Web Support <u>First</u>
Motivating Customers to use Web Support

Andy Westlund

North America Support Director

Mentor Graphics Corporation

Support Centre Showcase
Sydney, Australia
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Introductions

- **Mentor Graphics Corporation**
  - A technology leader in <u>E</u>lectronic <u>D</u>esign <u>A</u>utomation solutions
  - Established in 1981; today 4100 employees worldwide
  - 2006 revenue: $791M; Support Revenue: $275M

- **500+ support professionals in 14 countries worldwide**
  - Service Capability & Performance (SCP) certified

Meet Andy Westlund

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│        Tom Floodeen         │
│  Customer Support Division  │
│   Vice President / GM       │
└─────────────────────────────┘
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     ┌────┴──────────────────────┐
     │      Andy Westlund        │
     │   North America Support   │
     │        Director           │
     └───────────────────────────┘
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STAR AWARD
SERVICE EXCELLENCE
HALL OF FAME

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Andy Westlund
North America Support Director

- **Mentor Graphics History**
  - 1988 - 1992: Software Development (print/plot)
  - 1992 - 1995: Customer Support (print/plot)
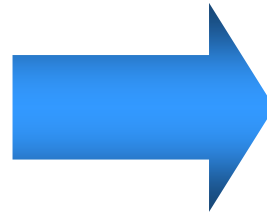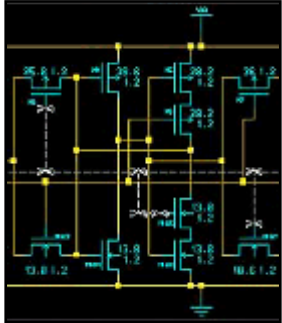 - 1995 - present: Customer Support Management

- **Education**
  - BSCS: Oregon State University
  - MBA: Portland State University

- **Personal**
  - Married, two college-age sons
  - Home near Portland, OR, USA
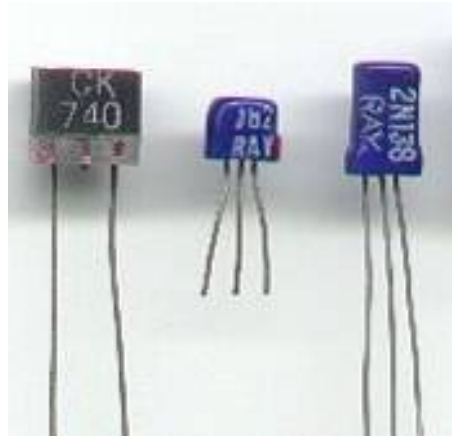
What is Electronic Design Automation?

Turning Ideas into Products...
Better, Cheaper, Faster
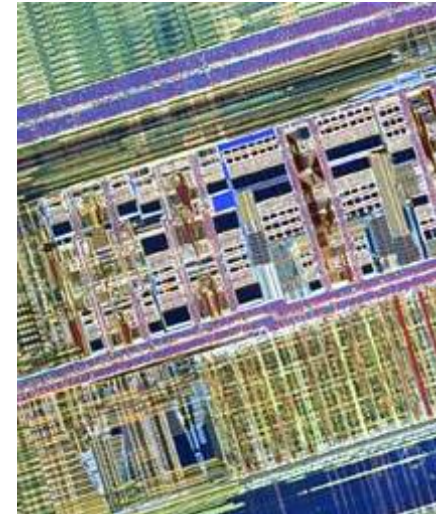
Smaller Size, Increasing Complexity

1930s **1950s** **1970s** **1990s**

"The number of transistors on an integrated circuit doubles every 18 – 24 months"

- Moore's Law

MentorGraphics®

Customer Support Division (CSD)

■ **Vision**

– Remain the Services leader in solving our customers' design problems any time, anywhere
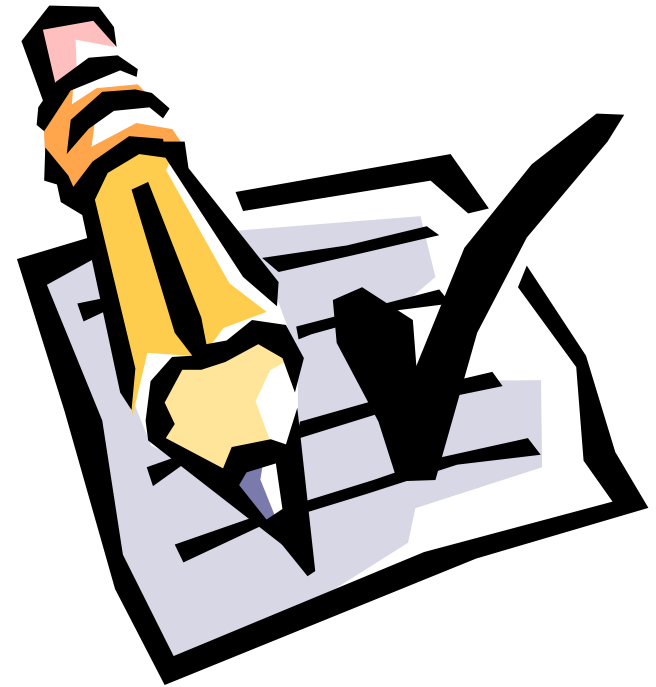
■ **Mission**

