

# Roadmap for Customer Service Transformation

How NICE Transformed Customer Service for its Global Customers

**Eyal Lubin**, Director of Global Service Operations, **NICE**



**CCW**  
CONFERENCE & EXPO

**June 26-30, 2017**  
The Mirage, Las Vegas

# Agenda

- **About NICE**
- **Going beyond CRM: The future of customer service**
- **Customer service transformation with ServiceNow**
- **Change management best practices**



# NICE at a Glance

NASDAQ:  
**NICE**

**>25,000**  
Customers

**>85%**  
Fortune  
100 customers

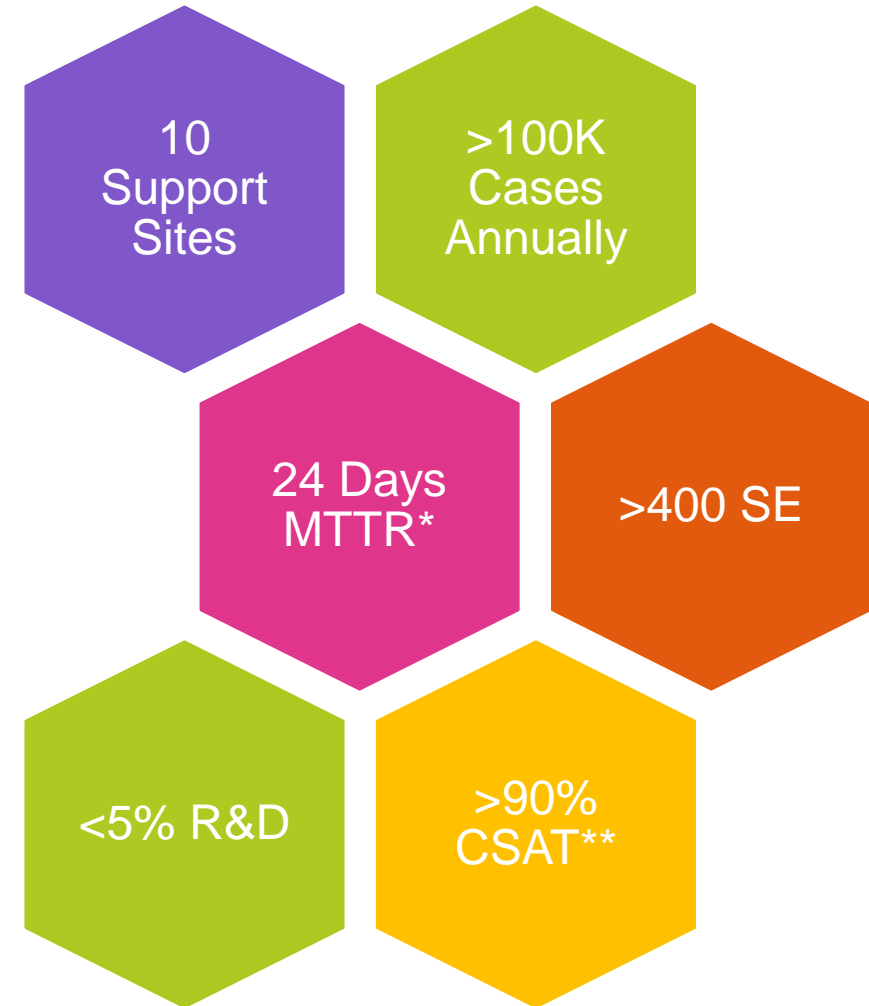
**>150**  
countries

**~5,000**  
Employees

**~1600**  
R&D Professionals

**>35**  
Local Offices

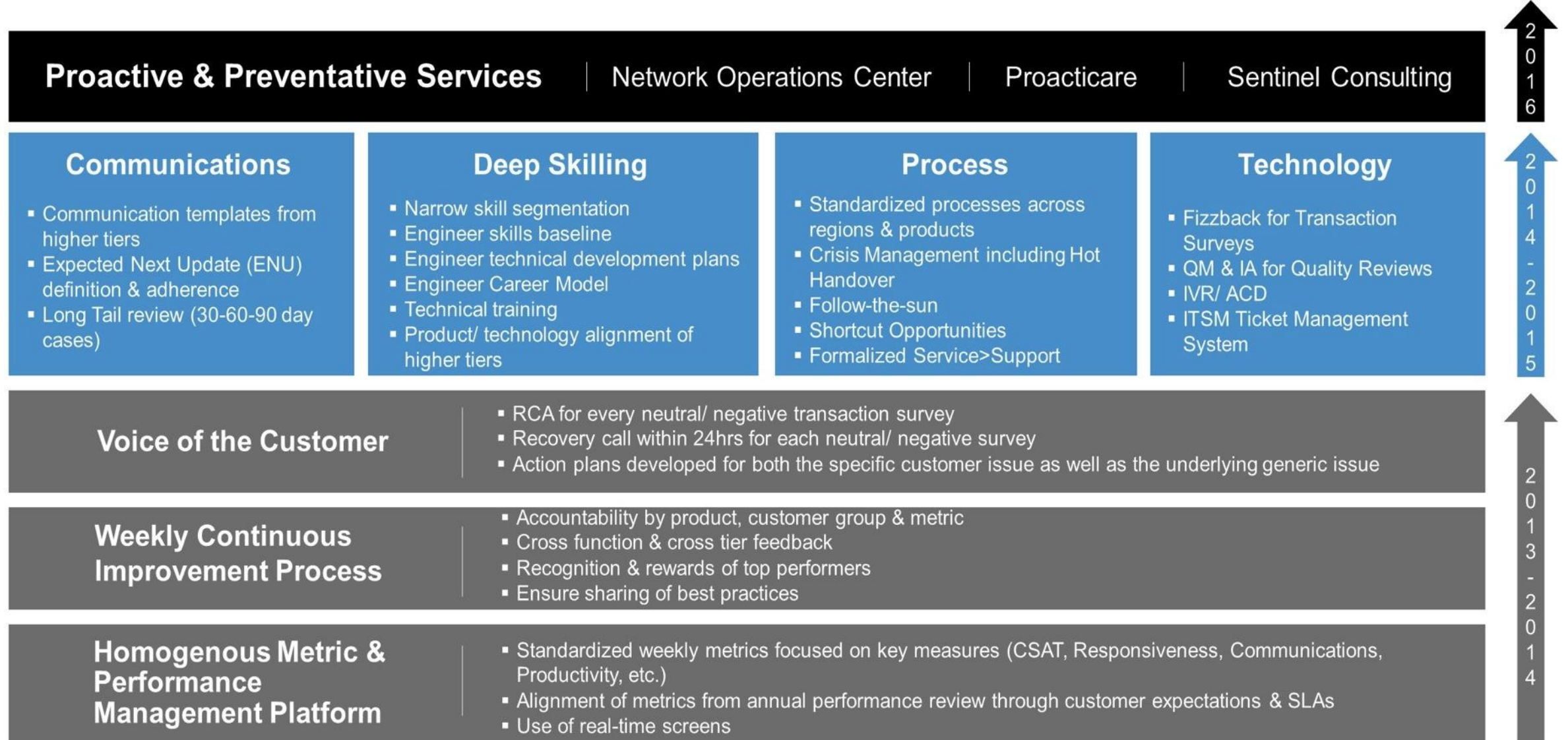
# Global Customer Support at NICE

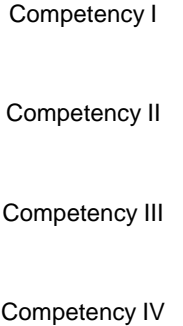
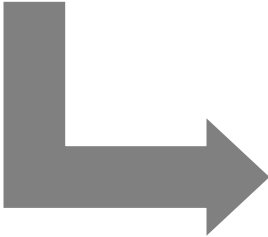


