A White Paper

Marketing the
Value of Your Service Desk

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Problems Many Service Desks Face Today

Does your management fail to realize the value your serviced desk or support center is contributing to the enterprise? Do they take the attitude that service desk personnel are just "those people that answer the phone?" Do you find that customers don't appreciate the value you are delivering to their business?

If you answered yes to one or more of these questions, you are probably wondering -- **"How do I market the value of my support more effectively -- to my management, and to my customers?"** You know the support you are providing is absolutely essential to the life of your enterprise, or the profitability of your customers. If you're a service desk manager, you know the support you are providing to departments is in fact the "life blood" of the company – that without your team, departments would be in dire straits. If you're an external support center manager, you know your people solve many critical customer issues on a daily basis, keeping clients using your products at top efficiency. So why don't they realize the value you are providing?

The Real Issue: *How to Market Your Value*

The issues in these all too common situations is NOT that there isn't "value" being delivered – there most certainly is. **What is missing is marketing the value of that support**. <u>As a consequence of not marketing the value of their support effectively</u>, service desk and support center managers experience:

❑ <u>Customers who are …</u>
- Not sure about what is or is not supported, and what to expect
- Unaware of support policies and procedures, and thus may cause the service desk further problems
- Liable to turn elsewhere for support – reducing productivity, increasing costs and diminishing control over technology assets and decisions

❑ <u>Senior management …</u>
- That doesn't appreciate the value support is bringing to the business

❑ <u>Increasing budget pressure during times of cost-cutting</u>
- Little support for proposals and new projects.
- Resources they need to do an effective job are not made available

❑ <u>Diminishing team morale and productivity</u>

This paper will outline a methodology for effectively marketing the value of support. In the course of the discussion we will review what it means to think and act like a "business-within-a-business", provide the key elements of a good business and marketing plan, review essential marketing collateral that will help you communicate your value, and outline the key steps to guide you in effectively marketing the value of your support.

Some Necessary Assumptions

Before you can embark on an effective marketing program, you must ensure that the following prerequisites are satisfied:

❑ Your support services are **designed based on the needs and requirements of your organization and customers.** If the support offerings that you provide miss the mark, your support marketing program will be hard pressed to encourage customers to take advantage of the services!

❑ Your service desk or support center is **resourced, trained** and **equipped to deliver on all the promises you make.** Your credibility will suffer if you attempt to market and promote support which you cannot or do not deliver on.

Why Market the Value of Your Support?

When you accomplish the steps outlined in this paper and begin to successful market the value of your support, you'll start to realize these benefits:

❑ **Higher customer satisfaction**. Achieving high customer satisfaction is due to two key factors: 1) setting accurate expectations, and 2) meeting or exceeding these expectations. When customers are not clear about what your product is, how they use it, and how they benefit, their expectations can vary. This can affect perceptions and thus customer satisfaction.

When you market the value of your support, you are communicating to them in no uncertain terms what they are receiving, how you engage, and the benefits they derive. Customers understand how to use product and technology more effectively. Expectations are set accurately in terms of what you are delivering, and what they should expect (positioning you to meet or exceed these expectations). Finally, customers are informed about support policies and procedures, preventing unnecessary support problems.

❑ **Higher employee satisfaction.** When you effectively market the value of your support, employees in your support center get excited. They know the vision and mission, as well as the value of what they are delivering, and can articulate this. When your staff believes strongly in the value they are delivering they are more motivated – and this positively affects their behavior and job satisfaction.

❑ **Greater Loyalty, Customer Retention.** When you market your support, accurately set expectations, and deliver support that meets or exceeds expectations, your raise customer satisfaction. For service desks, internal customers are happier and more supportive. Better able to accomplish objectives. For external support centers, customers are more productive, more loyal, and more likely to stay with your company. Loyal, satisfied customers are also more likely to refer other clients to your company, generating even more business.

- **Higher levels of maintenance renewals (external support centers).** When customers are reminded of the *value they are receiving* for their support investment, they make a direct connection between the funds they are paying for maintenance and the value they are receiving from your company's product or service. They realize the support is a strong enabler of their Return on Investment (ROI). The result: they are motivated to continue renewing their support agreement, generating valuable revenue to the business.

- **Greater add-on sales for products and services (external support centers).** Higher customer satisfaction and loyalty means that customers stay with you, which inevitably leads to add-on sales for product and services – or even more lucrative migrations to new generation products.

- **Greater support from top management.** Top management is interested in achieving enterprise goals and objectives. A fair number of these have to do with increasing market share of the company product, increasing competitiveness, and boosting product or service sales. Many times executives do not understand – or appreciate – the key role that quality support plays in achieving enterprise objectives.

  Marketing internally helps communicate the difference and impact support makes to your enterprise. They begin to see – through your marketing communications – how the support missions aligns with and supports not only the IT mission, but that of the whole enterprise. How support is a key enabler in achieving enterprise goals and objectives.