– Eliminate the barriers between our customers and our technology

– Strengthen Support as a competitive differentiator for Mentor Graphics

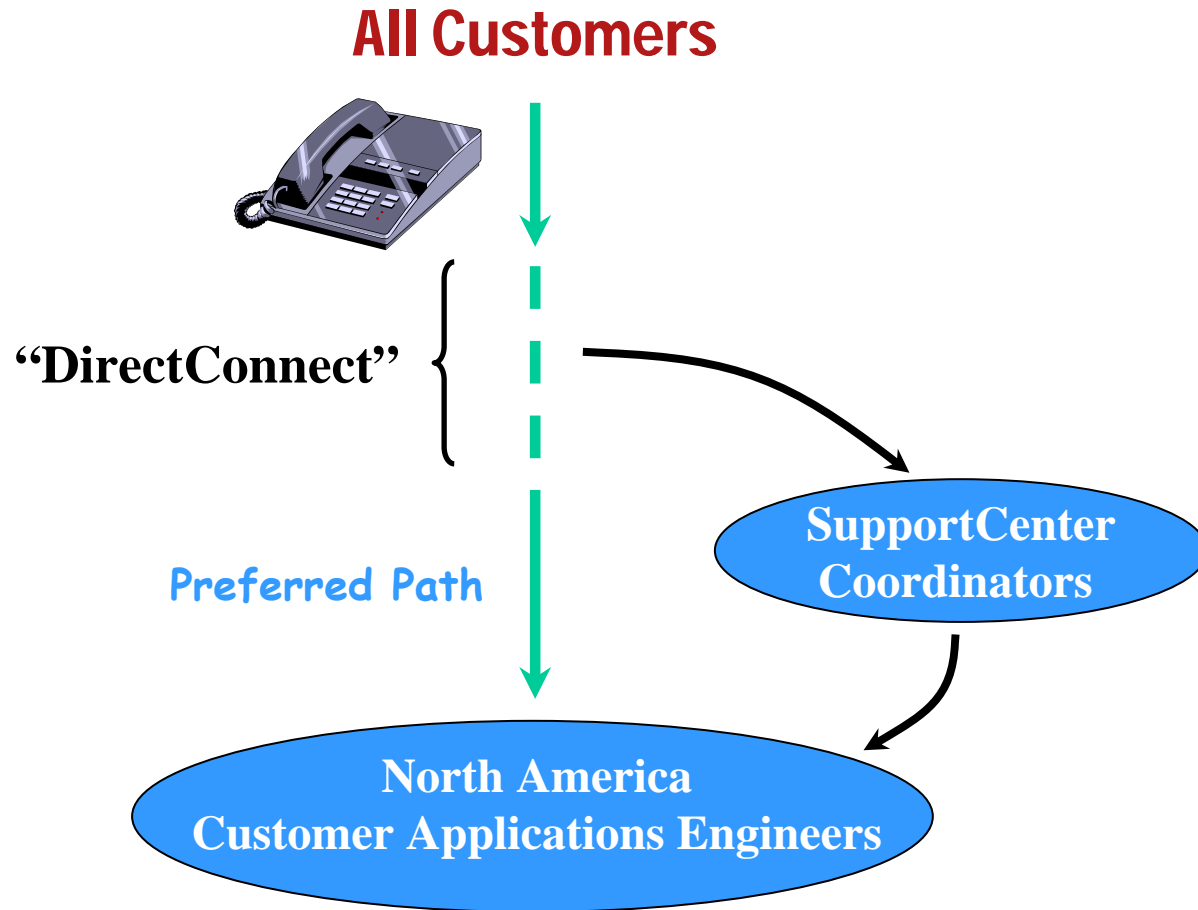■ **The *only* 5 STAR support in EDA**

Presentation Topics

- **Overview of Mentor Graphics' web support initiative**

  — Moving from phone to web

- **Key tactics, messages, metrics**

  — Including regional variations

- **Results**

- **Web support and mergers**
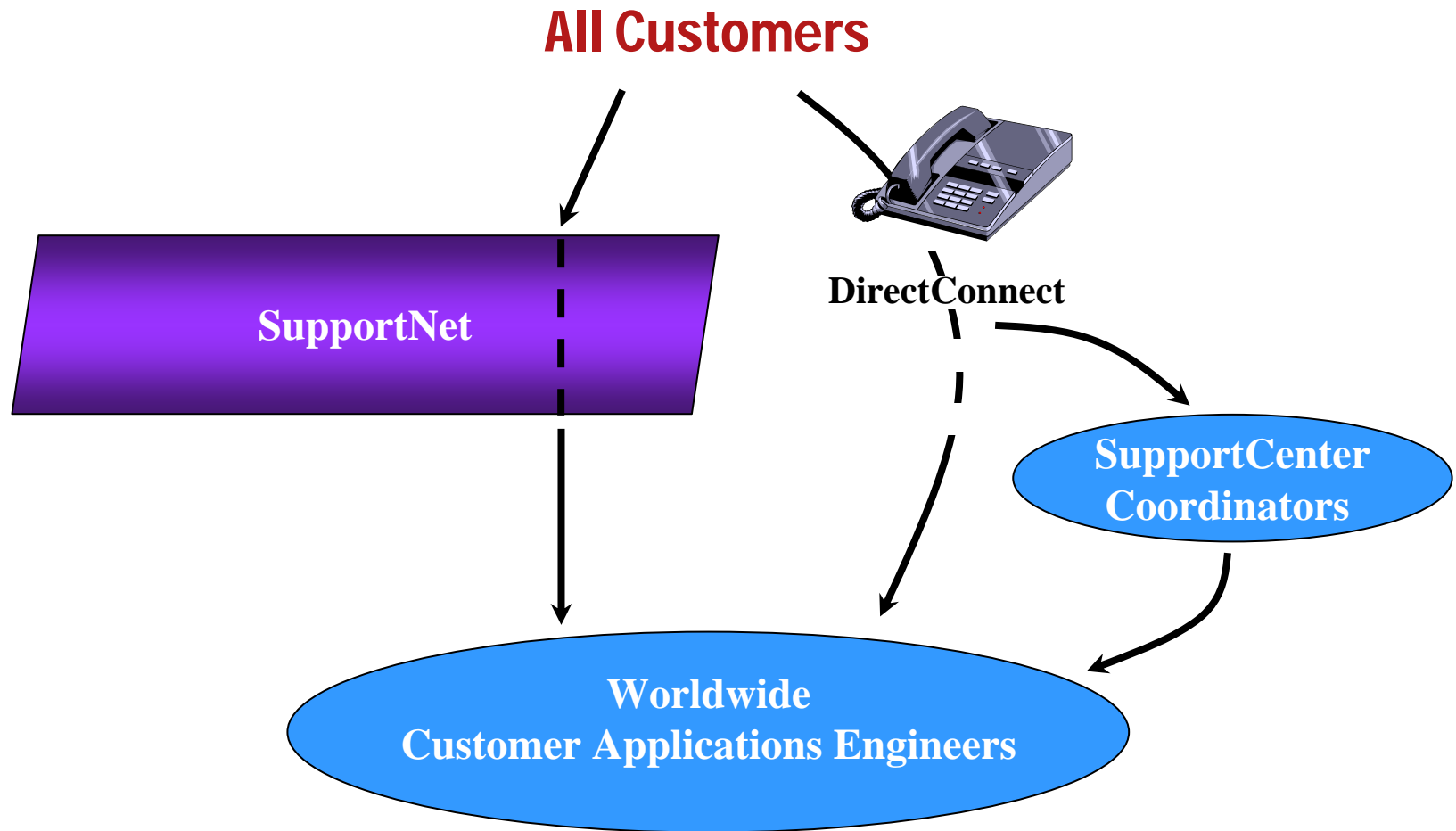
  — Easing the customer transition

1993: Phone Support is #1
Look how easy we made the phone!

