



# Web Support First *Motivating Customers to use Web Support*

vision  
vision

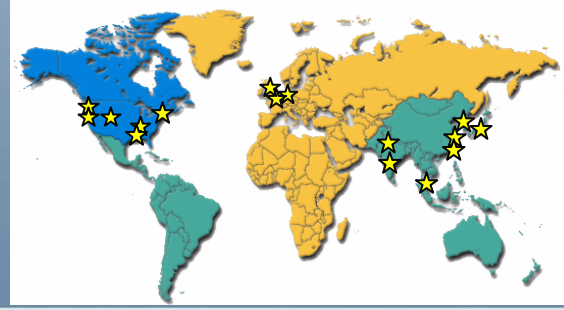
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Services Industry Summit  
May 21 – 23, 2007



# Introductions



- Mentor Graphics Corporation
  - A technology leader in Electronic Design Automation 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

# What is Electronic Design Automation?



- The Electronic Design Automation (EDA) industry provides the design software used to create all of the world's electronic systems.
- It is time-critical technology used to design the most complex system-on-chip (SoC) semiconductors & printed circuit boards.
- Mentor Graphics has been an EDA industry leader for 25 years with annual revenues over \$700 million.

VISION

# 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



The Year's Ten Best  
Web Support Sites

# Presentation Topics

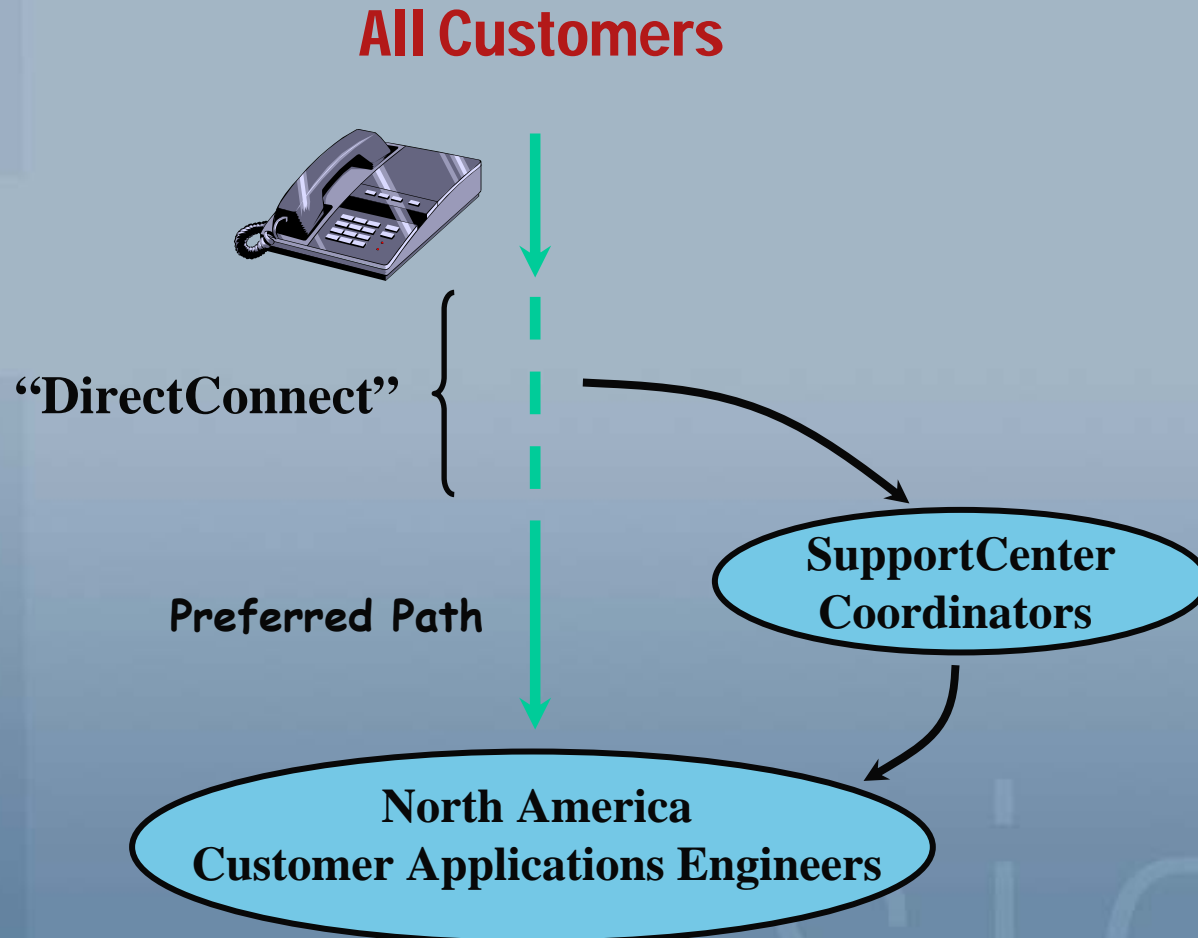
- Overview of Mentor Graphics' web support initiative
  - Moving from phone to web
- Strategy and Tactics
  - Messaging
  - Motivating Change
  - The Right Content
- Results
  - Monitoring trends and feedback





