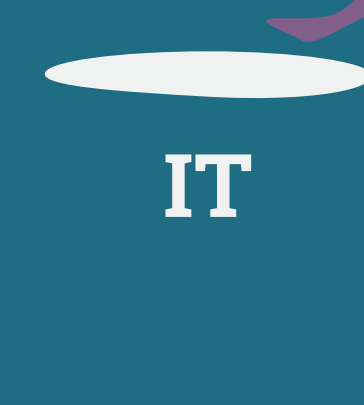
Where transformation is called for, start with future state visioning. Current state analysis can impede your ability to see future possibilities.

Get your house in order by enhancing core or traditional customer service functionality first, and then moving on to more ambitious business enabling functionality.



There are multiple strategies that IT can work with Customer Service to deliver, unlocking their potential business value:

IT is only one or two degrees of separation from the end customer – it's simply a matter of perspective. IT's involvement and collaboration can significantly impact the customer experience.



IT

Customer Service

External Customers

Customer Service Strategy:

Retention

Seamless Multi-Channel Strategy
Proactive Customer Service

Efficiency

Volume Diversion to Lower Cost Channels
Agent Empowerment

Cross-Sell/Up-Sell

Up-Sell and Cross-Sell Opportunities

Info-Tech Recommended Evolution for Customer Support IT Systems:

Build CS Capabilities on Traditional Channels

- 1 Enable Traditional CS Channels
- 2 Improve Efficiency

Engage Customers on Social Media

- 3 Pursue Social Media Channels
- 4 Proactively Provide Customer Service

Enable 360° View

- 5 Identify Up-Sell/Cross-Sell Opportunities

- In-person, mail, phone, fax, email and web
- Facebook, Twitter, etc.
- Cross-channel data integration with sales and marketing data

Although Info-Tech recommends undertaking initiatives that build a solid foundation before embarking on business enabling initiatives, there may be "low hanging fruit" that will increase buy-in and excitement from the business and improve customer service in parallel. Do not overlook these opportunities.

Steps

1. Structure the Project

Info-Tech will walk you through a multi-step process for defining roles and responsibilities:

