Case Study: SBSEG Expert Services

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Overview

In order to achieve our target state vision to transform our overall product support experience to drive delightful personalized global experiences at scale and embrace a tech led approach to our supportability operations, we must think differently to match industry trends while accelerating growth and transformation.

With a unified mission to deliver consistently delightful experiences at scale, the SBSEG Expert Services supportability organization will need to address key challenges, leverage tail winds, and overcome headwinds facing the organization today.

Objective

Transform the supportability operations to significantly improve customer satisfaction, Expert experience, and operational efficiency through a tech-led approach, streamlined processes, and enhanced collaboration with product and technology partners.

Key Results

- **KR1:** Reduce Multi-Contact Rate (MCR) by 25%
- **KR2**: Decrease Time to Resolution for Product Defects by 30%
- **KR3:** Assess Organization and Leadership Approach

Headwinds and Tailwinds

Before diving into key challenges and considerations, we will take a moment to highlight the challenges (headwinds) and favorable conditions (tailwinds) that will be crucial to navigate in order to successfully deliver both near and long term.

Headwinds	Tailwinds
- High MCR - High Escalation Volume - Long TRT (Total Resolution Time) - People & Process Errors - Change management with internal teams	- Team delivery across core functions - Tenure and knowledge of internal team - Appetite to improve the experience - Leadership support - Emerging technical capability (assumption)

Key Challenges and Considerations

The supportability function is a unique one in that it sits between Customer, Experts, and Product. The role it plays is critical to address downstream resolution and influence upstream product fixes. However, it faces two Key Challenges that are limiting the ability to grow in the market and are causing undue customer pain:

1. **High multi-contact rates** - This challenge centers on peak season volume due to high MCR (multi contact rate) for customers, which results in long wait times in Tier2 and a high volume of escalations
2. **Investigations backlog** - There are 700+ Investigations in the current backlog with extended resolution times (30+ days), and incorrectly assigned defect/Product issues. As a result, customer experience is degraded

First, we will explore these two challenges, identify possible areas of friction, and make recommendations to resolve these through people, process, or technology. We will also consider connections between these two challenges that may need to be addressed within a highly matrixed organization. Finally, we will address approaches to organizational assessment and leadership.

High Multi Contact Rates

Repeat contacts erode customer trust, push the expense envelope, and add additional layers of customer friction. The focus here should be two-fold. First, to partner with Tier 1 service delivery teams to identify root cause for escalations and shore up gaps in process or capability. Second, to identify opportunities within Tier 2, prioritize, and solve these. At the end of the day, both of these should be in service to something that can be prevented completely, reduced partially, or leveraged to save the customer relationship.

Near-Term: Tackle the Problem

To tackle high multi-contact rates, we must take a customer-back approach. This centers around listening to the people who are closest to customers and attacking the problem together. A holistic approach includes three areas: (1) Partner Downstream, (2) Own the outcome, and (3) Drive Improvement Upstream.

Partner Downstream

Effecting change and reducing repeat contacts begins by partnering with service delivery teams who first address the customer. To be successful, we should start with simple and clear OKRs that are aligned within Customer Care. e.g. What one thing must be true in order for us to reduce multi-contact rates, and what are the key results we expect to achieve?

Evaluate Root Cause

- Are there themes that can be managed in large chunks? VOC themes and contact drivers in escalated vs. resolved contacts should be analyzed to determine focus areas
- Are there process or training gaps that need to be addressed? Learn from those who do it well.
- Are product teams aware of the severity and impact? Evaluate handoffs between teams to determine where issue are dropped.

Solution Development

- Leverage existing technical capabilities to drive improvements. e.g. GenAI to deliver consistent answers to customers from experts
- Enhancements to Self Help / Self Service for both experts and customers
- Structural changes to product for targeted contact types

Own the Outcome

Supportability teams should be empowered to solve this challenge. Where front line experts are closest to the customer, supportability teams are closest to the experts. It is everyone's responsibility to own the customer experience, but inculcating this mindset into the team to achieve outcomes (in this case, reducing touchpoints for customers) starts within the organization.