# 1993: Phone Support is #1

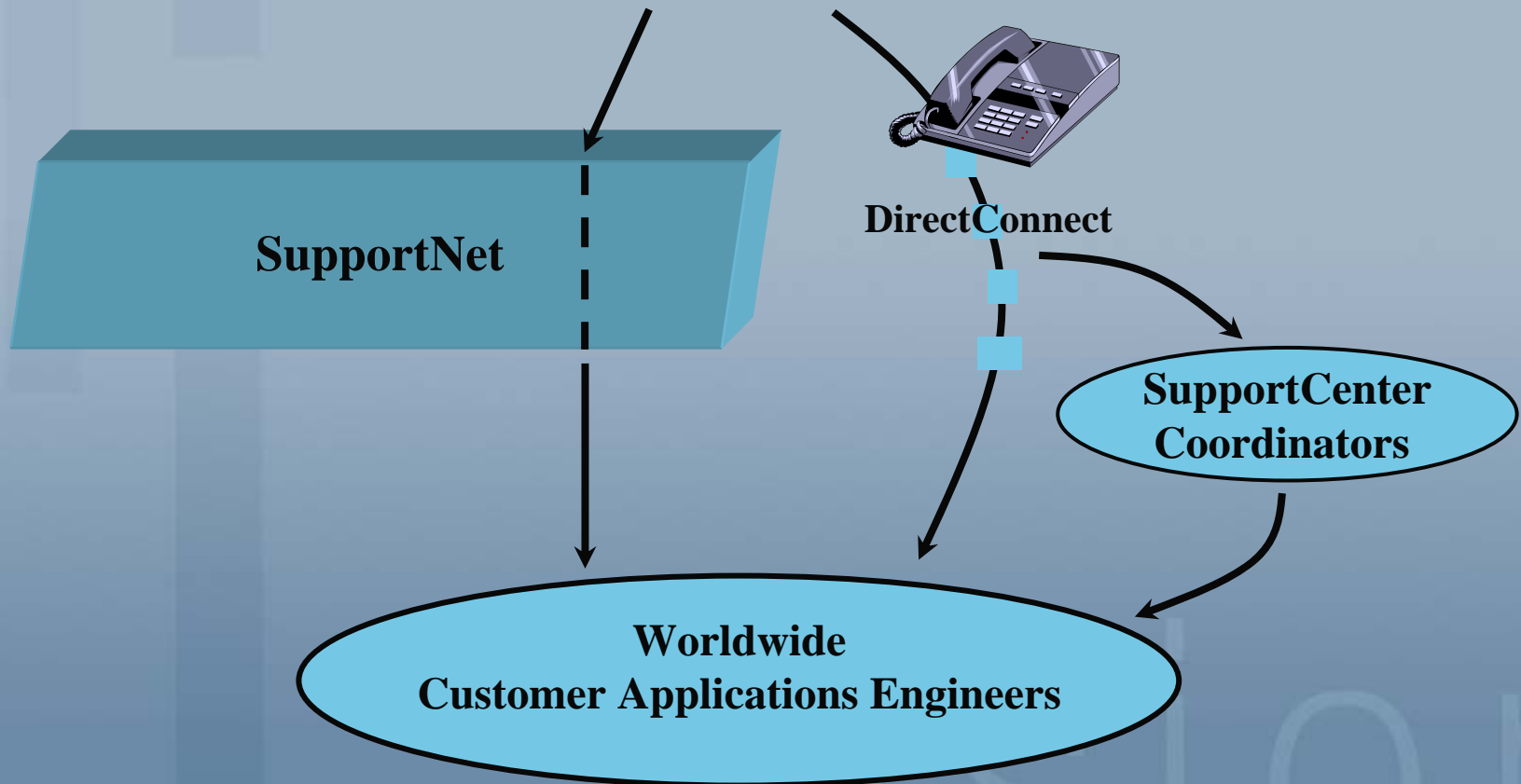
Look how easy we made the phone!