\* 2016 Resolved Cases

\*\* Transactional Survey (top-bottom)

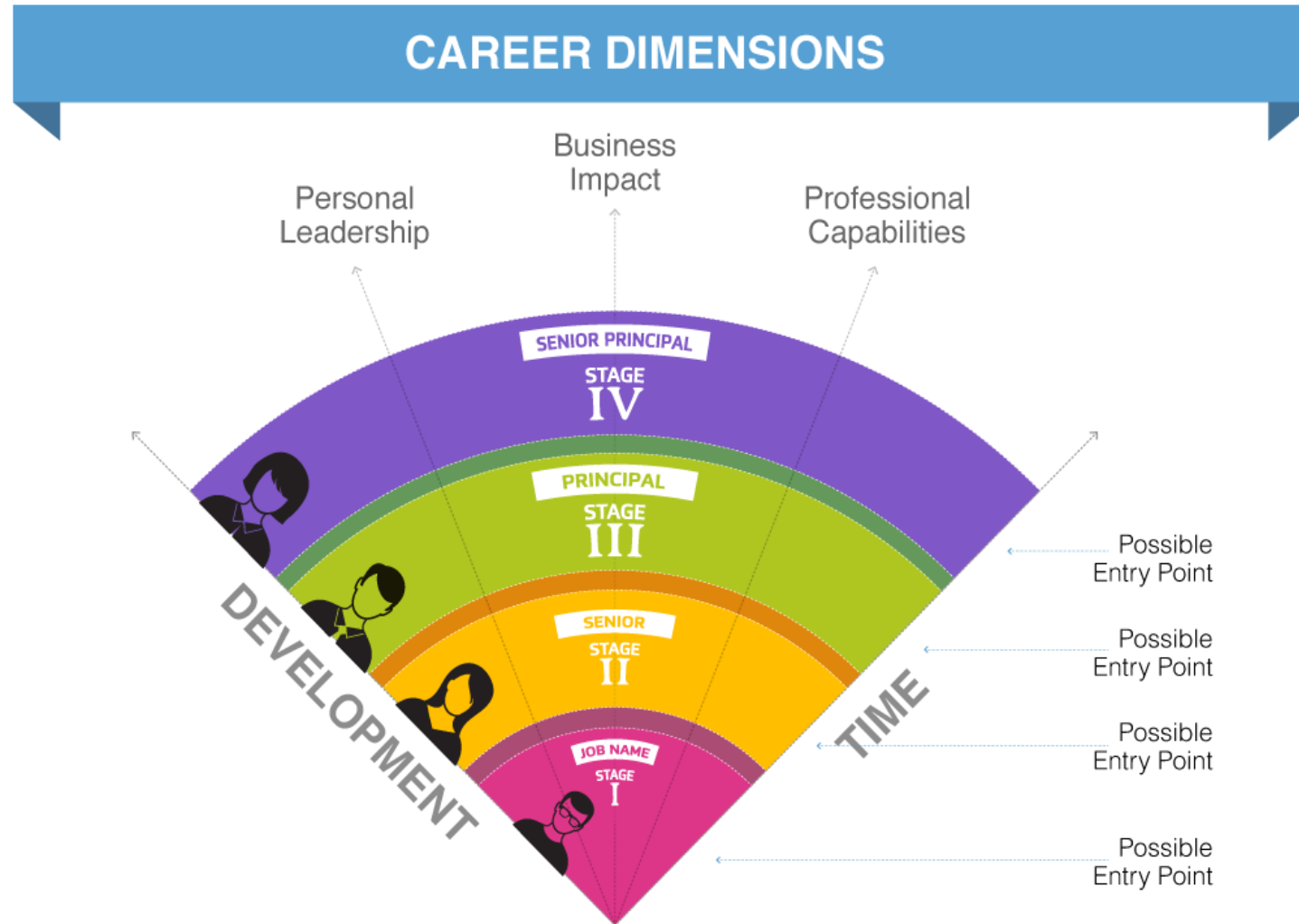
# NICE Customer Support Maturation Framework







# NICE Global Support People: Career Model



# **CUSTOMER SERVICE TRANSFORMATION WITH SERVICENOW**



# Transformation Journey

## New and Improved Case Management

- Intuitive Process
- Enhanced UX

## Collaborative Support

- KCS
- Social

## Customer Empowerment

- Service Portal
- Reports
- Case Deflection

## Automation & Efficiencies

- System Consolidation
- Case Routing
- Event Management

# 10 Processes to Deliver Superior Customer Service

- 1 Case Management
- 2 Service Portfolio and Configuration
- 3 Service Level Management (SLM)
- 4 Knowledge Management
- 5 Customers and Contacts
- 6 Social
- 7 KPIs and Reporting
- 8 Event Management
- 9 Service Portal
- 10 Service Catalog and Request Fulfillment

# Key Capabilities: Deep-Dive



CASE  
MANAGEMENT



SERVICE  
PORTAL

EVENT  
MANAGEMENT  
(NOC)