  If you're an internal support organization, C level executives begin to understand how support ensures that major roll-outs of new infrastructure go as planned; how support saves costs and ensures efficient operations throughout the organization. They begin to appreciate how quality service desk support is in many ways the "life-blood" of the organization.

  If you're an external support center, top executives begin to realize that support is a strategic asset and critical to company profitability. Many of today's corporations receive a major portion of their revenue stream from on-going maintenance agreements (some as much as 60%). Your marketing communications make it clear to them that quality support plays a major role in maximizing these maintenance renewals. You also demonstrate the link between quality support delivery, achieving high customer satisfaction levels, and increased add-on product and sales purchases. When you deliver quality and market your value effectively, top management begins embracing support as a *corporate ally* in achieving enterprise objectives.

  Of course, to market effectively you have to be delivering results. Your support performance must align with your marketing messages – otherwise customers will expose you. Marketing is never a cover-up for poor performance. On the other hand, when you are delivering what you promise, marketing can pay tremendous dividends.

- **Improved Budget Support.** When executives begin to realize and appreciate the linkage between the support mission, goals and objectives, and operating plan, and the mission and goals of the enterprise, they see more clearly how support contributes to achieving enterprise goals. You become a key enabler, an ally, to your executive staff.

In the case of internal service desks, they see the linkage between the service desk organization and the productive operation of company departments. They see how support enables smooth roll-outs and cost-effective operations and are naturally more receptive to budget requests.

In the case of external support centers, management appreciates how support plays a direct role in maintaining high customer satisfaction, loyalty, and support renewals. Because they see the linkage, they are more receptive to support budget requests that help ensure quality on-going support.
Of course you must think and act like a business when developing, submitting and presenting your budget!

Seven Steps to Marketing the Value of Your Support

1. Begin by thinking like a "business-within-a-business"

In order to optimize your success, you have to begin by having a **"business-within-a-business"** mindset. This means taking the perspective that your service desk (or support center) is a not a department within a corporation or organization, but a …

> *Business entity that has a mission and purpose for existing, products or services to deliver, customers to please, and stakeholders you are accountable to.*

With this mind-set your support is viewed as a "product", your market consists of your "customers" or end-users that have a demand for your support "product", and your mission is to create value -- by minimizing costs, maximizing product productivity, or generating additional revenue to the organization.

❑ **What are the benefits of thinking like "business-within-a-business"?**

- You instinctively develop more customer focus
- You become more results oriented – evaluating initiative and plans in terms of cost/benefit to the business – looking for the return on investment
- You become more enthusiastic, more team oriented
- You become even more concerned about quality – because – hey! – its your business that we're talking about, and everything you do or produce is a reflection on your business
- You automatically become more cost-conscious concerning operations and initiatives, since you are in business to maximize operations and produce the best return on investment
- You are more conscious of the need for efficiency and productivity – because, like a business, you have limited resources and need to make the best of them
- You become more creative and innovative in your planning in order to maximize your business results

❑ **A business orientation automatically facilitates your <u>ability to align</u> with the parent organization. How?**

- A business first must recognize and provide for its <u>key stakeholders</u>. It must provide for certain levels of return, and certain key deliverables. Normally these are owners or shareholders.
- In the case of your support "business", your <u>department head and executive</u> staff are your key stakeholders, and the enterprise business strategy is the one you'll need to align your support strategy and key goals to.

2. Develop a Solid Business Plan for "Your Support Business"

Every successful business has a plan. A one year plan, and probably a three or five year plan. Your business is no different. Thinking like a "business within a business" will give you the proper perspective to develop an effective business plan,

What should be the key elements of your plan? Start your outline with these **Key Elements:**

1. **Mission and Vision**- your vision and mission should be specific to your support organization, but aligned with and in support of the larger enterprise
2. **Strengths, Weaknesses & Opportunities** assessment – in order to establish goals, identify resources, and provide direction, you have to assess where you are – your strengths, weaknesses, and opportunities for improvement
3. **Key goals and objectives** – aligned with the larger enterprise, and in view of your opportunities, these are the chief goals you want to achieve this year (and beyond)
4. **Supporting strategies** - that enable you to reach your objectives. One or more mapped to each goal.
5. **Products and Services** – features and benefits and descriptions of your "support products".
6. **Marketing plan** – describes your target market(s), customer profiles, and how you plan to market your organization and your support products
7. **Resource plan** – outlines the requirements for running your business: human resources, partners, tools, systems
8. **Financial plan** – lists your required budget, plus cost vs. revenue projections
9. **Action Plan** – a list of your actions planned throughout the year, tied back to your key goals and objectives, and in line with your strategies.

Lets review each of these key elements, and what needs to go into each:

❑ **Vision and Mission. If you're in business, you must have <u>a vision and mission</u> – what are they?** What is your purpose for existence? How do you accomplish that purpose? Leading businesses and organizations also have <u>a vision</u> to inspire and guide their employees – and a mission statement that define their purpose, what they do and how they do it. What is your vision and mission?

