

**Reduce Escalations,  
Improve CSAT &  
Increase Productivity**

**SupportLogic**



# What is the purpose of this document?

1. **Outline a standard process for a customer to achieve results with SupportLogic during the first 3 - 6 months after go live is completed or to refresh adoption**
2. **Set Expectations with Customers on what is needed to ensure the success of the program**

## Who is this for?

1. **Primary Users - Support Managers, Escalation Managers, and Swarm Leads**
2. **Leadership**



# Agenda

- SupportLogic Success Plan
- The 4 step Workflow
- Resources



# Success Plan for Support Leaders



# Success Plan

**Achieving results in SupportLogic's SX Platform is contingent on performing a prescribed workflow in the application on a daily basis**

**Workflows are performed by Support Managers, Escalation Managers, and/or Swarm Leads depending on the structure of your teams**

**Achievement is contingent on Accountability**

*\*Assumes business as usual and we must account for seasonal variation in your escalation rates*



# What results should we expect?

1. Escalation Rate reduction of 20 - 50% over 3 month period\*
2. Improved overall CSAT scores and reduced variance of CSAT
3. Productivity gains of up to an hour per day for each support manager

## Why these results?

*These are what other customers have achieved by following the 4 step prescribed workflow*

*\*Assumes business as usual and we must account for seasonal variation in your escalation rates*



## The 4 step prescribed Workflow



# SupportLogic Core Concepts

The videos below are designed to acquaint you with how the machine learning engine works in SupportLogic and highlight the advantages our Sentiment and Attention detection provides.

Invest just 15 minutes of your time to understand the core concepts in SupportLogic so you can be productive immediately.

**Initial Viewing - Review the 5 videos on our Help Center**

**<https://supportlogic.freshdesk.com/support/solutions/articles/73000564923-supportlogic-onboarding-core-concepts>**





# The 4 step prescribed Workflow



# The prescribed workflow

1. Take action on all cases in the console that contain *inbound* Needs Attention and Negative signals
2. Take action on all Escalation Predictions, Escalations Requests, and Active Escalations
3. Take action on Alerts so that you can stay up to date throughout the day
4. Take action on backlog based on the list views in SupportLogic (time permitting)

***Time commitment is 20 minutes twice per day plus engaging on alerts as they are received***

*\*Prerequisite - Must have created global filter for your team to use in the prescribed workflow*



# What do we mean by *Take Action*?

**Support Organizations have standard operating procedures for handling troubled cases such as but not limited to the following**

- 1. Respond to the customer**
- 2. Add an internal case note with relevant instructions for the case owner**
- 3. Escalate the case to next Tier (if you are on a tiered model)**
- 4. Initiate a swarm on the case with relevant subject matter experts**
- 5. Engage the CSM or AM if needed to get ahead of a potential escalation**

**SupportLogic is an early warning system and should act as a force multiplier for your existing processes**



# Step 1

***Take action on all cases in the console that contain inbound Needs Attention and Negative signals***

## **Why Needs Attention and Negative Signals?**

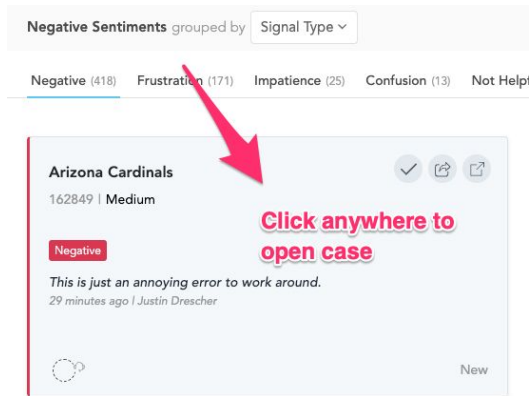
**These signals represent the voice of the customer expressing a perception that their issues or concerns are not being addressed**