KNOWLEDGE-  
CENTERED  
SUPPORT



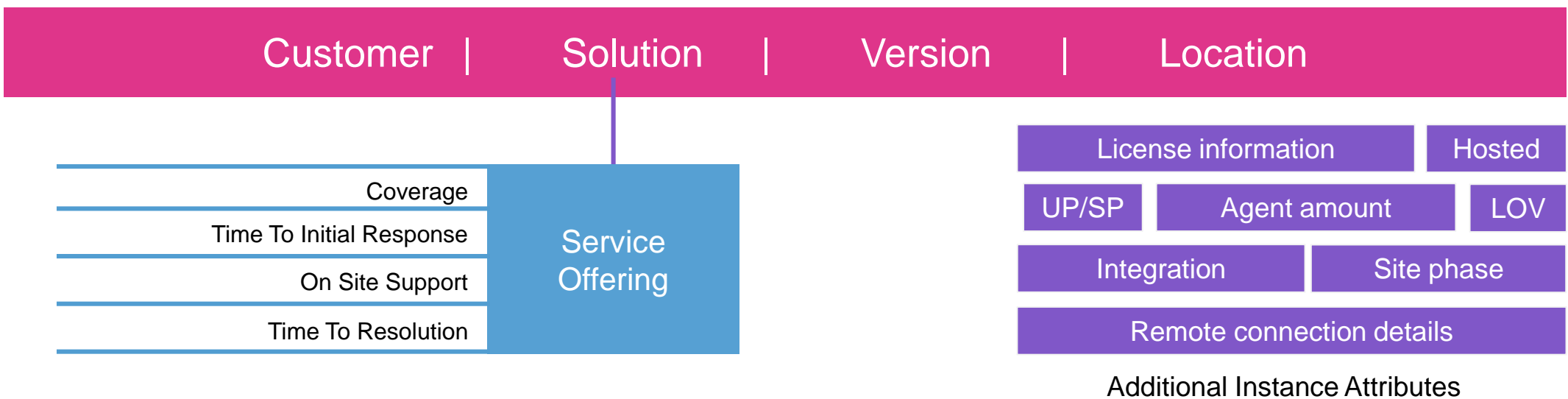
# The New Instance



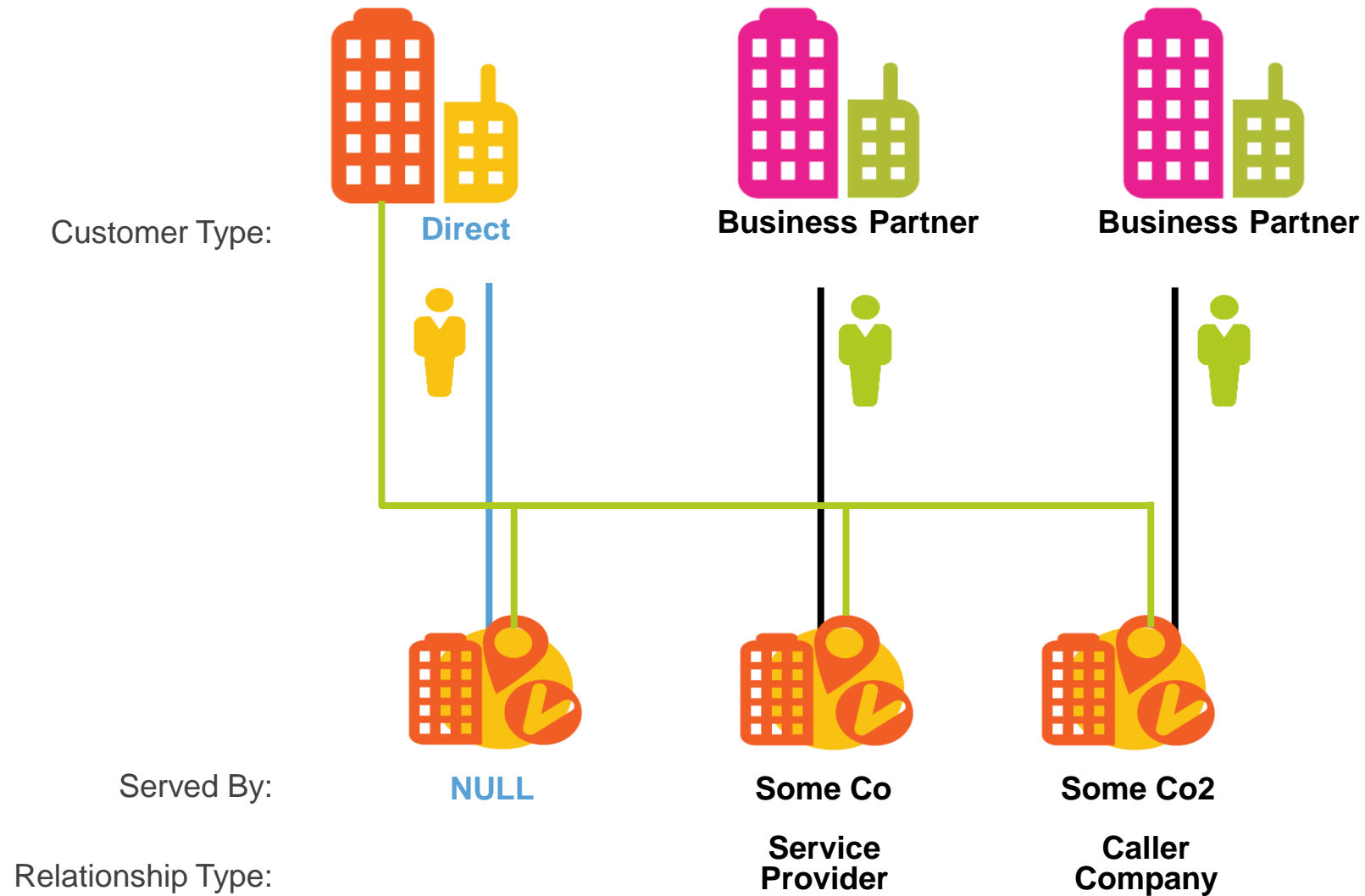
INSTANCE

*accurate &  
intuitive*

The new solution Identifier



# Flexibly Manage Customer Relationships





# Instance in ServiceNow



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≡

Instance  
Airbus integrations, APCO P25 R1.0 (on NR), Namibia



Save



* Name	Airbus integrations, APCO P25 R1.0 (on NR),	
Division	Public Safety	
* Solution	Airbus integrations	
* Version	APCO P25 R1.0 (on NR)	 
UP/SP	-- None --	
* Country	Namibia	
Region	EMEA	
Sub-Region	Israel, Africa & Balkans	
LOB	-- None --	
* Customer Name	STANDARD INSURANCE COMPANY	
Served by Partner	BRITISH TELECOMMUNICATIONS PLC	 
* Relationship Type	Caller Company	
Covered	<input type="checkbox"/>	
Skip Entitlement	<input checked="" type="checkbox"/>	
Justification	Go Baby	
Target Date	2016-12-29 07:08:21	
End Date	2015-12-22 09:50:12	
Oracle ID		
Hosted/Cloud	<input type="checkbox"/>	
On Premise Monitoring	<input type="checkbox"/>	
Status	Active	
Site phase	Production	

# Customer Information in ServiceNow

<

Customer

LOUIS DREYFUS COMMODITIES BRASIL [Case view]