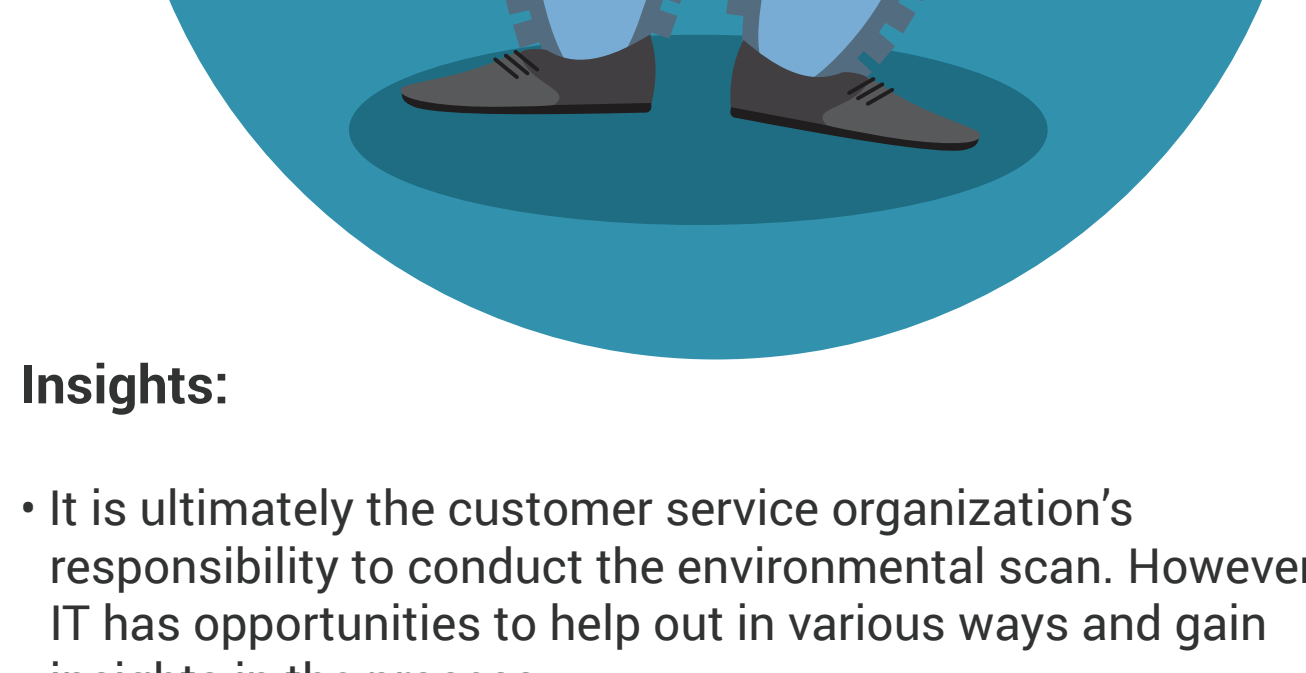
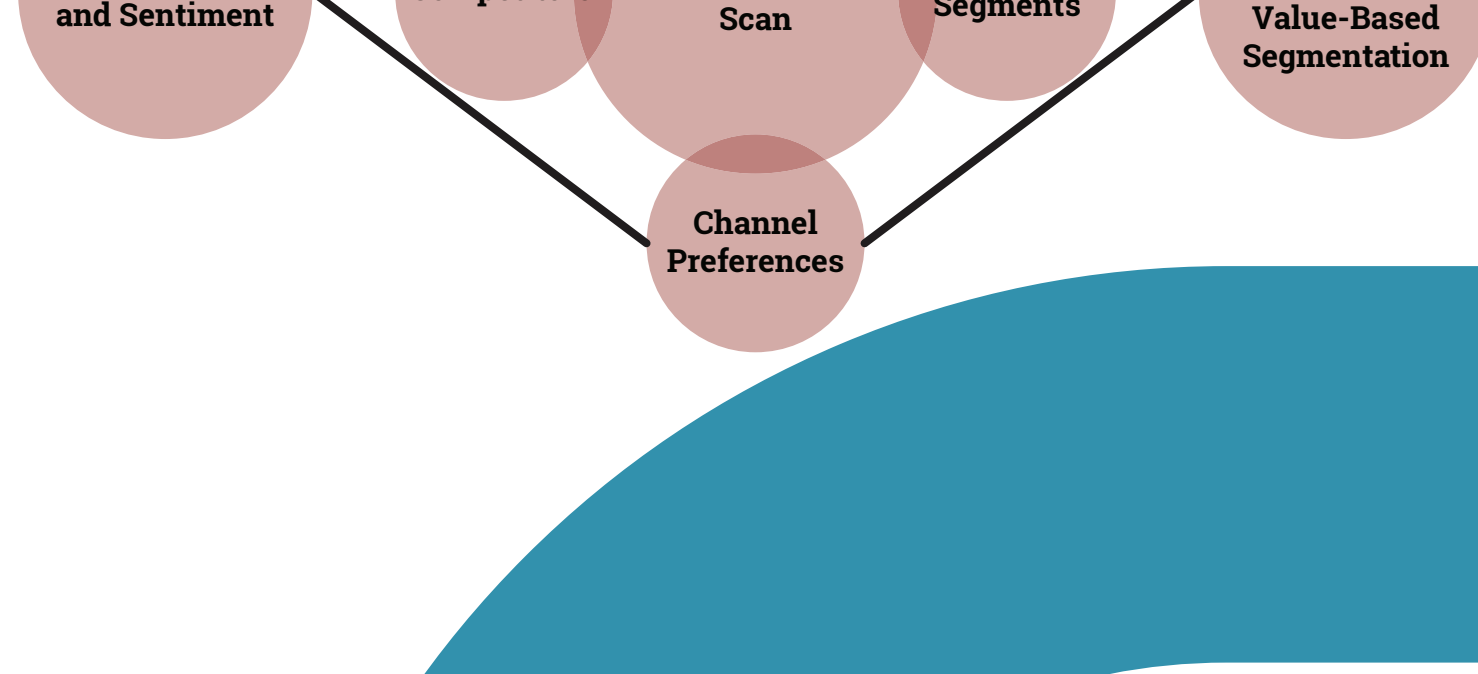
- Identify process owners.
- Outline roles and responsibilities to track project progress and build a collaborative foundation between IT and customer service.
- Develop a project charter as a communication tool for management, project sponsors, and stakeholders.

	Customer Service Head	Customer Service Director	CIO	Applications Director	CEO/COO	Marketing Head	Sales Head
Determine Project Suitability	A	R	C	C	C	I	I
Structure the Project	C	C	A	R	I	I	I
Define Vision for Future State	A	R	C	C	I	C	C
Document Current State and Assess Gaps	A	R	I	C	I	I	I
Evaluate Solutions Options	C	C	A	R	I	I	I
Evaluate Application Options	A	C	I	R	I	C	C
Frame Desired State and Develop Roadmap	C	C	A	R	C	I	I

A Accountable R Responsible
C Consulted I Informed

- IT and customer service must work in tandem from project inception and be involved in all project decisions. IT can offer valuable input on IT-related assessments, solution options, and marketplace application options, as well as insight on integration strategy.
- While involving management is important for high-level strategic decisions, input from those who interact day-to-day with the systems is a crucial component to a well-planned strategy.
- Do not attempt to blindly conduct assessments. Build a basic framework of the project and assign the best-fit roles to tackle each activity.