All Customers

"DirectConnect"

Preferred Path

SupportCenter Coordinators

North America Customer Applications Engineers

2002: Improved Web Capability
Customer's choice: Web or Phone

All Customers

SupportNet

DirectConnect

SupportCenter Coordinators

Worldwide Customer Applications Engineers

2005 – 2006: *Driving* Web Support

- **Profile**
  - We needed more bandwidth for value-added support activities
  - Our web site was "very good" and continuing to improve

- **Objective**
  - Get more customers to their answers in the fastest possible way
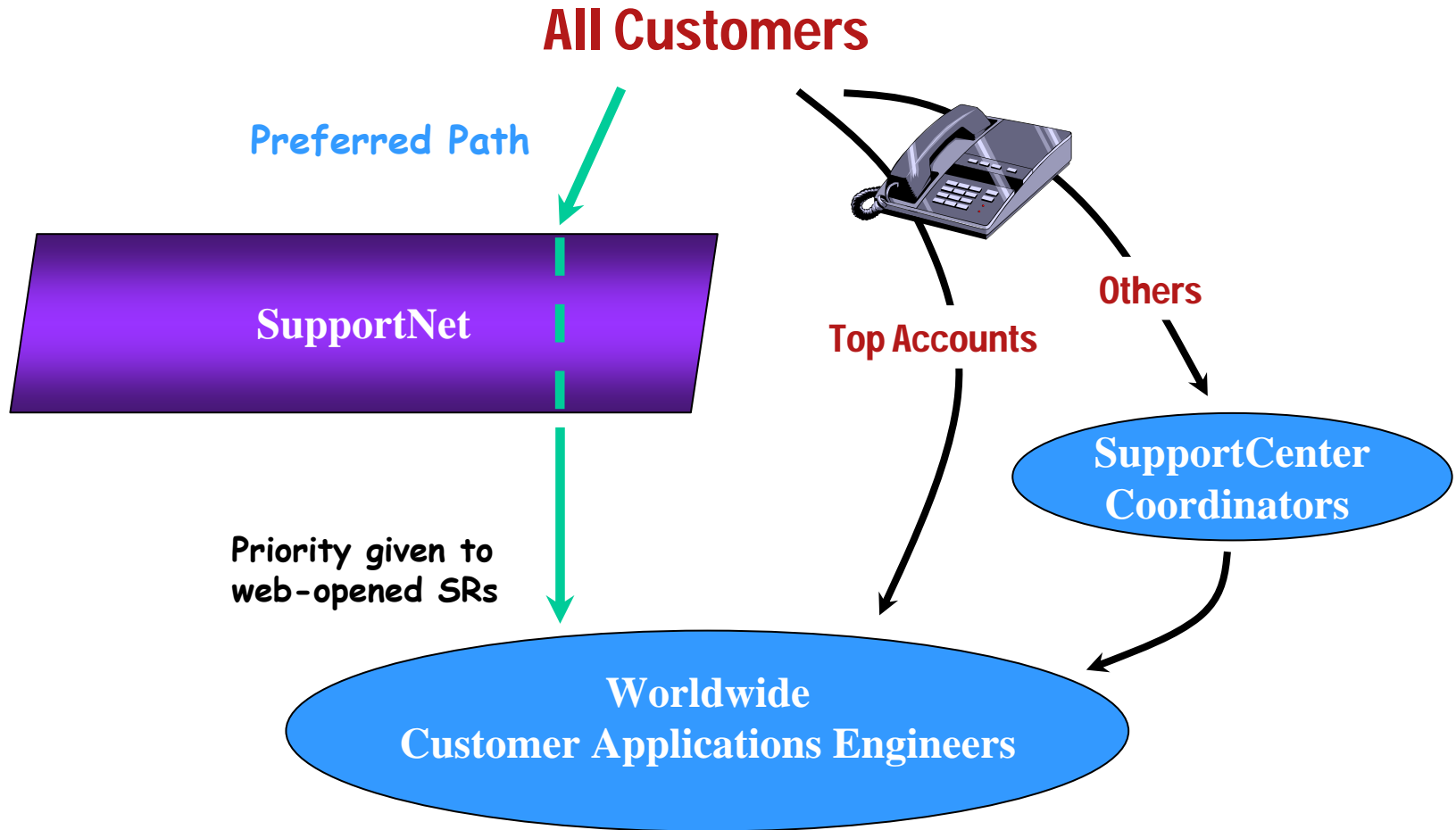 - Decrease incoming Service Requests by increasing web self-help

- **Strategy**
  - Change the way customers access our technical experts—from phone to web—while preserving high-touch support when needed

- **Tactics**
  - Eliminate direct-dial phone access; limit to top accounts
  - Strive for faster response to Service Requests opened via the web
  - Focus on getting the "right content" on the web for all products

2005 – 2006: *Driving* Web Support
Phone reserved for Top Accounts and Callbacks

All Customers

Preferred Path

SupportNet

Others

Top Accounts

Priority given to web-opened SRs

SupportCenter Coordinators

Worldwide Customer Applications Engineers

Key Tactics

- **Eliminate direct dial phone access**
  - Make the phone "less easy"—no more direct connect to an expert
  - Stop prominently advertising our 800 number

- **Strive for faster web response**
  - Establish a faster response time target for web-opened SRs

- **Focus on getting the right content on the web**
  - Establish a separate organization within CSD dedicated to helping support teams determine and publish the most important content
  - Designate a "Contributing Editor" within each support team to facilitate content creation
  - Shift Knowledge Management metrics from quantity (publishing rates) to quality (web traffic and troubleshooting success)

"Simplifying" the Phone System

- **As of Q3-2006, North America customers requesting technical assistance via telephone hear the following:**

"If this is an existing issue and you have your SR#, please enter it now. For new issues, please visit us on the web at www.mentor.com/supportnet. If you need assistance, please press 0 now."