Characteristics of a Vision Statement:

- Short, concise statement that characterizes the <u>ideal, future state </u>of your organization.

- Values-based rather than goals-based.
- Answers the question "who are you, and what makes you special'.

Example – HDI's Vision statement:

*"To be **the preferred provider** of solutions by **empowering** employees to improve our services and to use state of the art technology to **become the model** for others to emulate."*

Characteristics of a Mission Statement:

- Aligned with the mission of the enterprise or parent organization
- Says who you are, what you do, what you stand for and why you do it
- Best if developed in concert with your team
- Short (2-3 sentences), concise and to the point

Example – HDI's Mission statement:

*HDI's mission is to **lead the customer support profession** worldwide **by setting the standards, establishing certification and training programs, and providing access to industry resources."***

❑ **Strengths, Weaknesses, Opportunities and Threats (SWOT)** – to be successful you must include an assessment of your current strengths, weaknesses and opportunities for improvement. This provides you with the **ability to focus on what's important,** and where you can make the most impact with limited resources available.

- If you do an **annual customer satisfaction survey**, this can provide you with very useful input for your SWOT analysis.

    - Should you put more emphasis on support staff training?
    - Are support programs on target, meeting the needs of customers?
    - Do you need to examine basic support processes to ensure that response time and resolution time performance is meeting expectations?

- Also leverage **employee roundtables** to help identify strong points, weaknesses and opportunities for improvement.

- **Threats** also needed to be included and planned for. Do you have competition for delivering support to your clients? If so, who are those competitors and what are the best strategies to neutralize or disable them?

❑ **Key Goals and Objectives.** As a business you have key goals and objectives, and key strategies, for your support business. What are they? Decide on your key business objectives, then supporting strategies to achieve these objectives.

- Some examples of key objectives …
    - Goal: Eliminate skill gaps in the support staff by year end
    - Goal: Raise the customer maintenance renewal level above 95% by year end
    - Goal: Reduce average resolution time by 10%
    - Goal: Increase general customer satisfaction level with support services by 10%

❑ **Supporting Strategies.** For each of these objectives you should have a strategy that will describe how you will achieve the objective. For example…

Goal: Eliminate skill gaps in the support staff by year end

Strategy: To eliminate skill gaps in our support staff we will develop a 'skills gap training program' that will 1) identify gaps in support training for staff, 2) schedule and cycle staff through a training program optimized to addresses and fill these gaps, 3) validate gaps are filled though a quarterly audit process.

❑ **Products and Services. A business has <u>products</u>. Think of your support as a "product".**

- Do you have one type of support that you provide, or several? (phone, web, or on-site for example). Upgrades/new installations?

- Think about the various <u>types of support services</u> you provide – you'll want to develop descriptions, identify the value of each, and specify features and benefit statements for each in your supporting marketing plan.

❑ **Marketing Plan. If you're a business, you have one or more "target markets", and existing <u>customers</u>. What are the markets you serve?** Who are your "customers" – can you identify them, and their characteristics? You also have a plan, goals and strategies to market to your audiences.

- Do you have different customer 'types'?
- Identify any variations in support needs - do service level requirements needs vary by department or location? (hours of coverage, response time requirements, product support requirements, etc.)
- Make a <u>customer profile</u> part of your support planning, to zero in on needs so you can better target to meet those needs!

❑ **Resource Plan. Businesses have resources and an <u>organizational structure</u> that enables them to achieve their mission, goals and key objectives**. Besides management, team leads and support staff, think about how you will provide for required business <u>functions</u> and resources in your support dept or service desk.

- <u>A development function</u> – like a business, you need to designate someone to plan and develop your support services.
  - When new products arrive, what will they require? More support of the same type? Or a new type of support entirely?
  - Who will plan and prepare support staff and customers for the new products or releases coming?
  - What training needs to be in place? Do tools or systems need to be modified to provide new support services?

- A <u>support marketing function</u> – a resource needs to be identified and charged with marketing your support on an on-gong basis.
  - To provide market intelligence - who are your customers, what do they want, and how should we provide the needed support?
  - To help promote the value of your support
  - Can this be provided by a designated resource in corporate marketing, or will you need to staff this function?

- A Human Resources function – to pay attention to staff needs and development
  - May be outsourced to your personnel dept

- Support Partners. If you are in business you may have partners or subcontractors who help deliver your product. Who are yours?

  - If you're an internal service desk, who are partners / subcontractors your need to help deliver your support? IT Network services? Facilities? The development tools group?
  - If you are an external support center, perhaps you require the help of field support personnel, or company sales consultants
  - Like a business, you need to "buy" and enlist the support of your partners to help ensure the optimal delivery of your support
  - This requires you to draw up service level agreements (SLAs, or contracts) with these support partner entities, to ensure 1) expectations are understood in both directions, 2) quality and timely delivery of supporting services

- Infrastructure support functions (facilities, tools, systems)
  - Much of this may be supplied by company facilities and IT
  - Consider whether you will need to staff this full or part time to augment support supplied.