2. Define Vision for Future State



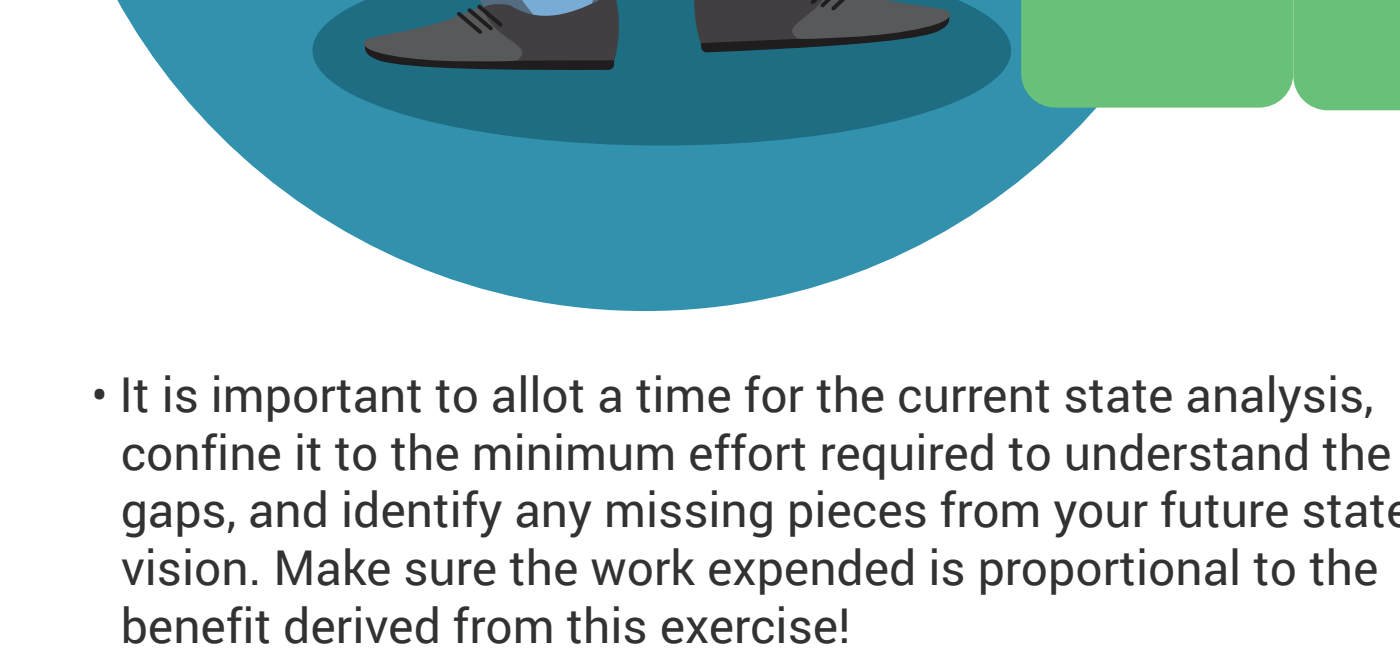
Info-Tech will walk you through a multi-step process for defining the future state:

- Conduct a customer service environmental scan.
- Define the future state vision of the customer service organization.
- Shortlist key customer service business processes that will enable the vision.
- Document future state of shortlisted key customer service business processes.
- Compile preliminary list of system requirements.

Insights:

- It is ultimately the customer service organization's responsibility to conduct the environmental scan. However, IT has opportunities to help out in various ways and gain insights in the process.
- A process-oriented approach helps organizations see the big picture of the system by linking strategic requirements to business requirements, and business requirements to system requirements.
- If a customer service transformation is called for, start with your future state vision. Don't get stuck in current state and the "art of the possible" within its context.
- Use the future state business process models as a source for software requirements.

3. Document Current State & Assess Gaps



Info-Tech will walk you through a multi-step process for evaluating current state:

- Assess the current state of customer service business processes to drive the gap analysis.
- Document the portfolio of customer service-supporting applications and assess their suitability for meeting future state aspirations.
- Revisit the future state business models and adjust if necessary.
- Prioritize and finalize the list of requirements.