## **What should I do with these cases?**

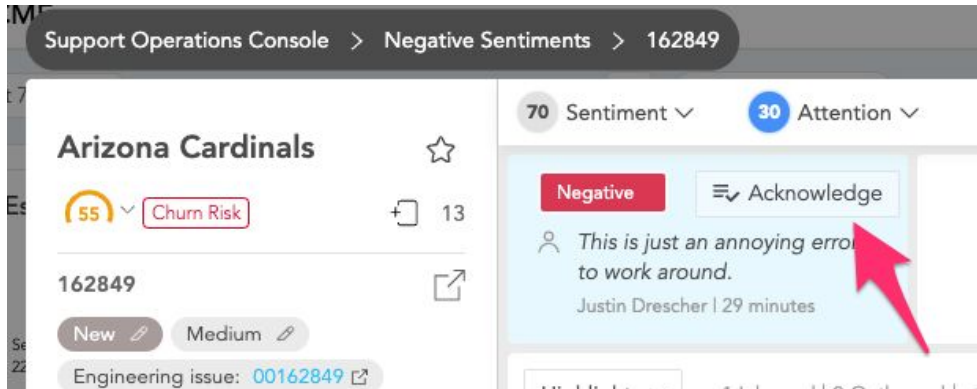
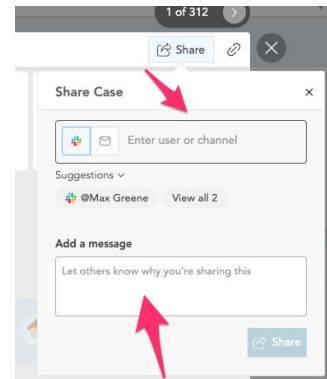
**Take steps to prioritize the cases as needed to drive an improved outcome for the customer**

*\*Must acknowledge Sentiment Signals on the cases for accountability*

# Review Case - Console



1. Open case from Console
2. Review and share case
3. Acknowledge Sentiment for accountability



\*More details on the Console can be found [here](#)



# Step 2

***Take action on all Escalation Predictions, Escalations Requests, and Active Escalations***

## **Why Escalation Predictions and Escalation Requests?**

**Escalation Predictions are cases that are at risk due to similarities to other escalations from your past.**

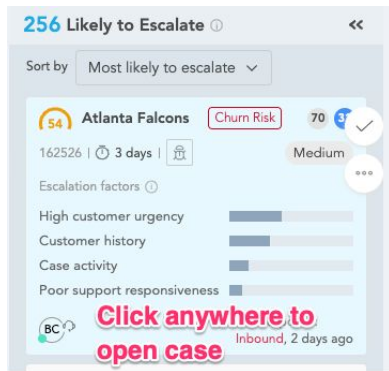
**Escalation Requests are cases where the customer has specifically asked for an escalation.**

## **What should I do with these cases?**

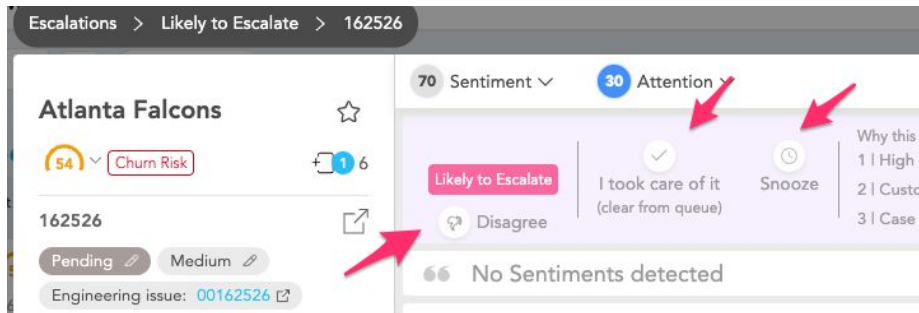
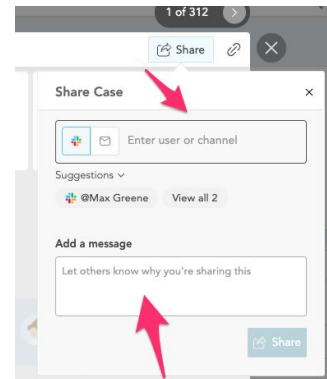
**Take steps to prioritize the cases as needed to drive an improved outcome for the customer**

*\*Must acknowledge, snooze, or dismiss predictions for accountability*

# Review Case - Escalations



1. Open case from Escalations page
2. Review and share case as needed
3. Acknowledge Snooze or Dismiss for accountability



\*More details on Escalations can be found [here](#)



# Step 3

*Take action on alerts to stay up to date throughout your day*

**What alerts should I configure?**

**Alert me when a negative or needs attention signal is detected on an inbound comment for any case that falls under my purview**

**What should I do with these cases?**

**Take steps to prioritize the cases as needed to drive an improved outcome for the customer**







# Among All the Alerts...


What do successful customers focus most on?