- Financial support function – understand what your corporate department will provide, and whether or not you may need to augment the support with a resource.

- ❑ **Financial Plan. If you're in business you must have a budget.** A support budget helps you manage and track assets, liabilities, revenue and expenses. As well as report on a regular basis (at least quarterly) net worth and income.

- If you are an external support center, it's not unlikely that you are a profit center. You manage the organization as a business from a financial perspective, and maintenance revenue is probably a major source of income for the organization.
  - Knowing that customers are paying for support tends to automatically make you more "customer centric"
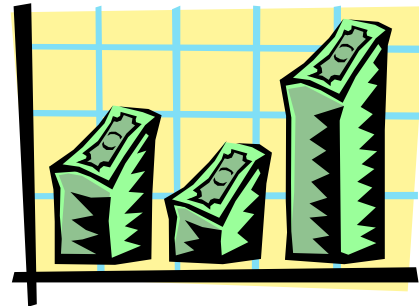
- If you are an internal service desk you are likely a "cost center" and are managing operations to an assigned or negotiated support budget.
  - Taking the view that these funds are allocated tends to encourage the idea that upper management are your constituencies – not the end-user customer!
  - Instead, consider these funds as "temporary" endowments – and your job is to "earn" this revenue just like any other business

- Whether an internal service desk or external support center, you must manage your operations to budget and report/review actual financial performance to targets on a regular basis – monthly, quarterly and annually.
  - Regular financial reporting and review enable you to stay on track from a financial performance perspective
  - Also provides a vehicle to communicate to your department head and executive staff the financial value you are delivering to the enterprise.

❑ **Action Plan.** **Your 'action plan' contains the key actions that you plan to undertake over the course of the year to make your business plan a reality.**

- Identify actions needed to support each of the strategies you see necessary to reach your key goals and objectives
- MAP actions → to strategies → to goals & objectives.
- Lay these out in a time table, so you can visually see the actions you need to accomplish each month, by each quarter end, and by year end.
- ALL actions must have resources identified, target completion dates, and evidence for successful completion of the action listed.

3. Develop a Support Marketing Plan that will Communicate the Value of Your Support!

❑ Of course your business plan includes supporting resource and financial plans, but it is **the Marketing Plan which communicates the value of your support to your target audiences.**

❑ **To be successful, your business plan must be supported by an effective marketing plan.** You may want to collaborate with your marketing and public relations departments in this area – seek out their help early. This does several things:
- It lets them know of your intentions – so they aren't surprised later
- Seeking their advice and input allow them to be positioned as the 'expert' – in most cases they will advise and help in what ever ways possible.
- Later on you may be able to enlist further support from Marketing and PR

❑ **Key elements of your support marketing plan should include:**

- **Brand and Image** – decide on a name and branding for your support center or service desk.
    - A brand helps differentiate your support from competitors or a generic identity.
    - You can start with a name which helps convey value – such as the "CustomerCare Center", or "ServiceLink Support", etc.
    - A logo is permissible, so long as its approved by Marketing and doesn't overshadow your company brand

- **Marketing Goals and Strategies** – while you business plan outlines the goals, objectives and strategies of your support business, your marketing plan focuses on the goals and strategies of your marketing program.
    - Goals should be SMART - Specific, Measurable, Achievable, Realistic, and Time-bound
    - For each goal you should outline strategies that will describe how you plan to achieve the goal
    - What are your marketing goals? Outline these in your plan so you will know what you are aiming to accomplish.

- **Some examples:**
  - Goal: Improve relationships between the service desk and end-users
    - Measurement: customer satisfaction survey
    - Strategy: monthly lunch-time roundtables held in each dept through-out the course of the year; to build familiarity, BIOS with picture placed on the support web site for each of the support staff

  - Goal: Raise the level of customer satisfaction with support by 10% by end of year.
    - Measurement: customer satisfaction survey.
    - Strategy: more accurately set expectations through improved support collateral and customer communications, and meet or exceed those expectations during delivery

  - Goal: Increase customer utilization of support web site by 10% to reduce calls placed for status reporting.
    - Measurement: call tracking system reports and web activity reports – should show inverse correlation
    - Strategy: promote use of support web for status reporting through support web site, monthly eNewsletter, in ad played during 'hold time', and via analyst communications.