- It is important to allot a time for the current state analysis, confine it to the minimum effort required to understand the gaps, and identify any missing pieces from your future state vision. Make sure the work expended is proportional to the benefit derived from this exercise!

4. Evaluate Solution Options

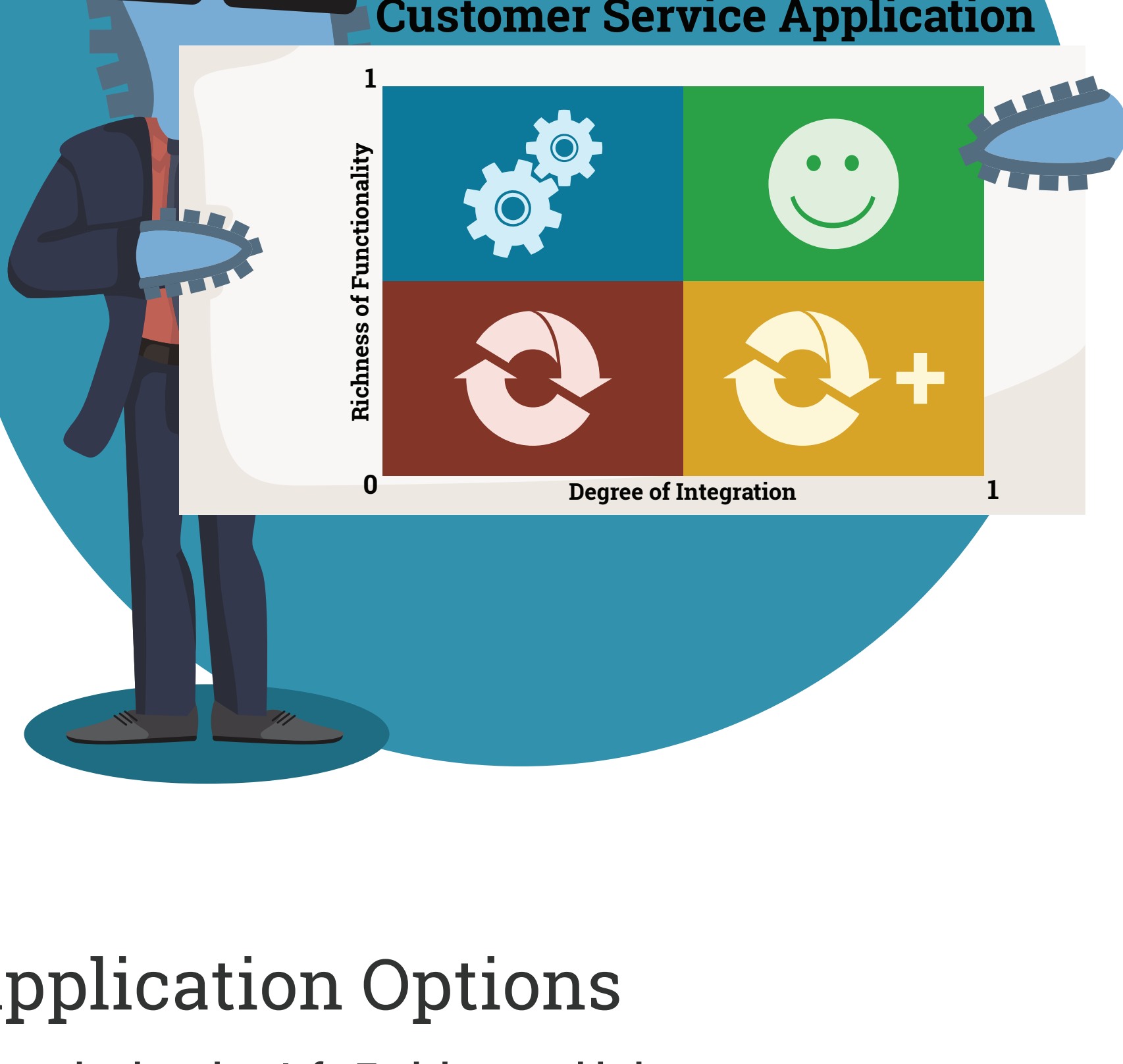
- Integrate:** Application is functionally rich, so spend time and effort integrating with other modules by building or enhancing interfaces.

- Retain:** Application satisfies both functionality and integration requirements, so it should be considered for retention.

- Replace:** Application neither offers functionality sought nor is it integrated with other modules and should be considered for replacement.

- Replace/Enhance:** Module offers poor functionality but it is well integrated with other modules. If enhancing for functionality is easy (e.g. through configuration or custom development), consider enhancement or replace altogether.