Save

↑

↓

\* Name

LOUIS DREYFUS COMMODITIES BRASIL

Oracle Customer Number

161091

Customer Type

Direct

Dispatch Vendor

☐

Primary Contact

Q

Top Parent Account

☐

Parent

LOUIS DREYFUS HOLDING BV

☐

Priority

☐

TAM

Q

Active

☒

CSAT

Customer List

☐

Address

AVENIDA BRIGADEIRO FARIA LIMA, 1355 - 12

City

SAO PAULO

Zip / Postal code

01452-919

Country

Brazil

☐

Region

Q

Sub-Region

Updated

2015-11-26 04:20:13

Updated by

admin

Oracle Information

▼

DUNS Number

Oracle Status

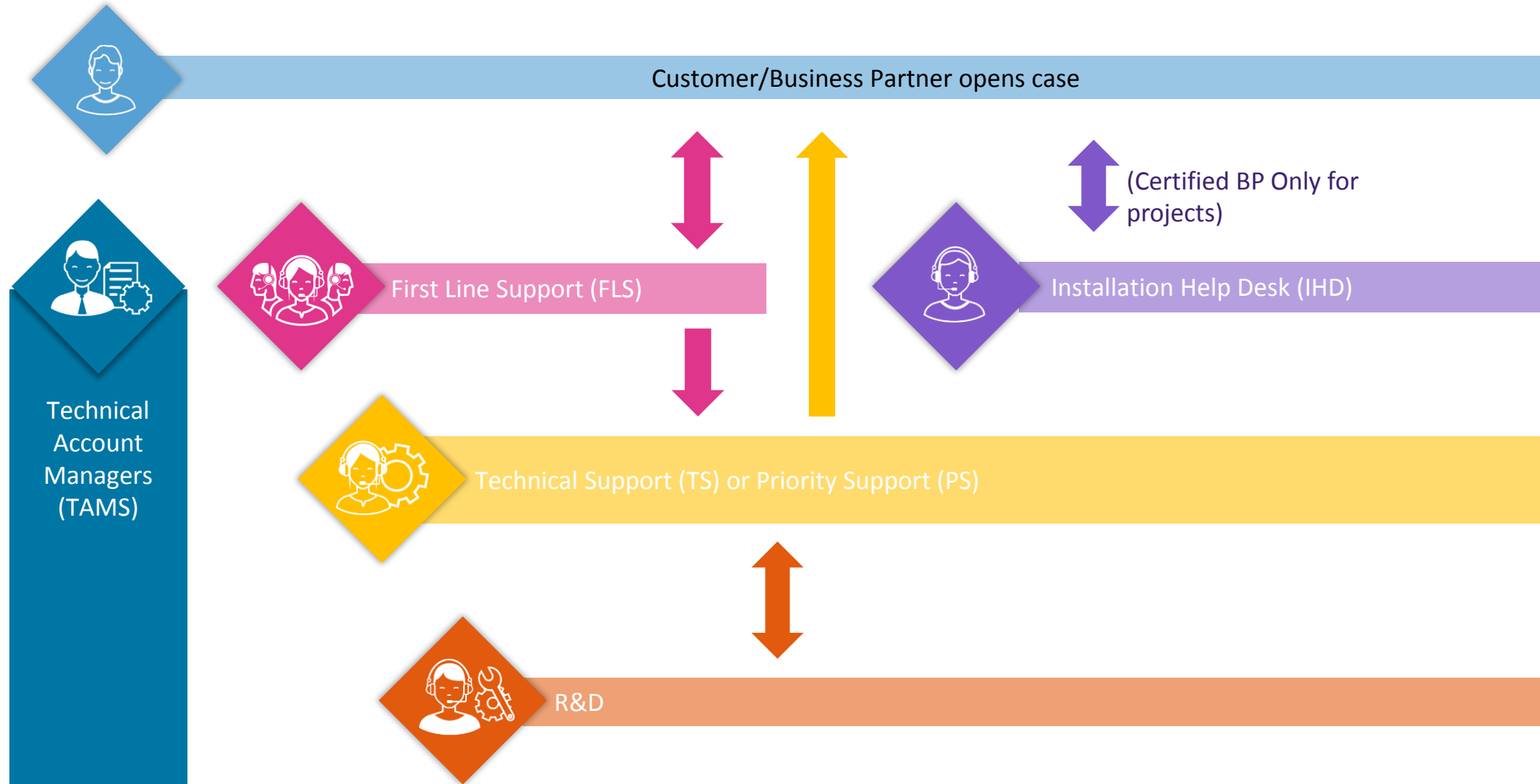
Duplicate of

Created

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# Customer Support Organization and Process



# New Case Ownership Model

**VISION:** Minimize escalation and reassignment

**CONCEPT:** Identify all skills and skill levels required to solve a case during case creation and assign the case appropriately

**IMPLICATIONS:**

1. Minimize basic task management
2. Skills and skill levels are managed in the system for each support engineer
3. Case ownership moves between engineers via reassignment if different skills are needed

# Re-assignment using ServiceNow

The screenshot displays the ServiceNow Case Reassignment interface. At the top, a navigation bar shows the case details: Case CS0001001 [Case view]. The main form is divided into two sections: Case Information and Case Categorization. The Case Information section includes fields for Number (CS0001001), Contact (Tony Morra), Customer (AMERICAN EXPRESS TR), Impact (Medium), Status (Work in Progress), and Crisis Management (unchecked). The Case Categorization section includes fields for Solution (NPM), Instance (NPM, NPM 6.4, United States, Arizona), Functionality (Reports), Version (NPM 6.4), UP/SP, Urgency (Low), Show Internal (unchecked), External/Internal (External), Relationship Type (direct), Served by Partner, and Team Line Director. A 'Reassign Case' dialog box is open in the center, showing the 'Recommended Skills' dropdown, 'Skill Level' (Level 1), and 'Assignment Group' (Global-PIM-Support). The dialog has 'Cancel' and 'OK' buttons. The background form also has a 'Reassign' button in the top right corner.

Case CS0001001 [Case view]

Number CS0001001

\* Contact Tony Morra

\* Customer AMERICAN EXPRESS TR

\* Impact Medium

\* Status Work in Progress

Crisis Management ☐

Assignment group Global-PIM-Support

Owner Markus Schnabel

Reassign Case

Recommended Skills

Skill Level Level 1

Assignment Group Global-PIM-Support

Cancel OK

Case Categorization

\* Solution NPM

\* Instance NPM, NPM 6.4, United States, Arizona

There are 10 cases open for this instance.