Walk in the Customer's Shoes

- Begin with the customer, walk through the expert experience, and evaluate team/org journey maps
- Go broad to narrow, then create KRs that directly impact the outcome. Focus on quarterly with monthly progress toward KRs.
- Look for quick wins that put points on the board, keeping the team engaged

Bold Advocacy for Change and Process

- Advocate for the customer and expert utilizing data and voice to drive change
- Be a change champion to lead by example; own the problem space.
- Prioritize high-impact issues that lead to repeat contacts; align processes across Tier 1 / Tier 2 to ensure a seamless transition and information flow

Drive Improvement Upstream

Synthesize data, learning, and experiments to drive improvements upstream into product. Working closely with Product and Customer Experience teams to present and prioritize issues will help eliminate seams that may currently exist. At the end of the day, both of these should be in service to something that can be prevented completely, reduced partially, or leveraged to save the customer relationship.

It's not about me, it's about we

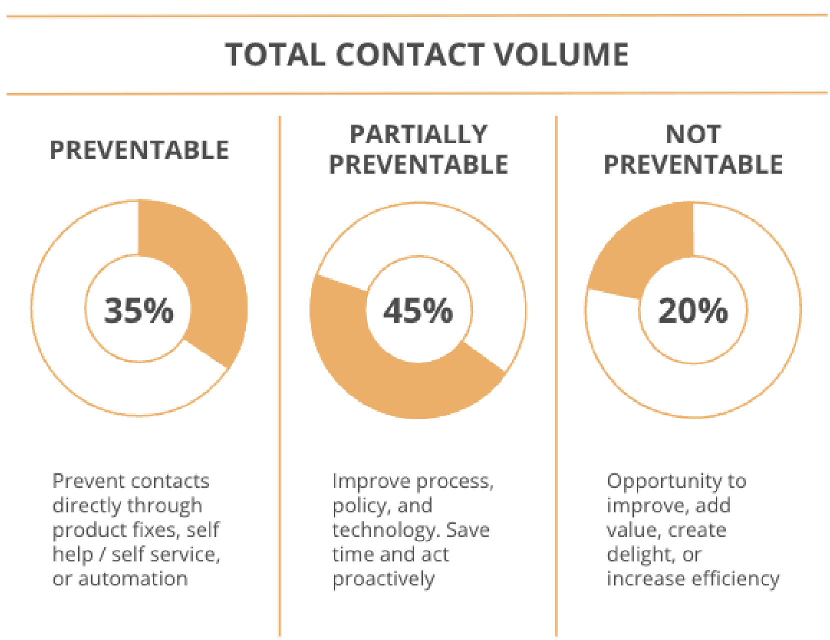
- Build and foster relationships across segment teams to drive change
- Influence decision-making through a Problem-Solution-Payoff story-telling lens
- Keep it simple (OKRs, Issues, Priorities)

Step Change: Establish an Enduring Strategy

Reducing high multi-contact rates is a marathon, not a sprint. Be a pace-setter by establishing a framework and strategy that becomes second nature for the team. In fact, this is required in order to move away from incremental change toward a substantial shift in operations and process.

Framework and Strategy

Develop a practical framework that anyone can use and a strategy that ties it together. To scale Live Services, it will be critical for teams to paddle together at the same course and heading. The goal can be achieved over time with an intentional focus around a strategy that serves to: prevent completely, reduce partially, or repair the customer relationship.



Sample approach to narrow focus

Developing this strategy requires collaboration and buy-in from the team and upstream/downstream stakeholders. To ensure success, it should be anchored to annual priorities and tied to cross-functional input goals.

Investigations Backlog

Catching up on an escalation backlog can feel like an undaunting task to teams, while customers continue to experience pain and eroded trust. At the same time, Product teams are moving with velocity on priority initiatives and likely make trade-offs on current issues that may not be tied to revenue or growth. Here, we explore how to address the large backlog of investigations by looking at the entry points, existing processes for Tier2 supportability, closed loop systems, and upstream partnerships and dependencies.

Address the Problem Space

The same principles apply to identify the root cause and solution the problem. In this case, however, there are likely constraints (perceived or real) which limit the ability to reduce the backlog entirely. With that in mind, we must begin with the Jim Kwik mantra to *"Keep the Most Important Thing, the Most Important Thing."* We must establish the right objective, define the key results, and focus on forward progress.