- **This change is for <u>all</u> products and <u>all</u> customers calling the published 800 number**

  — Top Accounts continue to have DirectConnect when using their dedicated 800 numbers

- **Customers who press 0 are routed to a Support Coordinator (dispatcher) who walks them through the process of searching and opening an SR via the web**

The Right Content on the Web

1 re-use   1 re-use

Or

10 re-uses   10 re-uses

- **Every customer issue is captured in our call tracking system**
  - But internal re-use drives *publishing* to the web

- **Contributing Editors lead teams in analysis of available data**
  - Internal re-use, search trends, quality metrics, etc.

- **Teams also *anticipate* key content needs (and types) based on their experience**

China and India

- **Q2-2006: First China, then India, decided to "delay" picking up the phone. Tactically this involved simply changing their outgoing phone message:**

  "You have reached <name>. I can't answer the phone right now. By clicking on 'Support' from Mentor Graphics' web page, you can enter our SupportNet to search for solutions or submit a service request. We will get back to you as quickly as possible. Thank you."

- **In addition SupportNet has been promoted extensively:**
  — SupportNet training is provided with each onsite customer visit and customer training event
  — Every new customer is automatically registered for SupportNet
  — Unique SupportNet visitors are tracked and the most frequent users receive a SupportNet logo T-shirt

Implementation Philosophies

- **Our support web site does not *replace* our people (or personalized, high-touch support); it's a different way to *access* our people and their expertise**
  - A key message for both customers and employees! **Win-Win-Win**

- **No takeaways from a Service Agreement perspective:**
  - "The phone is still available but we are tuning our organization to respond most rapidly to Service Requests opened via the web."
  - Our response time target for phone SRs remains the same

- **Web support isn't free**
  - This is not a cost saving initiative—it takes a large investment in resources to establish a quality web site—and that investment results in value customers should be willing to pay for

Web Support Benefits

- **Customers can find many answers immediately, 24/7**

- **Customers can easily enter Service Requests 24/7**
  - We respond in our normal business hours as defined in our Service Agreements