\* Functionality Reports

Version NPM 6.4

UP/SP

\* Urgency Low

Show Internal ☐

External/Internal External

Relationship Type direct

Served by Partner

Team Line Director

# Key Capabilities: Deep-Dive



CASE  
MANAGEMENT



SERVICE  
PORTAL

EVENT  
MANAGEMENT  
(NOC)



KNOWLEDGE-  
CENTERED  
SUPPORT



# Customer Portal



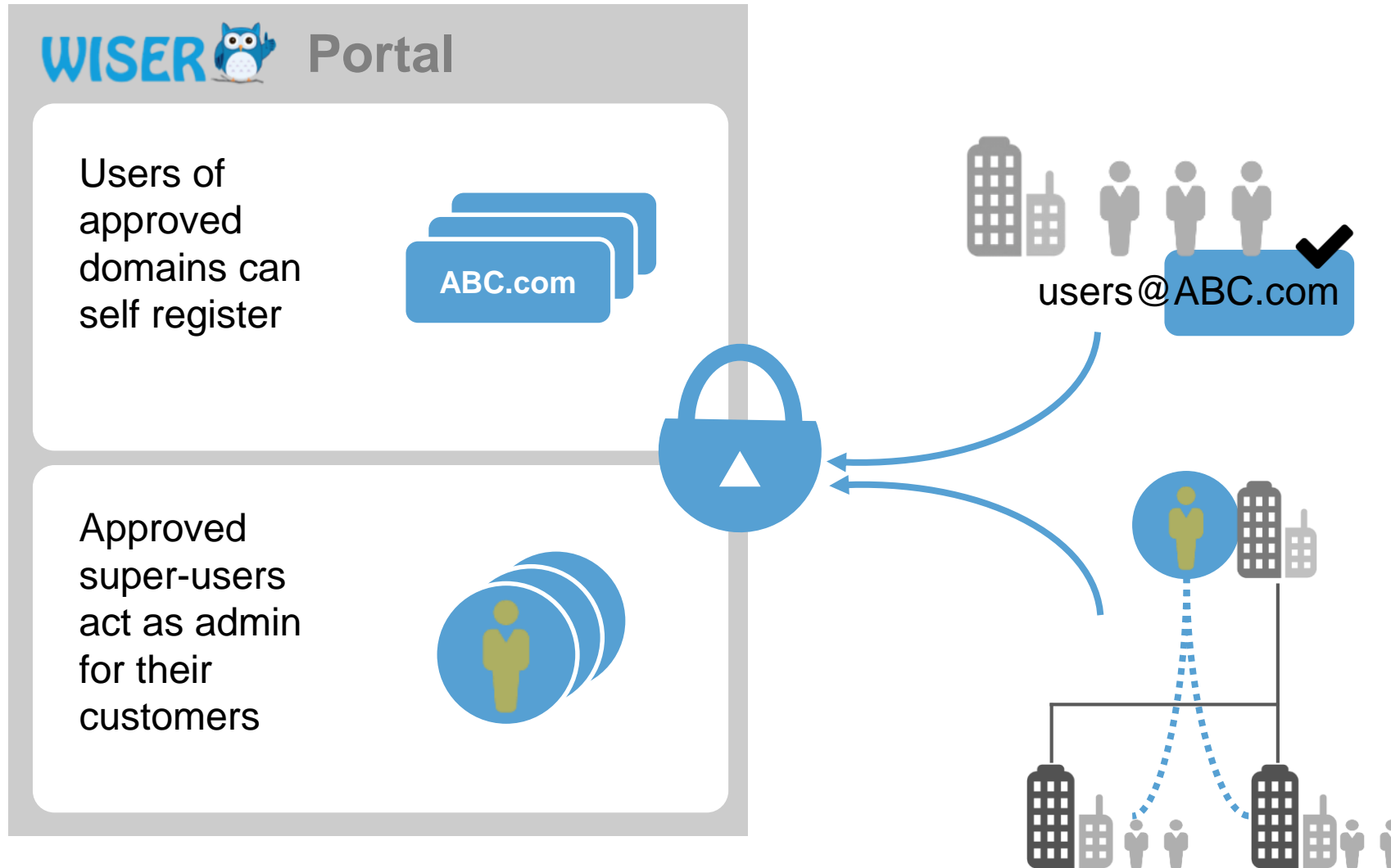
**CUSTOMER  
PORTAL**

Designed for **self-service** and **case deflection**


- Self registration and user management
- Case creation and management
- Service request creation
- Reports access


Knowledge articles display  
integrated with case creation

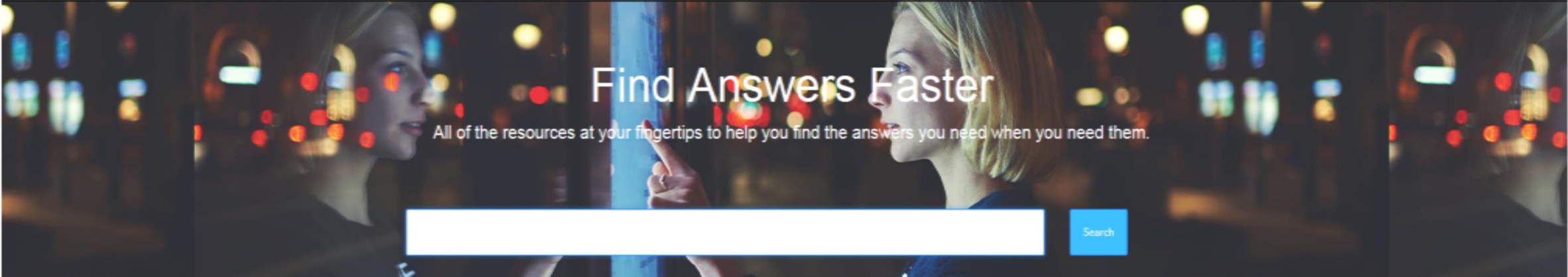
# Self-Service Registration



# Customer Portal Home


Linda Tracy Logout

CREATE CASECASESREQUESTSMY INSTANCESMANAGE USERSNICE SITESHOW TO USE SYSTEM




## Find Answers Faster

All of the resources at your fingertips to help you find the answers you need when you need them.



### KNOWLEDGE

Browse and search for articles, rate or submit feedback.



### SERVICE CATALOG

Service Catalog

### UPDATES

Microsoft has stopped trusting SHA-1 certificate type from Jan 2017. Please check with your IT for further information . At Feb 14th , if an invalid certificate warning pops-up, please contact your IT.