Identify Areas of Friction

Identify why friction is occurring that is leading to such a backlog. View the problem through the lens of data and voice, then look for simple solutions to a complex problem. It is also important to recognize that Live Services creates a new space that may not be serviced in traditional ways.

Make the complex, simple

- Inventory the Entry points. Define and control these to stop the leaky bucket. Identify the bottlenecks due to staffing or expertise.
- Unwind inefficient journeys and shore up possible inefficiencies in the investigations process
- Priority misalignment and expectation management might eliminate low-hanging fruit. Set expectations for the customer and product teams, and make them realistic using a solid prioritization framework.

Workflow consistency

- If the investigation workflows are inconsistent, make them repeatable and reproducible.
- Inspect, measure, and performance manage outliers (if needed)
- Leverage or enhance existing technology to enable automation (e.g. slack automation / notification)

Close the Loop

A large backlog likely means customers keep asking when their issue will be resolved (contributing to high multi-contact rates). To mitigate this, close the loop with the submitter and customer in the channel they prefer.

Keep them informed

- Customers should receive transparent communication about the status of the investigation
- Employees need to quickly and easily receive updates that are relevant (good and bad)
- Product and CX teams should know when issues spike or meet a certain threshold, and ideally, anticipate them proactively.

Is your feedback mechanism working?

- Establish a feedback loop from customers to Experts to supportability if one doesn't already exist.
- Provide a mechanism to inject feedback into the process for experts to know if it is working

Process Ownership and Communication

If someone doesn't own it, nobody does. To reduce the backlog and get to steady state, clear lines of ownership should be defined and communicated.

Similar to the MCR challenge, this requires collaboration and buy-in from the team and upstream/downstream stakeholders. To ensure success, it should be anchored to annual priorities and tied to cross-functional input goals.

Organizational Assessment and Leadership

This section will shift from WE to ME as I outline my approach to assessing talent, how I influence in highly matrixed organizations, and how I lead.

Talent

Assessing my organization would be a key component to my 30/60/90-day plan. It would begin with assessing and understanding the current state before progressing to the planning and execution phases. A critical early step would be visiting each site to meet with teams in group and one-on-one (O3) settings.

My 30/60/90 approach to assessing the organization

Phase	30 **Learn**	60 **Reflect and plan**	90 **Prioritize and execute**
Objectives	- Understand the current vision, mission, and goals - Assess organizational structure and culture - Begin evaluating current talent capabilities / gaps - Engage team, stakeholders, customers - Review data, key metrics, and deliverables	- Finalize talent capabilities assessment - Identify key talent and leadership needs / gaps - Review work in-flight and assess ability to deliver - Perform structural analysis* to inform strategy - Develop a talent strategy roadmap	- Implement talent strategy roadmap - Establish and communicate group / team OKRs - Prioritize work to be done (start, stop, continue) - Execute priority initiatives - Set teams free to do great work

This table provides an overview of the key steps and goals within each phase of my 30/60/90-day plan

*Organization Structural Analysis

One tool I have found useful is Organizational Structural Analysis. By bringing the team along the journey, it has helped me zero in on *What's Working / Not Working* and *What is Emerging / Drifting*.

Influencing in Matrixed Org

Pillars of influence

To navigate and influence within a matrixed organization I lean on my strengths. The following table illustrates how my personal strengths can be leveraged to enhance my influence within such a pillar of influence.

Pillar of Influence	CliftonStrengths	Description
Relationship Building	**RESPONSIBILITY**	My strong sense of duty and reliability builds trust and credibility, making others more willing to collaborate and support initiatives.
Emotional Intelligence	**BELIEF**	I'm values driven. My core values drive your actions, allowing me to connect with others on a meaningful level, fostering respect and shared purpose.
Expertise and Competence	**MAXIMIZER**	Focusing on strengths and striving for excellence positions me as a go-to person for high-quality work and innovative solutions.

Communication	CONNECTEDNESS	My understanding of how things are interconnected enhances my ability to communicate complex ideas clearly and persuasively, making it easier to align others with a shared vision.
Visibility and Presence	RELATOR	Building deep, genuine relationships gives me a solid network and presence within the organization, enabling me to influence more effectively through personal connections.

Leading and Engaging My Team

Here is an overview of my style and leadership principles. To manage my team effectively, I apply these during Weekly O3s, Staff Meetings, Site Visits, and peers.