- **Target Market Definition** – a description of your customers, including …
  - A listing of the various types of customers your support business serves
  - For each type of customer/department, define …
    - Name, location, employee/staff contacts, contact info
    - Products supported – normal, or are there any exceptions?
    - Any special support requirements in terms of response time, resolution time, service levels

    Example of part of a customer market for an internal service desk:

    Finance department
    - *Employees 14 (List …)*
    - *Location: building 7, 1234 Main St., Ventura, CA 90893*
    - *Contact Info (phone, fax, email, etc..)*
    - *Products supported: normal*
    - *Special support requirements: requires standby support during last 3 days of month for month-end-closing procedures*

- **Key Marketing Messages** – these describe the value of your support and the services you deliver
  - You may want to include a "Tag line" for your support center. This is a short memorable phrase that helps everyone remember the value you are delivering
  - Your Vision and Mission statements are key messages.
    - Remember, these should be aligned with and in support of the Vision and Mission of the enterprise or organization
  - You should have a value proposition in general for your support, and for the key support services your

deliver.
- An "elevator pitch" is often a very useful tool to communicate value across the organization. Characteristics
    - Generally a 1-2 minute presentation that you make to someone about the value of your support center
    - Includes all the key elements in a very brief, concise set of sentences.
    - Who you are
        - What you do
            - The value you bring to the enterprise

- **Competitive Analysis and Strategy** – identify potential competitors to your support services, do a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis for each, and ensure you have a strategy to mitigate their influence.

    - If you are an internal service desk, identify who are the likely competitors to your service desk…
        - Departmental internal sources
        - 3rd party sources
    - If you are an external support center, identify your likely competitors and a strategy to beat them.
    - Even if you believe you have a company mandate behind you, or feel customers are committed, do not assume you have a monopoly – dissatisfied customers will always find (or develop) alternatives. Ensure you are the support provider of choice.

- **Support Environment** – this spells out the requirements for support (the environment or platforms you are assuming), and the products for which you deliver support.

    Example:
    - *Company computer or laptop*
    - *Supported operating systems: Windows 2000, XP*
    - *Supported application products: Word, Excel, company application A, B, C…*

- **Descriptions of Support Products** – **If you're in business, your products are the support services you provide.**

    - What would be the product description for each of your support services?
    - Identify a value proposition for each of your support services – what value does the customer extract from each support service your provide?
    - Identify the key features and benefits that your customers receive when they use your support services

    Example:

    ServiceCenter.com
    - *Our 7 x 24 web portal for ABC Company employees provides a one-stop-shop for all of your support needs.*
    - *From your desktop, anytime day or night, get instant support…*
        - *Timely updates on product revisions, patches and advisories*
        - *Call entry and status reporting – no need to wait until Monday to enter that incident – do it at your convenience and we'll get to work right away and get*

> *back with an answer. Check progress on an incident or add additional*
> *information.*
> - *Answers to Frequently Asked Questions (FAQs) – many questions are answered here without the need for a call. So you're up and on your way faster!*
> - *Scan the same knowledge base our analysts use to find solutions to common problems – we've placed our brains at your disposal, so you can find solutions fast to most issues.*

- *ServiceCenter.com- empowering you through 7 x 24 electronic support so you can get the most from your ABC applications.*

- **Feedback Processes** – in order to know how you are doing (as well as identify strengths, weaknesses, and areas to improve on), you need <u>regular feedback processes.</u>

  - <u>Survey</u> your customers to ascertain needs, expectations and existing level of satisfaction and opportunities for improvement
    - Critical to achieve high levels of customer satisfaction
    - Identifies support your may not need to provide, or support you should be providing and are not
    - What are your good points, bad points? Where are the opportunities to improve? (this is called a SWOT – Strengths, Weaknesses, Opportunities and Threats assessment)

  - Surveys can be done via <u>phone, in person, or via email/web</u>
  - Use these results to
    - Identify and build on strengths
    - Identify weaknesses so that you can organize a plan to address these, and mitigate perceptions in the meantime

    <u>Note: periodic customer satisfaction surveys should be instituted as an on-going process – usually annually.</u>

  - If not already doing, also institute an <u>event-based survey process</u> to measure customer satisfaction regarding incidents on an on-going basis.

- **Marketing Collateral -** to accurately set expectations, and help communicate the value of your support.

  - A crucial part of achieving customer satisfaction is <u>accurately setting customer expectations.</u>
  - If your customers don't know what to expect – in terms of products supported, the support to be delivered, the response time, the resolution time, how can you possibly meet or exceed those expectations? Use marketing collateral to communicate …
    - What your expect
    - What you deliver
    - How you deliver it

  - This will position you to not only meet expectations, but exceed them – and create higher customer satisfaction as a result!

- Support marketing collateral can include some or all of the following:
  - General Brochure or flyer – as a basic piece to promote your core value, key messages, and basic support cervices
  - Brochure or flyer promoting your web support capabilities
  - Customer Support Guide or Catalog
  - Newsletter
  - PowerPoint presentation – to communicate the value of your support internally to staff, to other departments, and to management
  - Case Studies or Testimonials
  - Banner – for events and user group meetings
  - Quick reference card – to assist users with finding contact information, web site addresses, phone numbers, priority codes, etc.
  - ….Plus many other pieces (banners, caps, mugs, screen savers, etc.)

- **On-going Marketing Communications Plan** – marketing the value of your support is all about letting management and customers know how you are performing on an on-going basis.