# Key Capabilities: Deep-Dive



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MANAGEMENT



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PORTAL

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(NOC)



KNOWLEDGE-  
CENTERED  
SUPPORT



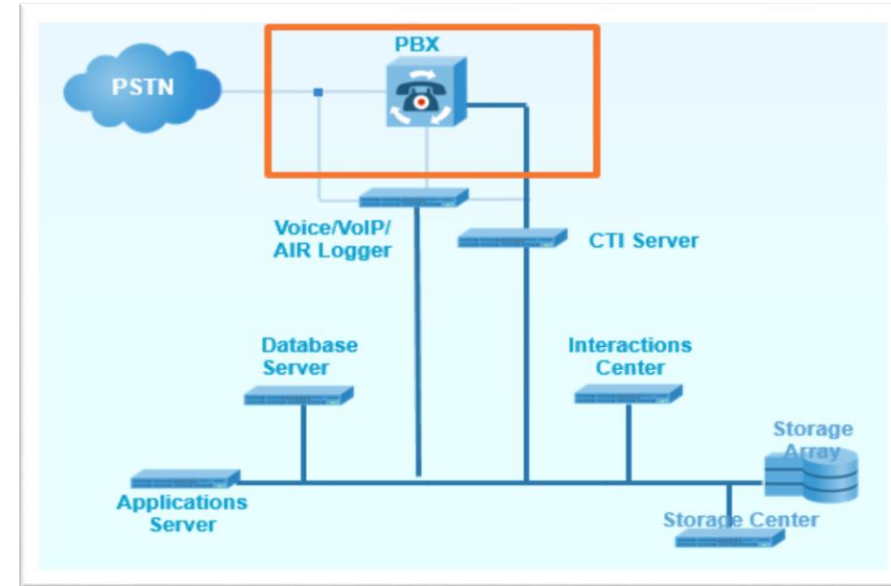
# Leading to Misalignment of Roles



- Customer Support is set up to primarily:
  - Help Customers with “How To” type scenarios
  - Identify and resolve configuration or software issues
- Yet these complex issues require Customer Support to troubleshoot within NICE Software to identify an issue outside of NICE Software
- All this is taking place WHILE the issue is impacting a customer

# The Lightbulb Moment...

- NICE already had a NOC which we used to monitor our hosted infrastructure
- Why don't we direct the NOC to identify issues in our customers' on-premise environments or interfacing systems UPSTREAM BEFORE they manifest in a recording



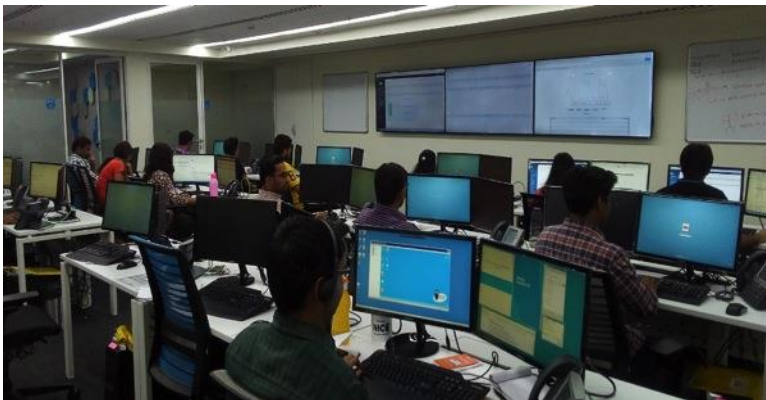
## Benefits

- Identify issues before damage is done
- Immediately identify which party has the problem rather than waiting on NICE Support to troubleshoot downstream in our systems
- Issues that do require NICE Customer Support can be escalated with all the pre-requisite information from the NOC without intervention of the customer

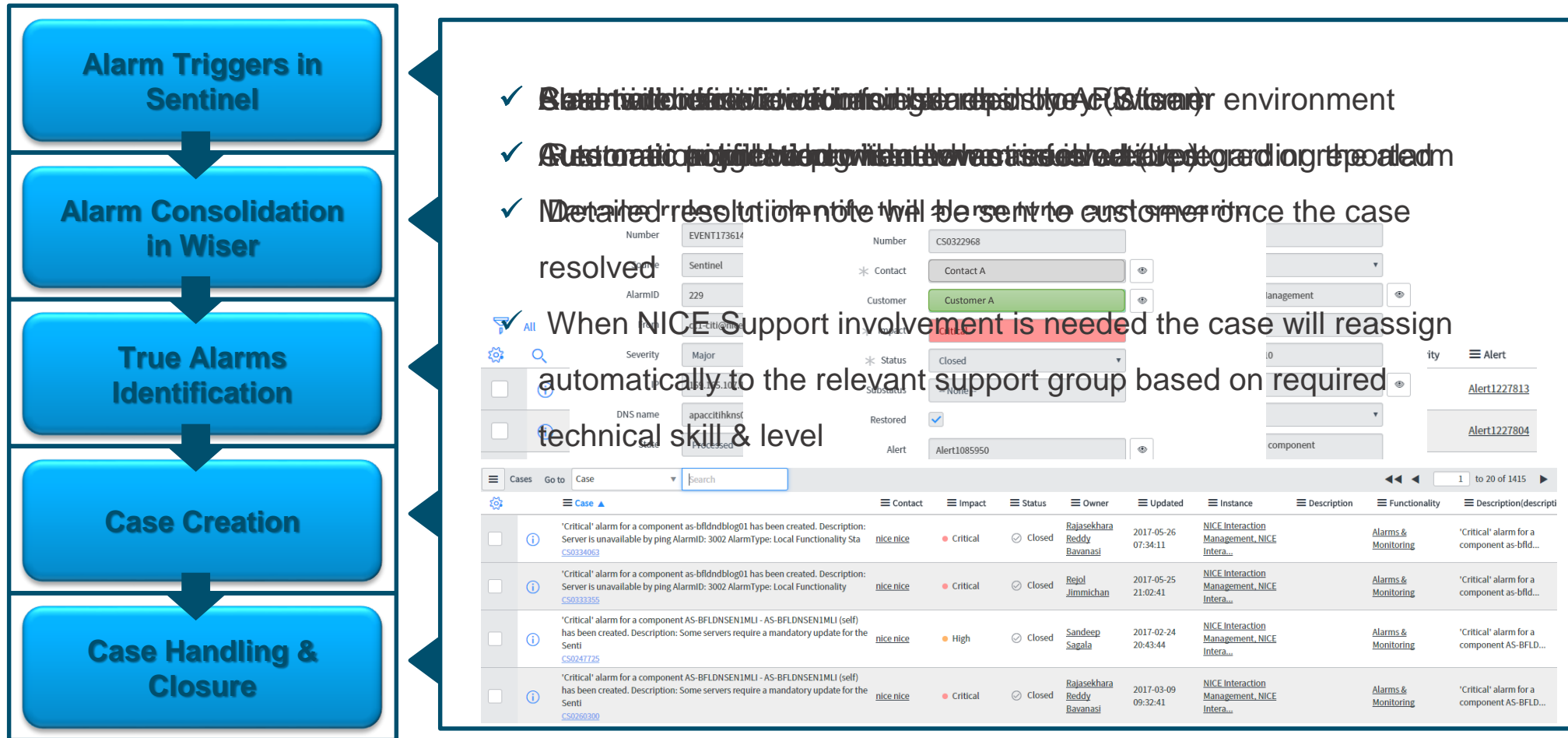
# So We Created Application Performance Services

## APS (NOC) Quick Facts...

- Established 2013
- Fastest growing Value Added Service @ NICE
- 100% Customer retention since establishment
- Two redundant GTC locations in Bangalore & Pune
- 80 engineers (more than 40 with deep recording or telephony experience)
- Round the Clock Monitoring (24/7, 365 days)
- 25 Global Customers – Mostly large international financial institutions with strict compliance requirements
- 2,500 Monitored Servers and Growing
- 50,000 Alerts addressed per Month
- We even do Managed Services for 16 Customer Sites