- **Consistent Service Request entry method worldwide**
  - No more "Which office do I call?"
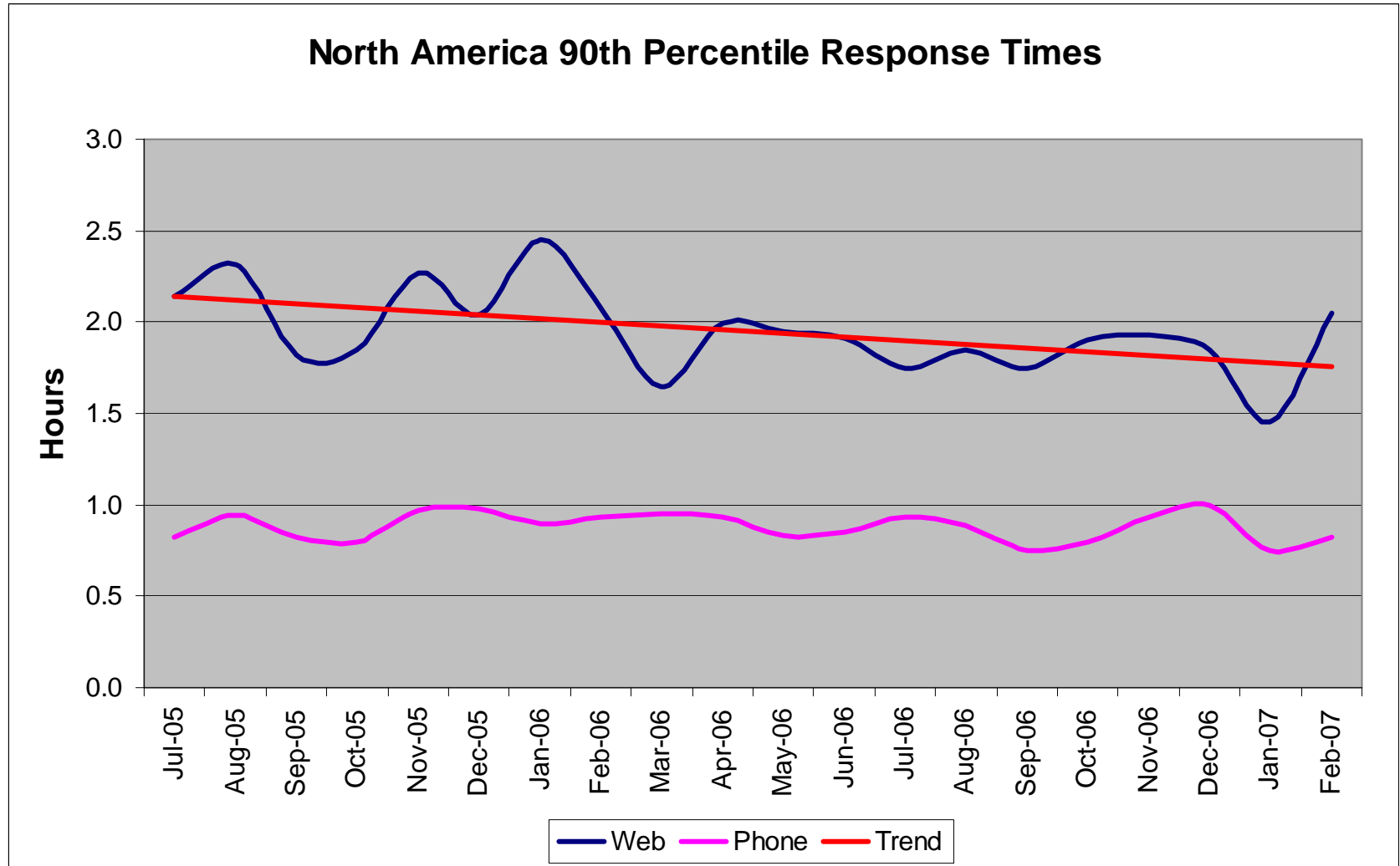 - Facilitates regional workload sharing
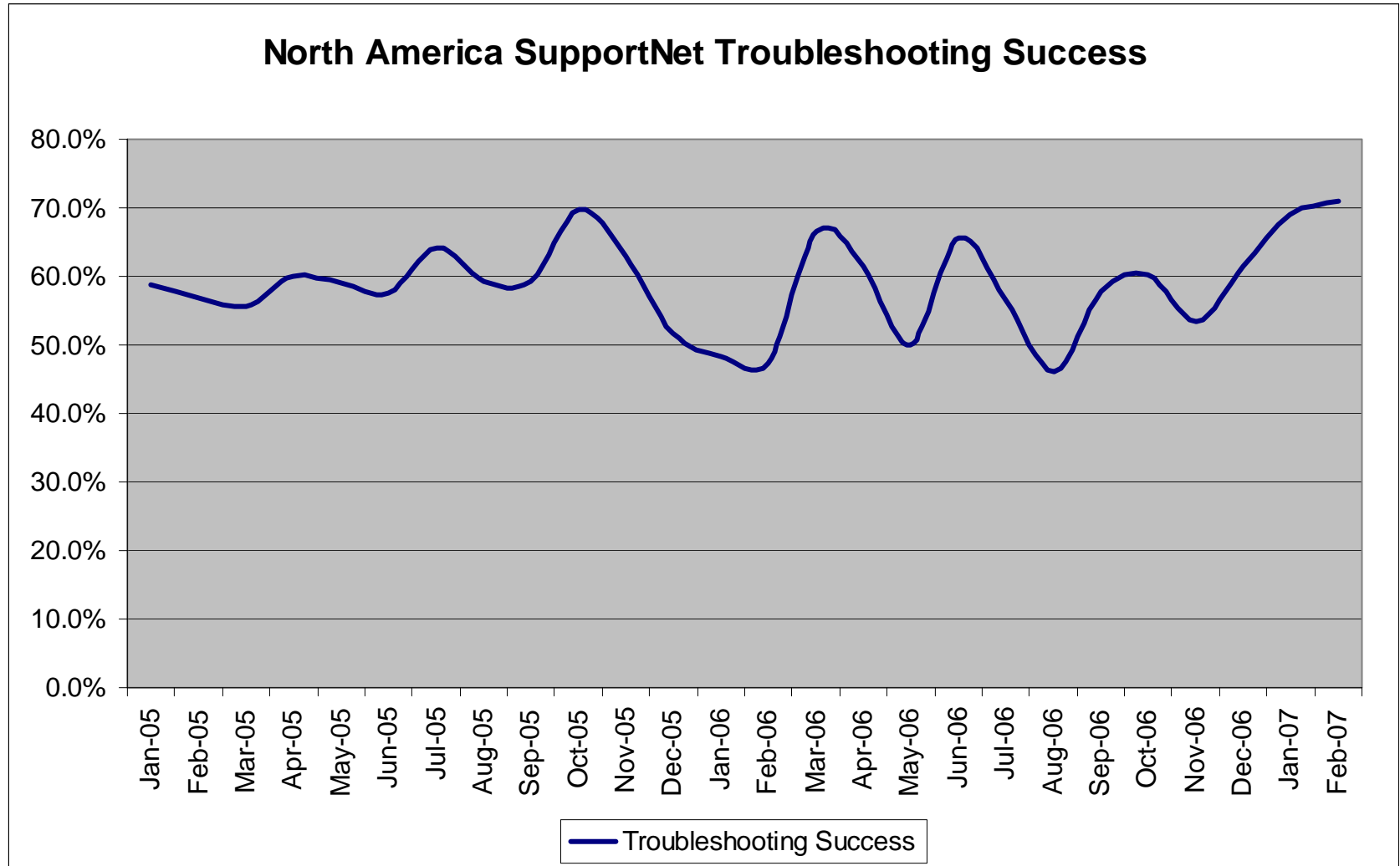
find it fast @ SupportNet

Metrics

- **Customer Support Division metrics updated in 2006 to reflect Web-Support emphasis:**
  - Response time for web-opened Service Requests
  - Customer reported web-troubleshooting success
  - Unique visitors viewing web-based content

- **Overall Customer Satisfaction (SR Incident Surveys) remains the 4th Customer Support Division Key Metric**