> *You may have saved the company $50,000 by working through the weekend to ensure a problem was addressed prior to a major roll-out, but unless you report this business value, who will ever know?*
>
> *With all the email and snail mail we receive these days, you have a LOT of competition for mind share. Think carefully about each communications vehicle, and make sure that it will be effective in carrying your message.*

- Be concise, and communicate the value of your support as often and in as many ways as you can - during daily customer support transactions, in company communications, a regular support eNewsletter, in a support web site, and in regular customer/user group meeting events.

What are some ways to continually communicate your value?

1. Market your image in every customer interaction. Whether you realize it or not, your image comes through in every customer transaction. When support analysts greet customers with a bored "Hello, Joe here" – that communicates a lack of interest. How does that reflect on the image of your support center or service desk? What does that say about your professionalism?

- Develop a standard greeting to be used by staff for all of your customer interactions. This will help ensure consistency in the way your image is projected
- Standards for written communications should also be developed and put in place for staff, so that every email transmission can help project your image and professionalism.

- Ensure your service desk analysts are trained and certified in professional <u>customer service delivery</u> – take advantage of HDI certification training!

2. Participate in a Company/Organization Newsletter – if you have an existing company Newsletter (hardcopy/email), determine if you can section off a portion of the Newsletter for support. Depending on the amount of space available, leverage this to deliver major support marketing news

3. Deploy a Support eNewsletter – put a plan together to deliver a monthly, bi-monthly or quarterly newsletter to customers. The newsletter can be drafted on your support web site as a new page added to a "Newsletter Home" page and an email can be sent out to customers to draw them back to the newsletter (and your site) to read up. <u>Regular Features</u> of a Support Newsletter can include:

- *Update on performance and customer sat ratings* of the service desk/support center
- *Success Stories* – celebrate successes – if you have a great story of how one of your staff helped a customer, publish it
- *Support advisories* – proactive notification of common problems and solutions
- *News on product updates* – advising customers on product updates they should have to avoid problems/increase stability
- *New product roll-outs or major releases* – news concerning future major product releases or major roll-outs – how customers can adequately prepare
- *Tips and tricks* – expert advice on how to improve the performance of systems or certain applications
- *Contact information* – always include key contact information, how to place calls, web support address, etc.

4. Launch a <u>support web site</u> to help deliver your support AND market your value!
- Intranet for internal service desks; support web site for external support centers
- Provides an extension of phone support for both internal and external service desks
- Besides being useful for delivering support services (call entry and status reporting, self-help tools, access to a knowledge base), a support web can be useful for <u>marketing the value of your support</u> on an on-going basis:

  - Your <u>key messages</u> can reinforce value to the user every time they visit your support home page
  - Your <u>brochure, flyer and other media</u> can be activated by a click and downloaded so that customers, sales and management can review details on your services
  - <u>Success stories</u> - about how your support center played a major role in a company roll-out, saving thousands of dollars in cost; or for an external support center, how your support helped a company realize improved productivity
  - <u>Live testimonials</u> can be played to testify as to the value of your support
  - <u>Online Support Guides (catalogs)</u> can inform customers regarding support policies and procedures, support services available, help accurately set expectations, and position you to achieve higher customer satisfaction
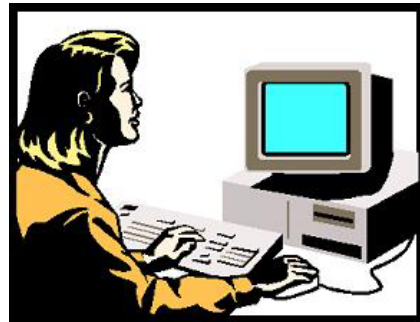
- Important updates or advisories keep your customers proactively informed about timely product and support updates, so they can take steps to avoid problems before they occur
- FAQs and regular technical tips can inform customers about how to use technology most effectively, ultimately reducing the load on the service desk or support center. Tips can include how best to configure platform and applications, security management, and basic trouble-shooting. The goal: help make customers more self-sufficient regarding routine issues, so the service desk can devote resources to more complex, urgent issues.
- Your eNewsletter can be hosted on your support web site, providing a convenient place for customers to locate the current issues, subscribe new users, or search through past archives
- Results of your latest Customer Satisfaction Survey can be posted, informing customers of your performance scores, opportunities for improvement, and further plans to improve

5. Leverage User Group and Customer Events. Events bring support center / service desk staff into direct contact with customers. Key benefits …

- Facilitate the level and quality of communication – issues can be delved into, new opportunities for improvement can be discovered
- Boost customer relationships – customers gain a new appreciation for the staff behind the phone/web, and support staff gain a greater appreciation for the needs of customers
- Act as a forum for delivering updates and receiving feedback on new rollouts, advisories, initiatives, and support issues
  - Types of periodic customer events
    - For an external center, these can be periodic user group meetings.
    - Internal service desks can schedule quarterly roundtable meetings with users.
  - Frequency:
    - External support centers should have (or take part in) at least and annual customer event, augmented by more frequent regional user group meetings
    - Internal centers should participate in an annual company to market their value, and augment this with periodic user group meetings (for depts.)