# 2002-2005: Improved Web Capability

Customer's choice: Web or Phone

## All Customers





# 2005 – 2006: *Driving* Web Support

- We needed more bandwidth for value-added support activities
  - Strategic Account Support
  - Customer Training / Onsite Visits / CAE Learning
  - Proactive Product Division work
  - Knowledge Management
- Our web site was “very good” and continuing to improve, but customers still preferred phone over the web
- We needed a new strategy...





# 2006: *Driving* Web Support



*'Handle more requests via  
the web'*

Tom Floodeen, VP & GM  
Mentor Graphics Customer Support

# Shaping the Message and Developing tactics

## 'Our Support Machine has a new front end'

- Eliminate direct dial access for Mass Market, change outbound messages and menu structure
- Make using 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 SRs opened electronically

## 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)



The screenshot shows the Mentor Graphics CSDNet website. The main headline is "Our Support Machine Has A New Front End". The article text reads: "SupportNet First has been a long-standing initiative within CSD. For the past year our worldwide support teams have been refocusing the support delivery process to emphasize Service Requests opened on SupportNet. Starting a year ago in June, 2005, in North America all incoming phone calls for PADS were directed to the SupportCenter Coordinators. We followed this with Expedition and Environment calls later in the year. The coordinators opened a Service Request, told the customer to expect a callback from a CAE, and suggested that customers search SupportNet for solutions in the interim. CAEs on those teams selected SRs from their queue with priority given to SRs opened on SupportNet. Beginning June 23, 2006 we plan to take the SupportNet First initiative to the next level. We are streamlining our North American call handling process and menu structures so that there are two simple choices for all customers who call the main 800 support number for all product groups: 1) If the customer is calling on a new issue, they will hear a recorded message that invites them to visit SupportNet to open a new Service Request. 2) If they are calling on an existing issue, they can enter their SR number and speak to their CAE. We are making these changes because our goal is always to get customers the correct answers as fast as possible, and SupportNet is the fastest way to get an answer. Over 75% of the time, customers report they are successful immediately using SupportNet. Our average telephone response time can reach over an hour. We are not changing the value customers receive from support. A support contract from Mentor still delivers enhancement releases, technical support, and SupportNet access. What is changing is that the front end to our award-winning technical support team is now SupportNet, not the telephone. Our published response time commitment to customers remains "within 2 hours" no matter what method the customer uses to open an SR, although we are setting expectations that we will try to assign Service Requests opened online within 30 minutes. Finally, just a reminder to please update your signature blocks, voicemail greetings, and out of office messages to promote SupportNet instead of the support center telephone numbers. Thanks for your help making SupportNet First a continued success. Tom. Link to INTERNAL FAQ"

