



Consortium for
Service Innovation™

SYMANTEC ENTERPRISE SUPPORT – ACKNOWLEDGING AND MAPPING THE SUPPORT NETWORK

Stage One: Discovery

SYMANTEC ENTERPRISE SUPPORT

- The market leader in helping customers secure and manage mission-critical information
- Solutions include endpoint and messaging security; data protection and data loss prevention; policy and compliance management
- Enterprise products generate \$4.2 billion annually, 71% of total revenue

THE CHALLENGE

- Rapidly-growing customer base and product portfolio strains the traditional direct support model
- Must improve the support customer experience while controlling costs

WHAT THEY DID

- Facilitated a workshop that brought together all stakeholders in the support customer experience
- Used value networks and customer-centered design to prioritize scenarios from the customer perspective
- Redirected tens of “in-flight” initiatives into a small number of strategic tasks

THE RESULTS

- A common framework for figuring out what to do, and why
- Recognition of the scope and dynamics of the support experience
- A model to optimize the support network
- Cross-functional buy-in on the highest priorities for the support user experience
- A manageable number of high-value strategic initiatives

HIGHLIGHTING THE SUPPORT EXPERIENCE

Every customer contact is important, but Symantec believes that the post-sales support relationship with their customers is especially important. Research by a leading customer experience consultancy, smith+co, showed that the “Get Help” and “Perceived Value” phases of the customer life-cycle have the highest impact on customer loyalty, and present the highest opportunity for improvement. Accordingly, the support customer experience is a strategic priority for Symantec.

When support organizations want to improve customer experience, they usually focus on direct support—support provided to customers by technical support engineers (TSEs). But this focus is too myopic for Symantec enterprise support. Consider:

- *Self-service sessions initiated directly on Symantec’s website outnumber support cases by a nearly ten-to-one ratio*
- *Customers view user-generated support forum threads over 100 million times per quarter*
- *97% of the support experience is indirect, 3% is with the Symantec Support Center (direct)*

Financially, these trends are great news for Symantec. However, because the vast majority of customer support experiences happen without the involvement of a Symantec employee, improving the customer support experience requires systematic and structural changes. Symantec needed to develop a framework for continuously improving the customer support experience.

PULLING TOGETHER THE RIGHT TEAM

Symantec hired Bradford Smith to lead the customer support experience effort. “Every part of the organization was investing to do the right thing for the customer,” Smith remembers. “But because everyone was focused on their own piece of the puzzle, we weren’t getting the results we expected. We needed to create a coordinated plan we could execute together.”

KEY BENEFITS

Common view of what’s important to customers
Managing cost and improving the customer experience by recognizing support as a network
Cross-functional focus on fewer, higher-impact initiatives

Smith called a summit meeting that included over 50 customer support experience stakeholders: operations managers, product managers, business analysts, user experience experts, and more. The team assembled from around the world into a single room for two-and-a-half days. Even the newly-hired Group Vice President for Support Services stopped by, prior to his official start date, underscoring his support of this initiative.

At the end of the meeting, the team reflected on what made their time together successful:

- *Having the right people physically together, tight travel budgets notwithstanding*
- *Prior to the meeting, each participant completed a survey describing their business needs, pain points, and in-flight customer initiatives*
- *Using a knowledgeable external facilitator*
- *Applying proven techniques like value networks and customer-centered design*

DEFINING PERSONAS

Not all customers are created equal. After agreeing to the workshop’s desired outcomes, the group selected four categories of customers for further investigation. Each customer was represented by a persona with specific goals, wants, limitations, and business needs.

The use of personas kept the design process real. By focusing attention on specifics, the stakeholders were far better able to tap in to their experience, intuition, and empathy to optimize the experience—not generically, but for specific user classes.

ANALYZING VALUE NETWORKS

Verna Allee, the noted business consultant and author, defines a value network as a web of relationships that generates both tangible and intangible value through complex dynamic exchanges among individuals, groups, or organizations. The workshop participants implemented Allee's methodology for mapping value flows between Symantec and each of the selected personas.