6. Continually Measure and Report Positive Performance. Remember, customer satisfaction and management support is based on setting expectations accurately, then meeting or exceeding those expectations.
- Assess performance on key support metrics via your events-based survey as well as your annual customer satisfaction survey
- Assess performance on key performance indicators on an on-going basis – weekly, monthly, quarterly and annually
- Other metrics that should be tracked and reported on include:
  - Internal service desks: cost-effectiveness of operations, minimizing costs of major roll-outs, other cost-savings
  - For external support centers: the level of support maintenance renewals, your impact on add-on product and service sales
- Reporting to management should be on a monthly, quarterly and annual basis, in terms of your performance and ROI.

4. Engage Executive and Management Support

❏ **You've assembled your business plan and supporting operational plans, including the all-important marketing plan**

❏ **Next you will need to market your plan to your staff, manager, and various department heads to consolidate support.** For this you will need to create the following collateral to support your efforts:

- A detailed support business plan document, with supporting plans
- An executive PowerPoint presentation
- Sample mockups of collateral / web pages / other material

❏ **For your business and marketing plans to launch and be successful you will need to have the support behind it…**

- **Engage executive and management support**
  - Start by engaging a champion and allies to help promote and fulfill your marketing plan
    - Your manager / director will normally function as your champion to upper management.
    - Also present to an enlist the support of your staff

  - Next: enlist executive support. Your CIO or IT department manager should be your champion to executive level management. You should present to executive management with your manager's support.

- **Engage financial support**
  - Your business plan needs to contain a financial section that includes all resources, tools, systems, and collateral – netting these out to dollar amounts.
  - The financial section should include a timeline through the year which projects costs by month, and compares return (incoming dollars) to offset those costs
    - Costs will include items such as human resource time, collateral expenses, advertising expenses, and supporting infrastructure (web server, other services)
    - Offsetting revenue and other ROI – can be tracking of incoming revenue that would be either a direct result of your marketing efforts, or would be favorably impacted by them. This might include such things as the level of maintenance renewals, add-on sales, service engagements, and customer satisfaction levels.

- **Ensure that resources are assigned (or available)**
  - Within the support organization you will need to have a person designated as a support marketing manager, or at least a person responsible for these activities
  - Your support marketing resource needs to present the proposed business and marketing plan to other departments within the company or organization to enlist cooperation and support.
  - Several departments in your organization will be impacted, and can also lend their cooperation and support if you preview the plan to them and enlist their help…

- The Marketing department- marketing needs to be brought into the support marketing plan as an ally. Depending on their resources, they may be able to help in a number of areas….
  - Graphic design for brochures, flyers, and collateral
  - Assistance with web design and rollout
  - Advisement on support marketing campaign planning

  Review your support marketing plan with the marketing department head and staff, solicit their feedback and cooperation. Pinpoint where you need to work closely together, and especially areas where they may be able to help.

- Public Relations – let your PR person know of the marketing plan so they can advise and support your plan as needed.

Identify key points of contact in each of the affected departments, how they will be impacts, who may be able to help and in what capacity. Factor these results into the Resources section of your Business and Marketing Plans.

5. Put Your Business and Marketing Plan into Action!

❑ **Now that you've got you plans in place, and the resources to make them successful, you're ready to move ahead.**

❑ **Ensure your supporting infrastructure is in place to make good on your deliverables**

- Prior to really kicking in your marketing plan you have to be certain that you are **good to go** on all of your delivery systems.

- Review your business plan to ensure you have all the supporting capabilities and systems in place to deliver

  - Call management and escalation system ready
  - Your support site is designed, built and ready
  - Your policies, procedures, contracts are ready
  - Metrics and feedback systems
  - Staffing is in place and up to par to deliver

❑ **Complete your marketing collateral per your plan**

- Internal collateral – for internal staff, customer admin. Examples include FAQs, sales guides, etc.

- External collateral – customer facing collateral such as brochures, flyers, sales guides, quick reference cards, etc.

❑ **Execute an "internal launch" first**

- Before your go out to customers and market you must ensure that your internal staff and support partners are fully up to speed on your marketing plan, key messages, and collateral.

- Equip your staff and support partners with an orientation, a supply of key collateral, and get them all on the same page.
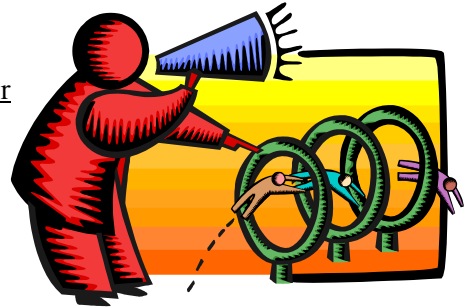
- In the case of an external support center, your sales personnel need to be trained and properly equipped before any customer roll-out.