- ☐ Follow-up
- ☐ Frustrated
- ☐ Negative
- ☐ Confusion
- ☐ Lack of Progress
- ☐ Churn Risk
- ☐ Likely to Escalate
- ☐ Call Request

# Alert #1 - Configuration



Negative Signals Detected on my Team's Cases 

Trigger when  of the conditions below are met: 

1  Sentiments:

Negative OR Profanity OR Frustration OR Confusion OR Not Helpful OR  
Customer Waiting OR Impatience OR Escalation Request OR Churn Risk OR  
Critical Issue OR Urgency OR Follow-Up Request OR Call Request


↔ Message Type:


2   My Team

1. Go to My Alerts
2. Select + New Alert
3. Add all Negative and Needs Attention Signals
4. Add Message Type - Inbound
5. Add your Virtual Team or other relevant filter



\*Detailed instructions on creating alerts can be found [here](#)

# Alert # 2 - Configuration

Escalation Predictions on my Team's Cases 

Trigger when  of the conditions below are met: 

1

2   My Team

1. Go to My Alerts
2. Select + New Alert
3. Add Likely to Escalate
4. Add your Virtual Team or other relevant filter

*\*Detailed instructions on creating alerts can be found [here](#)*



# Step 4

*Take action on backlog based on the list views in SupportLogic (time permitting)*

**Which list views should I use?**

**We recommend starting with cases sorted by the lowest Sentiment Scores and highest Needs Attention Score**

**After that you can move on to cases pending reply from your team and aging cases**

**What should I do with these cases?**

**Take steps to prioritize the cases as needed to drive an improved outcome for the customer**

# Review Backlog

1,230 Cases | 83 Agents | 32 Customers 🔍 Add a filter

### Sentiment Score

Sorted by 📊 Sentiment Score

**Los Angeles Chargers**  
160709 | One more buffer overflow in mc's vls code  
Medium Escalated 🔴 SLA Missed! 👤 JH

**Indianapolis Colts**  
161670 | AIC-7xxx "probably out of disk space" false report  
Medium Escalated 🔴 SLA Missed! 👤 ML

**Atlanta Falcons**  
161966 | man-pages-fr are out of date  
Medium Escalated 🔴 SLA Missed! 👤 KB

**Buffalo Bills**  
162216 | man-pages-fr are out of date  
Medium Escalated 🔴 SLA Missed! 👤 WC

**Atlanta Falcons**  
162522 | HWCERT: Hewlett-Packard cx2600  
Medium Escalated 🔴 SLA Missed! 👤

**Atlanta Falcons**  
162652 | expect in tcltk-8.3.1-53 doesn't work right.  
High Escalated 🔴 SLA Missed! 👤 JB

**Atlanta Falcons**  
162759 | in some fonts, all characters are rendered as dotte...  
Medium 🔴 SLA Missed! 👤

### Attention Score

Sorted by 📊 Attention Score

**Atlanta Falcons**  
163376 | i810 driver fails to refresh screen properly  
Medium Escalation Request! 🔴 SLA Missed! 👤 SL