# APS Response Model





# Key Capabilities: Deep-Dive



CASE  
MANAGEMENT



SERVICE  
PORTAL

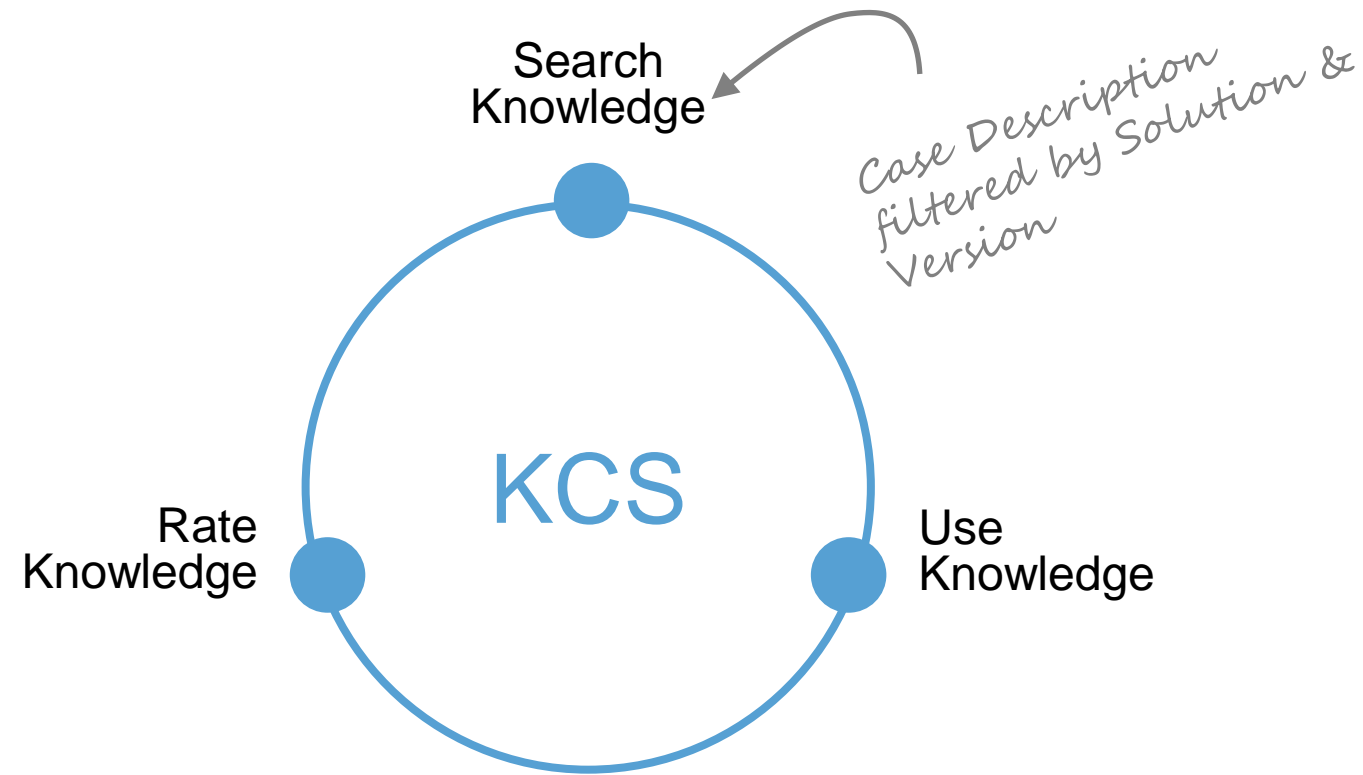
EVENT  
MANAGEMENT  
(NOC)



KNOWLEDGE-  
CENTERED  
SUPPORT



# Knowledge-Centered Support



Faster Case Resolution

Fewer Support Requests from Customers



# KCS-Case Management Integration

## -1-Case Creation

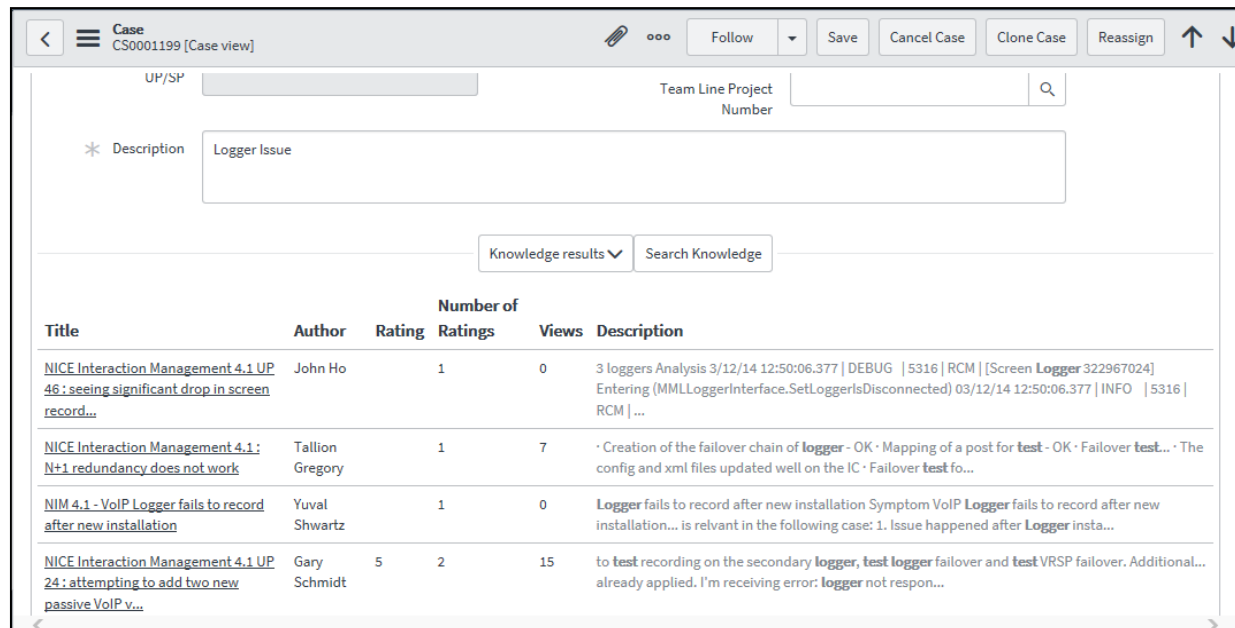
- Auto-search based on solution, version, description
- Retrieval based on relevance and rating

## -2-Case Handling

- RATE RATE RATE!!!
- Rating articles greatly enhances the effectiveness of search results