❑ **Launch your marketing plan and get your message out!**

- Launch your marketing to customers around a significant event or key date. Coordinate multiple activities around this key date **to provide impact.**

- Initiate your survey feedback processes per plan

- Initiate marketing messaging in routine communications through a variety of channels

- Send your collateral package out to customers – this can occur just prior to a key event, such as customer conference or annual meeting
  - This can be a hardcopy package, or email package (or both)
  - Would normally contain some key pieces in the package…
    - Letter of introduction
    - Brochure
    - Perhaps support services catalog

- Engage your support web site to provide a one-stop-shop for you're your marketing messages
  - Your support web is the "communication hub" of your marketing engine – as such, it should be in place and ready to go to support your launch

- Promote the value of your support at a company event; you can feature a booth or customer support area, where you promote support services and engage customers

- Engage your support eNewsletter to customers to build relationships, communicate updates, and market your value

- **Repeat, repeat, repeat** – make it a part of your on-going processes

6. Monitor, Measure and Report Successes to Management and Customers

❑ **In order to be successful you have to be monitoring, measuring, and reporting on a regular basis…**

- Report progress on your business and marketing plan to your dept head and to senior management
- Leverage monthly or quarterly management meetings to promote the value support is generating to the organization
- Recap actual progress against plan, and celebrate successes.
- Highlight measurable improvements in …
  - Customer satisfaction
  - Maintenance renewal trends
  - Cost reductions
  - Productivity gains
  - Effectiveness of new product or release roll-outs
  - Other return on investment

- Highlight HOW support is supporting the achievement of enterprise goals, objectives and key strategies

❑ **Work the business and marketing plan** in accordance with your time-table and action plan

❑ **Adjust course as necessary** – remember your business and marketing plans are "living documents" – so they are subject to adjustments, so long as these changes are reasonable and justifiable.

7. Integrate Your Marketing into Day-to-Day Processes

❑ **Remember – marketing is a CONTINUOUS process.** So integrate support marketing into your everyday business processes.

❑ **Provide regular updates** to your CIO or IT Director on your performance, value and ROI to the enterprise. Offer to present at monthly, quarterly meetings and annual meetings

❑ **Market to your customers on a regular basis**, reminding them of the value they are receiving…
- Leverage your monthly eNewsletter to market continuously
- Open your support center for "tours" to promote your capabilities
  - This can be a real plus for sales people; allow them to arrange for tours
  - For internal service desks, also allow for tours by appointment
  - Key items to employ: a "wall of fame" that displays customer thank you letters, a display of key metrics, illustrating performance that meets /.exceeds goals

❑ **Make your collateral easily available** to staff and customers
- Have a display rack of your collateral in the entry way to your support center
- Make your collateral downloadable in the form of PDFs from your web site
- Ensure new customers get a "Welcome package" that contains key support marketing collateral
  - Internal service desks – this can be part of a new hire package
  - External support centers – a support services package can be part of a new product delivery or support maintenance renewal package

❑ **Market the value of your support internally by integrating it into your new hire training**
- For external support centers, integrate support marketing material and training into your sales training process
- For internal service desks, make support marketing a part of your new hire orientation

❑ **Continuing to use your support web as a marketing vehicle**
- To display your brand, mission, vision and key messages every time someone visits your web site (these should be on your home page, or at least accessible from there)
- To provide easy access to your support services catalog, so customers can easily view policies, procedures and service descriptions

❑ **Leverage events to communicate your value**
- Internal service desks: periodic "roundtables" with users
- External support center: periodic user group meetings or customer events

The Benefits of "Thinking Like a Business" and Marketing the Value of Your Support

Once you are on your way in terms of marketing the value of your support, you'll start to realize key benefits to your support organization:

❑ <u>Higher customer satisfaction</u> – customers will be better informed about what to expect, and how fast to expect it. As a result, your support team will have an easier time meeting or exceeding those expectations. Customers will also be better informed about the value you are delivering, and will be better equipped to make value decision regarding support renewals.

❑ <u>Higher employee and Team Morale</u> - knowing the value they are delivering, your support team will feel better about the support they are delivering. Because expectations are more accurately set, they are in a much better position to meet or exceed expectations. Individual job satisfaction naturally improves, as does team spirit.

❑ <u>Greater customer loyalty and retention</u> – although support is not often a key reason for choosing a particular product or service, it usually is a key reason for staying. Because marketing helps set expectations correctly and communicate the value being delivered, customer satisfaction increases. Customers are less likely to defect to competitors.

❑ <u>Higher levels of support renewals and add-on sales (external centers)</u> – when customers are reminded of the value they are receiving for their support, and the manner in which it supports their business, they can easily justify the funds paid for support. They are also more likely to purchase add-on products and services.

❑ <u>Greater support from executive management</u> – when executive management is informed of how support contributes to accomplishing the key goals and objectives of the enterprise, and they begin to see real results that support this, they begin to appreciate the key role support plays in the business. They become your ally, and a key supporter. They realize that support fulfills a strategic role in the organization. Projects begin to receive more support, support budgets have an easier time getting approved, needed staffing, tools and systems are acquired, employees are more productive, and customers are more pleased. Bottom line – the support business is good for the entire business!

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