- **Team-specific Key Performance Indicators reflect a *quality* emphasis (the right content) rather than the *quantity* of publishing**
  - Top 20 issue coverage
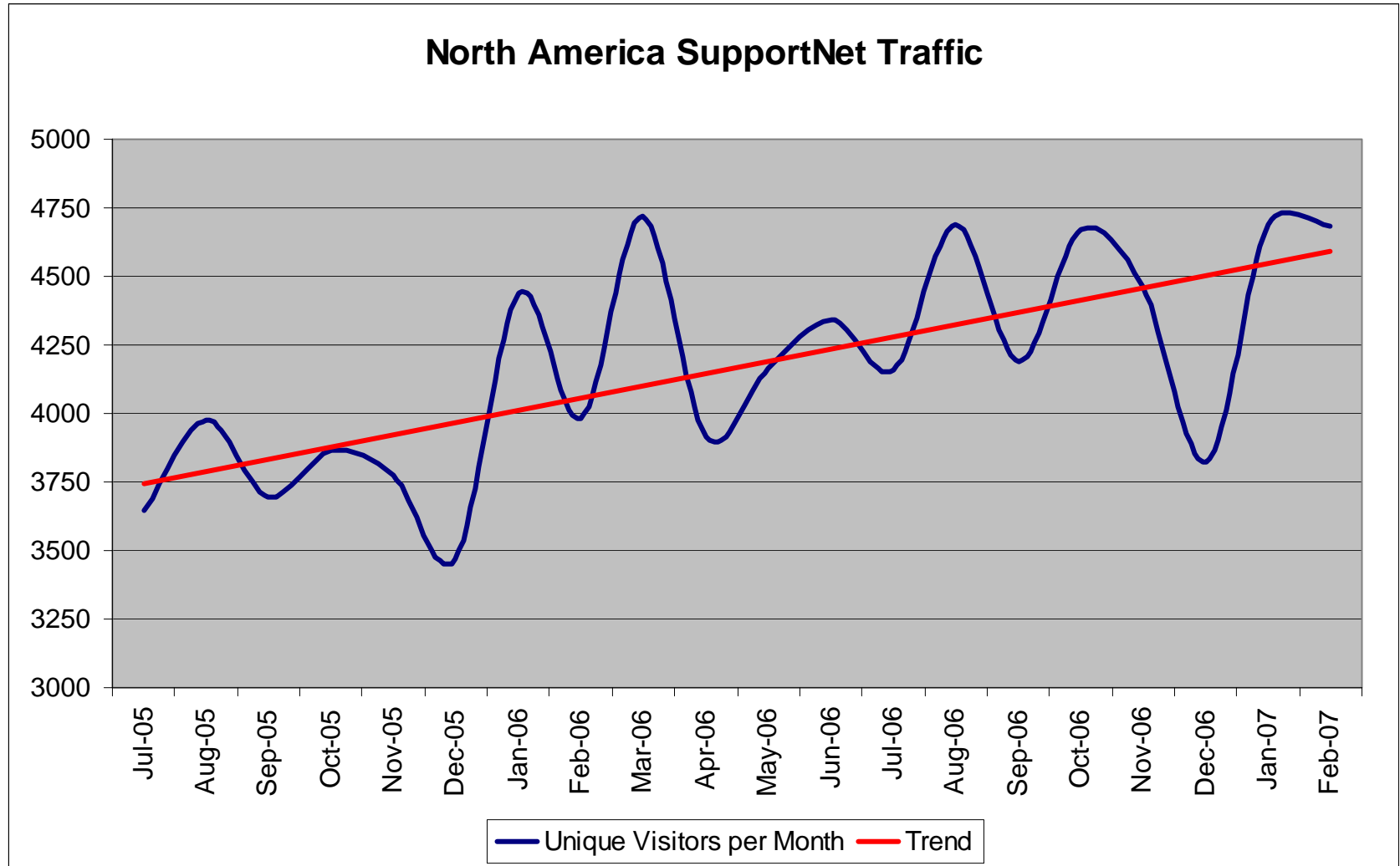 - Number of web "hits" to Top 20 content
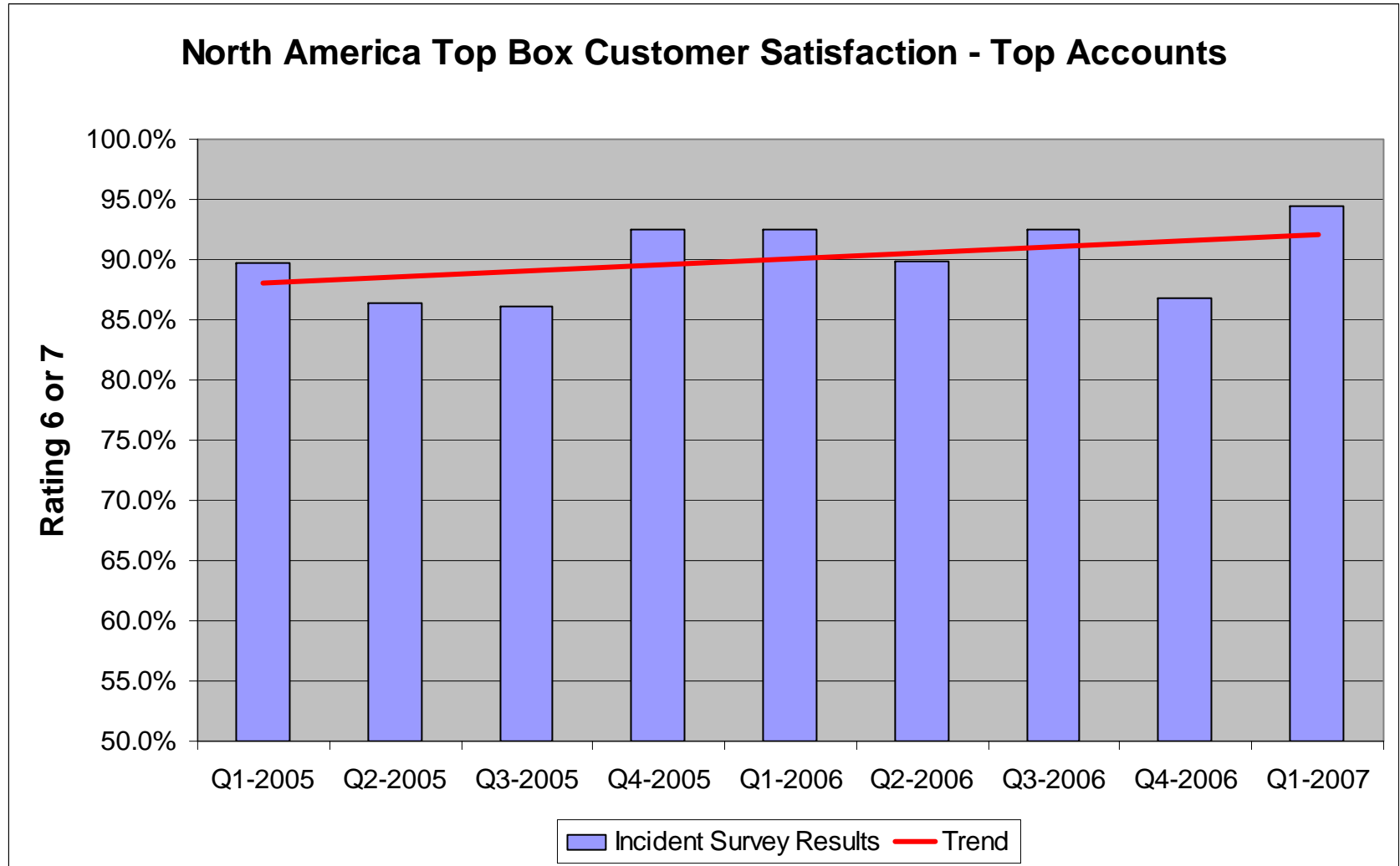
Improved Web Response Time