## -3-Resolution and Closure

- Integrated article creation to case resolution
- Case information is automatically inserted into article
- Enhance articles using knowledge articles creation guidelines to increase relevant retrieval

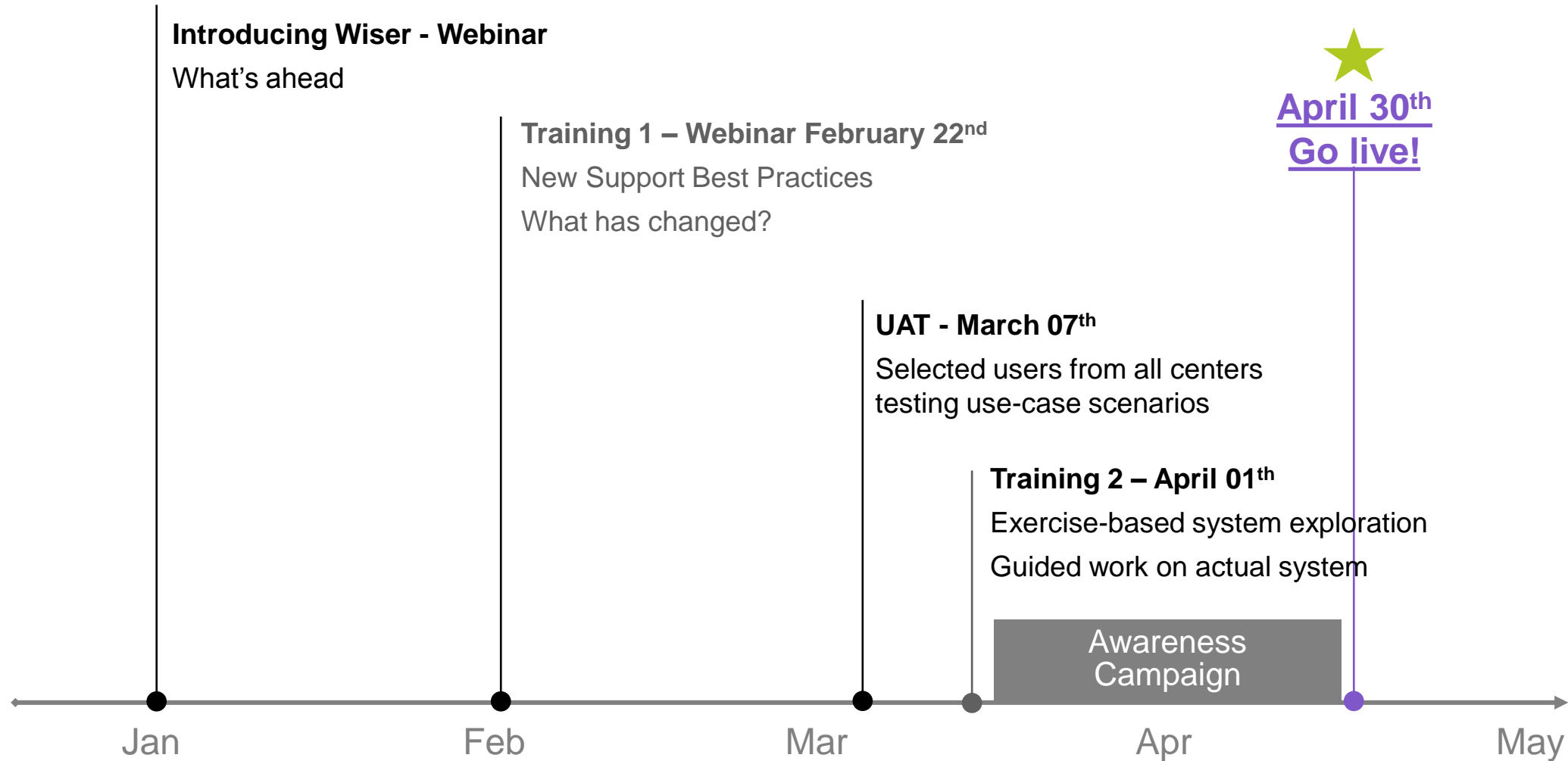


The screenshot displays the NICE Case Management interface. At the top, there's a header bar with navigation icons, a case ID 'CS0001199 [Case view]', and action buttons like 'Follow', 'Save', 'Cancel Case', 'Clone Case', and 'Reassign'. Below the header, there's a form section with fields for 'UP/SP', 'Team Line Project Number', and a 'Description' field containing 'Logger Issue'. A 'Knowledge results' dropdown and a 'Search Knowledge' button are also visible. The main content area features a table with columns: Title, Author, Rating, Number of Ratings, Views, and Description. The table lists four knowledge articles related to NICE Interaction Management 4.1 UP, focusing on logger issues and VoIP recording problems.

Title	Author	Rating	Number of Ratings	Views	Description
<a href="#">NICE Interaction Management 4.1 UP 46: seeing significant drop in screen record...</a>	John Ho	1	0	0	3 loggers Analysis 3/12/14 12:50:06.377   DEBUG   5316   RCM   [Screen Logger 322967024] Entering (MMLLoggerInterface.SetLoggerIsDisconnected) 03/12/14 12:50:06.377   INFO   5316   RCM   ...
<a href="#">NICE Interaction Management 4.1: N+1 redundancy does not work</a>	Tallion Gregory	1	7	7	· Creation of the failover chain of <b>logger</b> - OK · Mapping of a post for <b>test</b> - OK · Failover <b>test</b> ... · The config and xml files updated well on the IC · Failover <b>test</b> fo...
<a href="#">NIM 4.1 - VoIP Logger fails to record after new installation</a>	Yuval Shwartz	1	0	0	<b>Logger</b> fails to record after new installation Symptom VoIP <b>Logger</b> fails to record after new installation... is relevant in the following case: 1. Issue happened after <b>Logger</b> insta...
<a href="#">NICE Interaction Management 4.1 UP 24: attempting to add two new passive VoIP v...</a>	Gary Schmidt	5	2	15	to <b>test</b> recording on the secondary <b>logger</b> , <b>test logger</b> failover and <b>test VRSP</b> failover. Additional... already applied. I'm receiving error: <b>logger</b> not respon...

# PROJECT TIMELINE & CHANGE MANAGEMENT

# Project Timeline



# Internal and External Communications



- New Vision for Support
- Project Plan

## Initial Presentation



- Highlight new processes and process changes
- Emphasis on benefits of changes

## New Processes Communication



## Training Material



- 50+ Short Clips: 1-5 min each
- Integrated into ServiceNow Knowledge Articles
- Exercises on Training Environment



## Customer Communications

# Teaser Videos to Drive Awareness

One clip released each week leading up to the process changes presentation



# Top Three Key Takeaways

1. Skill-based Support Vs. Tier-based Support
2. Enable preventive maintenance using Knowledge-Centered Support
3. Lead the Change Management track of your Business Transformation project