**Los Angeles Chargers**  
163343 | Problem with nntp-service  
High Escalated 🔴 SLA Missed! 👤 CB

**Arizona Cardinals**  
163280 | Huge performance drop with ucd-snmp-4.2.4.pre3...  
Medium Escalated 🔴 SLA Missed! 👤 AD

**Baltimore Ravens**  
163278 | kernel dies on loading yenta module  
Medium Escalated 🔴 SLA Missed! 👤 KI

**Chicago Bears**  
163221 | error messages when starting xmms  
Medium Escalated 🔴 SLA Missed! 👤 BC

**Buffalo Bills**  
163219 | Flyspell broken in emacs 21.3-5  
Medium Escalated 🔴 SLA Missed! 👤 NY

**Baltimore Ravens**  
163292 | emacs segfaults every time  
Medium 🔴 SLA Missed! 👤

### Case Age

Sorted by 📊 Case Open Time

**Atlanta Falcons**  
163395 | kde preferences menu is not populated properly  
Medium 🔴 SLA | 3 hours 🕒

**Arizona Cardinals**  
163394 | 7.1 Update Pack halts with Bugzilla message  
Medium 🔴 SLA | 2 hours 🕒

**Baltimore Ravens**  
163393 | Mode\_switch assigned both mod1 and mod3. [Wa...  
Medium 🔴 SLA | 2 hours 🕒

**Atlanta Falcons**  
163392 | c.a.kernel.Group#getContainedParties is broken si...  
Medium 🔴 SLA | 2 hours 🕒

**Arizona Cardinals**  
163391 | NTP cannot keep clock in sync on HP DL385-type ...  
High Escalated 🔴 SLA | an hour 🕒

**Buffalo Bills**  
163390 | sconfig causes "Red Hat Ready" kickstart to reboo...  
Medium 🔴 SLA | an hour 🕒

**Baltimore Ravens**  
163389 | Missing HellaPlayer and openoffice.org sub-packa...  
Medium 🔴 SLA | an hour 🕒

### Unreplied Cases

Sorted by 📊 Unreplied Case

**Atlanta Falcons**  
163395 | kde preferences menu is not populated properly  
Medium 🔴 SLA | 2 hours 🕒

**Arizona Cardinals**  
163394 | 7.1 Update Pack halts with Bugzilla message  
Medium 🔴 SLA | 2 hours 🕒

**Baltimore Ravens**  
163393 | Mode\_switch assigned both mod1 and mod3. [Wa...  
Medium 🔴 SLA | 2 hours 🕒

**Atlanta Falcons**  
163392 | c.a.kernel.Group#getContainedParties is broken si...  
Medium 🔴 SLA | 2 hours 🕒

**Arizona Cardinals**  
163391 | NTP cannot keep clock in sync on HP DL385-type ...  
High Escalated 🔴 SLA | an hour 🕒

**Buffalo Bills**  
163390 | sconfig causes "Red Hat Ready" kickstart to reboo...  
Medium 🔴 SLA | an hour 🕒

**Baltimore Ravens**  
163389 | Missing HellaPlayer and openoffice.org sub-packa...  
Medium 🔴 SLA | an hour 🕒

1. Open Backlog Page
2. Configure Recommended Lists
3. Review Cases and take action as needed

\*More details on configuring Backlog Lists can be found [here](#)



# How much time will this take?

*Time commitment is 20 minutes twice per day plus addressing alerts that you receive*

**When should I perform the workflows?**

**The workflow should be performed at the start of your day to achieve the best results.**

**It should be performed a second time in the middle of your shift to review any new signals and backlog.**

**How can 20 minutes twice a day be enough time?**

**SupportLogic prioritizes cases for you based on risk factors so you don't have to read them all**



# Common Questions

## **Why is it important to acknowledge and action signals or escalation predictions?**

*Accountability. "I am aware of this case and I am responsible for its outcome"*

## **Why only 20-40 minutes a day?**

*This is approximately the amount of time needed to review the cases highlighted in SupportLogic. Additional work may be needed to drive an improved outcome on the case.*

## **Are there any additional results I may achieve via these steps?**

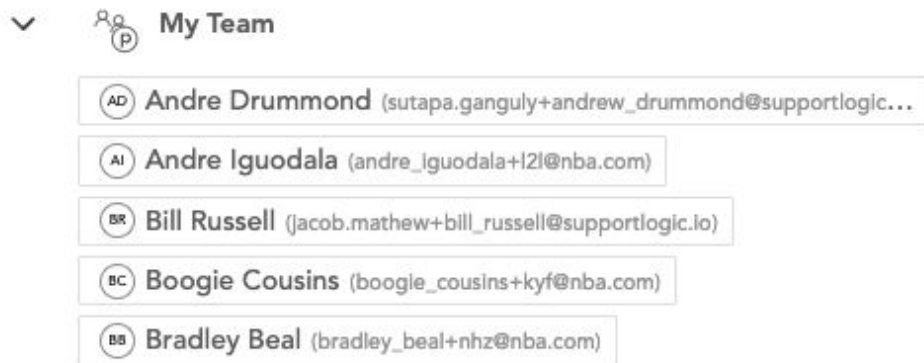
*Being proactive on cases based on Signals can also prevent churn among your customers*



# Resources




# Create your Virtual Team



1. Go to Virtual Teams
2. Select Create Virtual Teams
3. Name your Team
4. Add your Agents
5. Save your Team

*\*Detailed instructions on creating virtual teams can be found [here](#)*

# Create your Global Filter

My Team 


Case Fields Customers Agents


Please select the case field values that you would like to include to your scope preset



Case Fields

US West

Filter >

☒  US West (8287 cases)

Selected Values 1 selected 

 US West 

Cancel Save changes

1. Name your Filter
2. Select your Team
3. Save the Filter

*\*You may create global filters using fields as well depending on your needs*

*\*Detailed instructions on creating global filters can be found [here](#)*



# Resources

[Support Manager Workflow Instructions](#) - *Step by Step guide for SupportManagers*

[Support Manager Workflow Video](#) - *Video Guide for Support Managers*

[Alerts Configuration Instructions](#) - *Key Alerts to Configure*

[Global Filter Configuration](#) - *Configuring the Global Filter to view your Cases*

[SupportLogic Help Center](#) - *General SupportLogic Resources*



Thank you!