North America 90th Percentile Response Times

A. Westlund: Making Web Support the First Choice, v1.4 - Mar-2007 - Company Confidential

Consistent Troubleshooting Success

North America SupportNet Troubleshooting Success

Increased Web Traffic

North America SupportNet Traffic

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World Class Customer Satisfaction

North America Top Box Customer Satisfaction - Top Accounts

Rating 6 or 7

Legend: Incident Survey Results — Trend

Mentor Graphics®

Shift in Service Request Open Method

North America SRs Opened

Legend: SupportNet, Phone/Email, SupportNet%
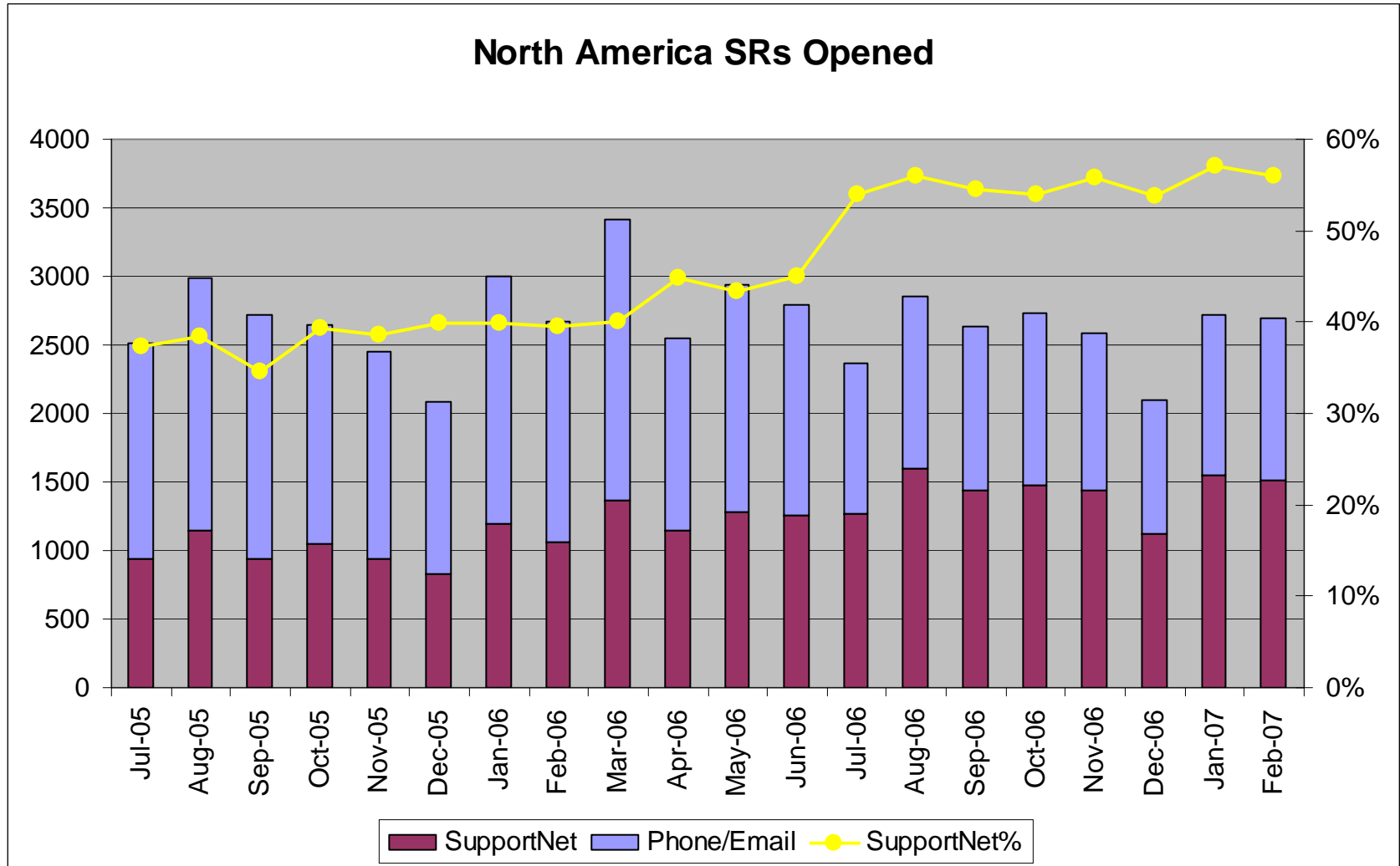
Increased Web-Support Attempts