The direct output of this exercise was a list of literally hundreds of ways that Symantec and its customers create value for each other. These value exchanges were captured on flip charts then entered into a tool provided by Allee's company, ValueNetworks.com, which allowed the team to visualize and quantitatively analyze value flows.

The indirect effect was profound and immediate: workshop participants were exposed to the tremendous opportunities for Symantec to give and receive value with customers, and they themselves listed the myriad loyalty-building opportunities provided by the Symantec customer support experience. This put them on firm footing to make good decisions about their next actions.

PRIORITIZING TASKS

Each value exchange is an opportunity to help customers and build loyalty. But to determine their next steps, the team needed to prioritize the users' goals.

Facilitator David Kay generalized a technique from customer-centered design, encouraging participants to consider the value flows from each persona's perspective. Which interactions needed to be "zero clicks" away, using web design terminology—that is, what two or three tasks are the most important for users to be able to easily accomplish? Which could be "one click" away? Which others are valuable, but less common or important?

By prioritizing the most important tasks and value flows for each persona, the team was in a position to make informed decisions about what actions to take next.

ORGANIZING AROUND "THE BIG ROCKS"

By analyzing common requirements to improve the prioritized user tasks and value flows, and by enumerating the issues that would block their success, the team determined the four strategic initiatives that would have the highest customer value.

THE ADAPTIVE ORGANIZATION AT WORK

The members of the Consortium for Service Innovation have developed a model called the Adaptive Organization, many principles of which are illustrated by Symantec's customer experience journey. Among them:

- **Customer loyalty and relationship is the differentiator; the customer's support experience is a primary driver in loyalty.** Support organizations must manage their costs, but as smith+co research demonstrates, the customer support experience is first and foremost an opportunity to create profitable customer relationships.
- **Power shift: building from the customer in.** Customer-centered design turns the old paradigm on its head. Rather than forcing customers to navigate company silos, Symantec is breaking down internal boundaries to make things as simple as possible for its users.
- **Using value networks to augment tangible actions with intangible value flows.** We're used to measuring transactions—did we meet our SLA? What is the average time to case closure? But to increase loyalty, companies must also ask, how do our customers feel about us? Mapping intangible flows alongside tangible transactions lets us explore less visible but crucially important loyalty drivers.
- **Changing focus from direct support to the complete customer experience.** The support center is very visible internally—it's expensive and has lots of headcount. But from the customer's perspective, it's the tip of the support iceberg. Most customer support experiences happen outside the support center, which is why the Symantec customer experience framework considers self-service, communities, and even search-engine optimization as well as support center operations.
- **Measuring the right things (not just what's easy to measure.)** Indirect support experiences are hard to measure—how can we prove an issue was resolved in the community, or that a self-service session avoided a case? But, "it is better to light a single candle than to curse the darkness." Even imperfect measures of this crucial conduit for customer support, used to continually improve customer success, are far better than nothing.

These so-called "big rocks" included a common repository for customer data and a common measurement framework. The big rocks became the focus for follow-on activities: instead of managing tens of ad-hoc projects, the team aligned their activities to these strategic issues.

To ensure coordination, the team staffed a governance board for each strategic initiative. And, each team knew the user tasks that were depending on their outputs, so they had a practical means of measuring if they were doing the right things: to the extent the initiatives were going well, the high-priority user tasks and value flows were being enabled.

MEASURING RESULTS

As a follow-on to the customer experience workshop, the team has created a measurement framework for assessing the quality of the support customer experience through all channels, direct or indirect. This framework allows the team to learn where gaps exist in the support experience, and guide them towards ways of filling the gaps.

While customer experience measurement is today as much art as science,

especially in the indirect channels (including self-service and community forums), the Symantec team believes it's more important to measure the important things as well as possible, even if those measurements are imperfect. By attempting to measure and continuously improve the entire support experience, not just support center operations, Symantec has taken steps to build their entire support strategy around the most important stakeholders: **their customers.**

For more information see the Consortium's web site at www.serviceinnovation.org and the white paper "A Demand-based View of Support".

To learn more about the support network and its relevance to your support team, contact:

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This case study was developed for the Consortium for Service Innovation by DB Kay & Associates · www.dbkay.com