Use the Info-Tech CS Systems Health Assessment Dashboard to determine your future direction on critical system architecture decisions:



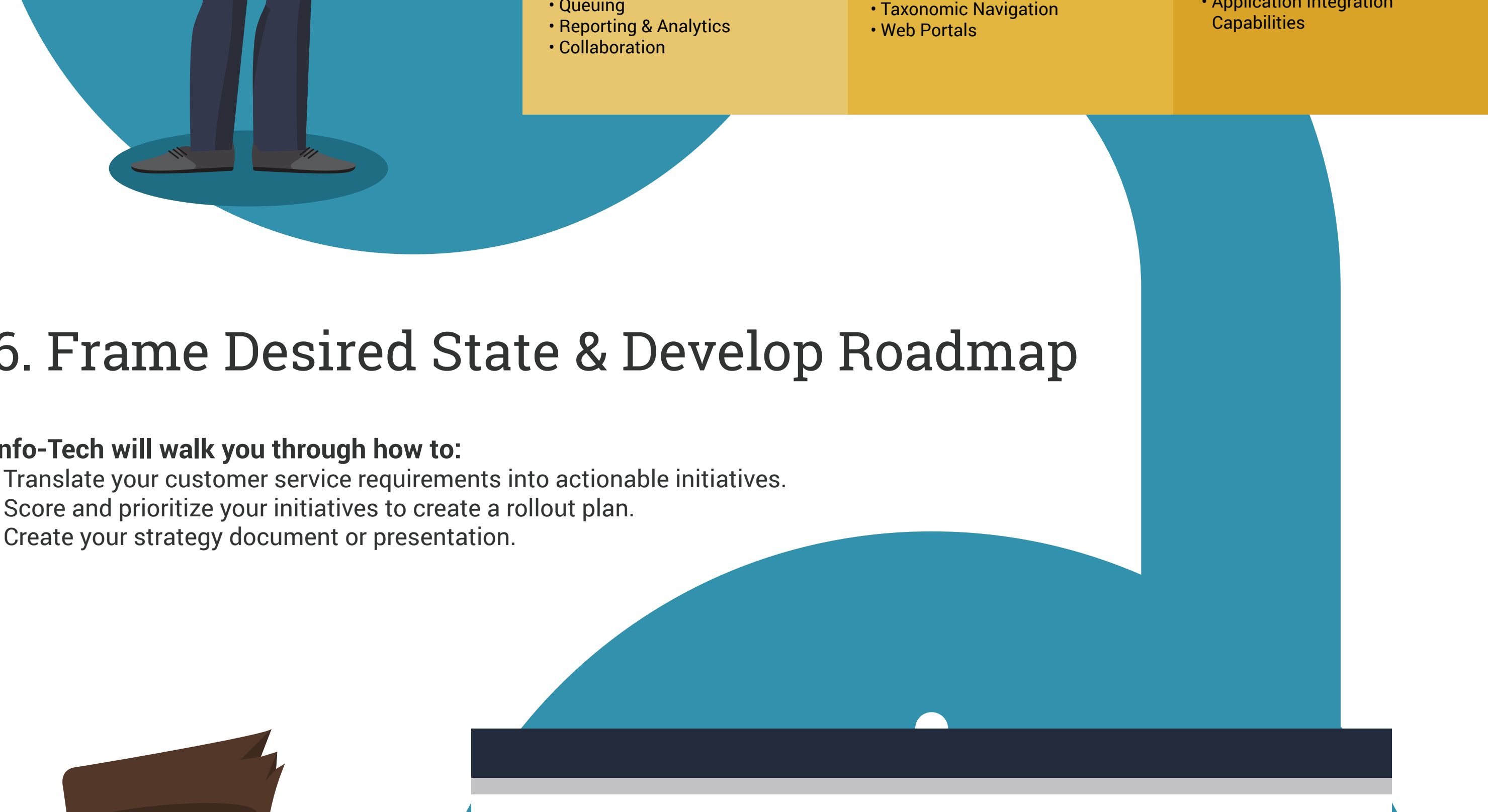
5. Evaluate Application Options

Selecting the right application can be daunting. Info-Tech has provided a high-level summary of how the technology market has evolved:



As well as an overview of the biggest players in the categories of:

- Customer Relationship Management
- Customer Service Management
- Customer Service Knowledge Management
- Social Media Management Platform



6. Frame Desired State & Develop Roadmap

Info-Tech will walk you through how to:

- Translate your customer service requirements into actionable initiatives.
- Score and prioritize your initiatives to create a rollout plan.
- Create your strategy document or presentation.