North America Customers Who Attempted SupportNet Before Opening SR

Legend: ■ Yes Percentage

X-axis: Q3-2005, Q4-2005, Q1-2006, Q2-2006, Q3-2006, Q4-2006, Q1-2007
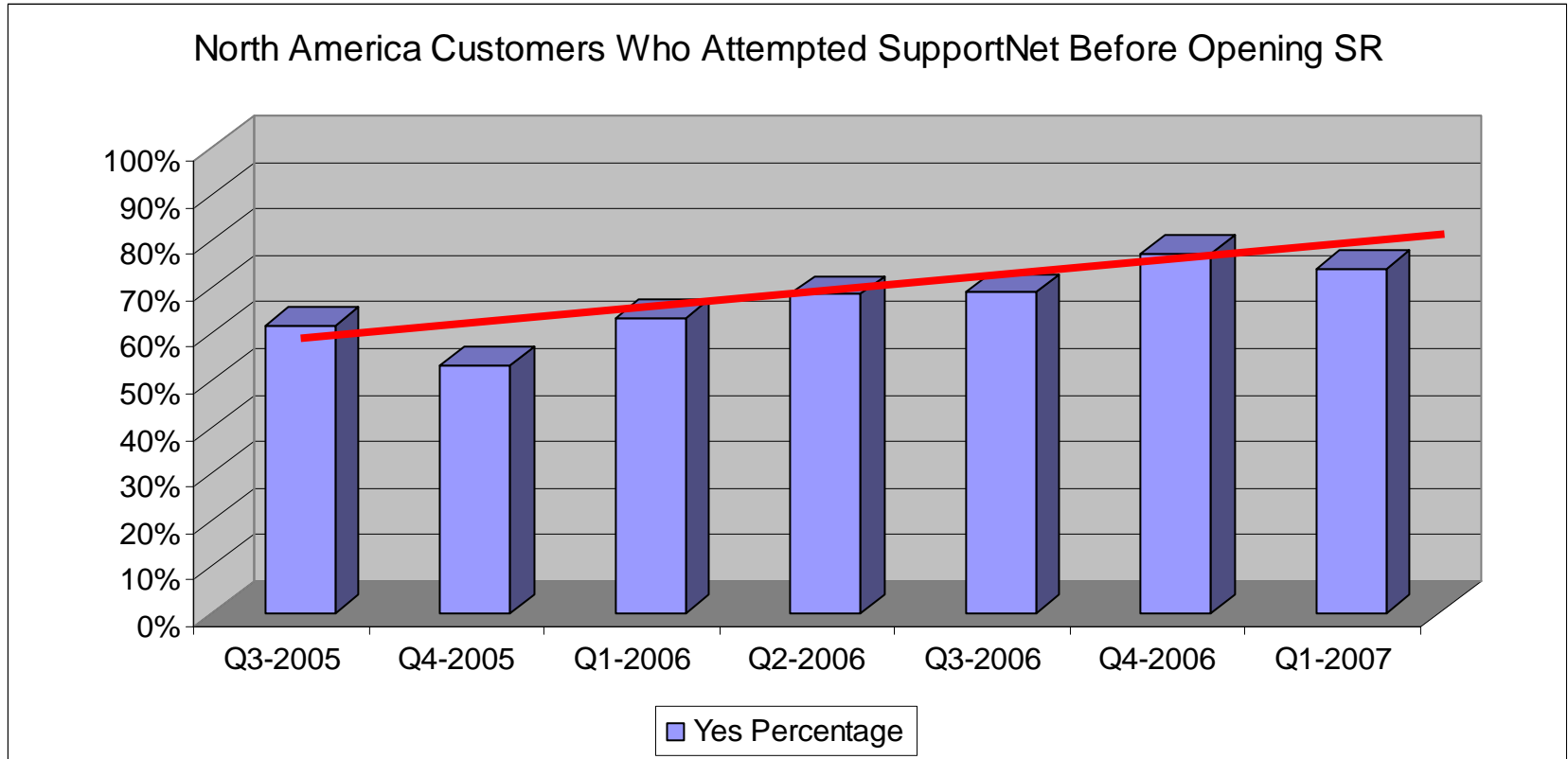
Survey Question: "Prior to contacting Customer Support, did you attempt to resolve your issue by using the SupportNet KnowledgeBase?"

PacRim Results

- **SRs logged via the web increased from 30% to 65%**

- **Overall Service Request volume *decreased***

- **Only one customer complaint**

- **And, most importantly, customer success:**

Were you able to accomplish the goals that prompted your visit?

Custom Sample/PACRIM 2006 N=694 2007-01-09 15:28

	%
Yes	79.25%
No	20.75%
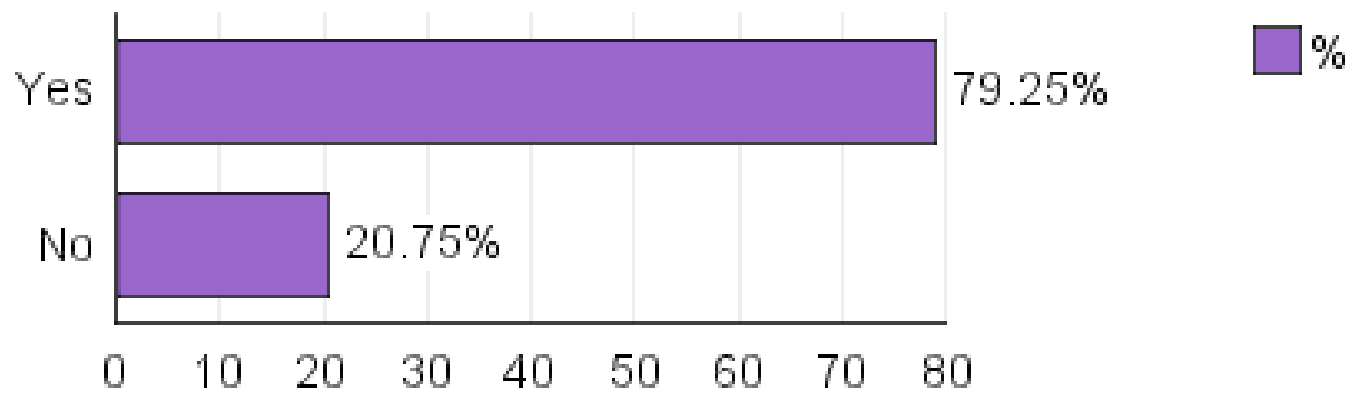
Success! In Our Customers' Words

"Support is my favorite feature of the Mentor tools, especially SupportNet. **Nine times out of ten I'll find my solution and learn other new things along the way.**"

"**I indeed found the answer from the web.** Thanks again."

"Your customer support person **helped me navigate your website and walked me through opening a new Service Request**. As a long term business owner, I want to say a strong and resounding THANK YOU!!"

"I submitted my help request via the web. **I got a call back before I closed the window!**"

"I have been most impressed with the response time of service calls; **I no sooner put a SR in online and I am getting a phone call about my problem.**"

Web Support and Mergers

- **EDA is a vertical market well known for M & A's**
  - Mentor Graphics has done several in the past decade

- **Our web site has eased the transitions by providing an immediate front-end to get customers to the right place**

- **A feature-rich and easy to use site provides a good first impression for transitioning customers**

Model Technology
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INCORPORATED

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Mentor Graphics

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INNOVEDA.

Router Solutions, Inc
Integration Tools for CAD/CAE/CAM

SUMMIT

First Impressions for New Customers

Summary

- **Establishing web support as *the* gateway for support is a win-win-win**

- **You *can* motivate customers to change:**
  — Make the phone less easy
  — Respond fast
  — Focus on quality web content

- **Measure, listen, adjust**
  — Let the organization know what is important
  — Learn from customer feedback

www.mentor.com