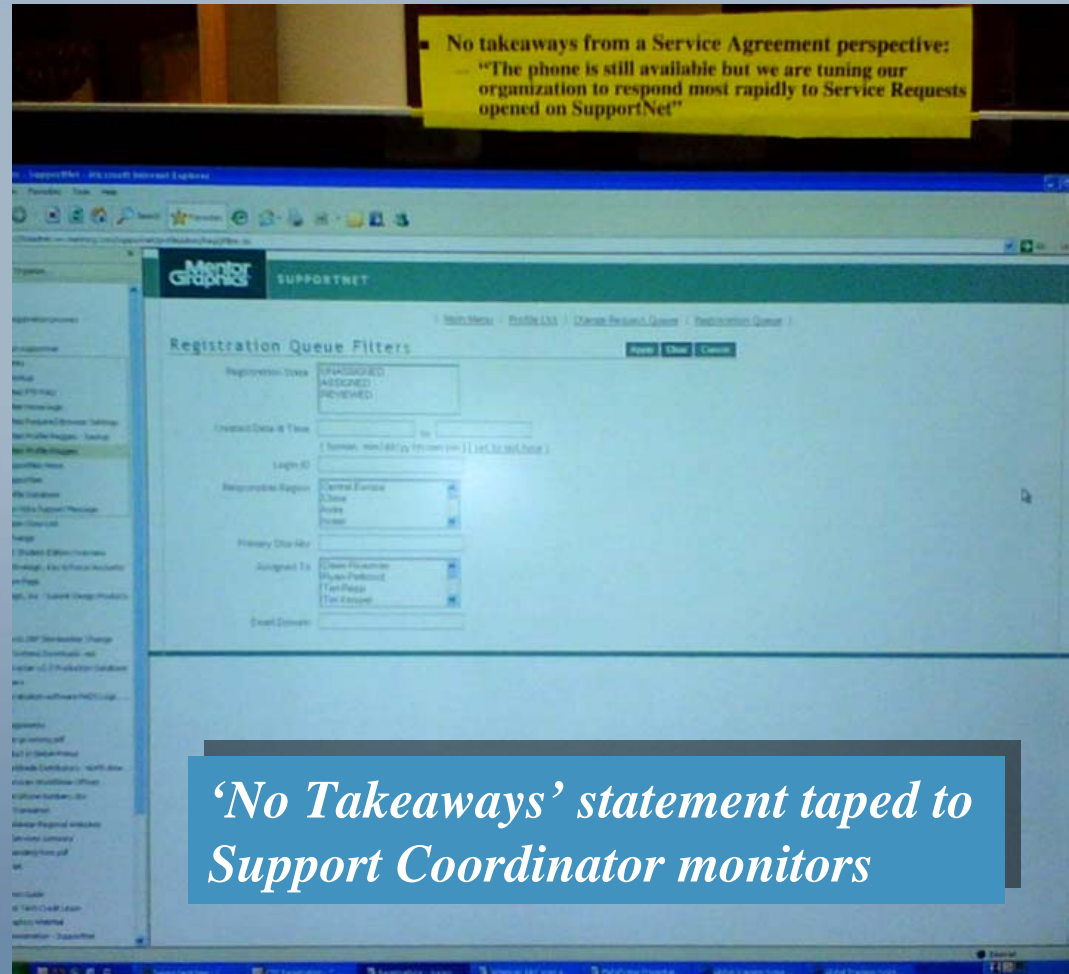


# 'Simplifying' the Phone System

- As of June 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](http://www.mentor.com/supportnet). If you need assistance, please press 0 now.”
- This change is for all products and all 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

# Refining the Message

- 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



# Promoting Benefits of Web Support

- 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**

# Motivating Change

## From Phone First to Web First

■ More rapid response to issues opened via web vs. phone

- Changing metrics
- Changing perceptions
- Changing tools

Open_Method	SR/ACT. Number	D.H.M	Customer Class	Priority	Product	Summary	Queue Name	Customer
Distributor	1-1KADU0	223:17:12	Mass Market	Medium	Calibre RVE	Strange phenomenon	CALIBRE_NA	Fujitsu Ltd.
Distributor	1-1Y84LC	11:59	Focus	High	HDL Designer Series	need some help	NA_HDL	ASML
KB	305893401	116:22:43	Mass Market	Medium	Calibre E2LVS/V2LVS	v2lvs does not support	CALIBRE_NA	Vitesse Se
Phone	318035417	2:12	Mass Market	Medium	ModelSim Designer	See attached e-mail:	NA_HDL	Rockwell C
KB	318099001	1:49	Mass Market	Medium	QuestaSim	questa vopt :	NA_HDL	Mentor Gre
KB	318115301	13	Global	Medium	Expedition PCB	Need ability to route diff	NA_EXPEDITIC	Intel Corpo
KB	318113801	25	Mass Market	Medium	MS Analyzer	documentation - icflow	NA_HDL	Legentiy, Ir

# Motivating Change

## Promoting the Web (Coordinators)

### Messaging

- Their job is not going away
- Their contribution can help us achieve vision

### Participation

- Their input and feedback is key

### Training

- Phone Scripts and Email Templates
- Practice Sessions-Role Play
- Online Tutorials



Driving SupportNet First Initiative - Communication

#### INTERNAL FAQ

##### Q1. What is changing on June 23rd?

**A1:** We are streamlining our North American call handling process and telephone menu structures. When customers call the main 800 support number in North America for all simple choices: 1) if customers are calling on existing numbers and speak directly to their CAEs, 2) if as, they can open SRs on SupportNet (with the help of it).

**Customers receive from their support contract?**  
Mentor still delivers enhancement releases, technical What is changing is that the front end to our award-winning SupportNet, not the telephones, but we are not restricting customers' access to CAEs.

**Usage?**  
Because our goal is always to get customers the correct supportNet is the fastest way to get an answer. 76% of using SupportNet. Our average telephone response supportNet helps customers immediately 3 out of 4 times.

**?**  
American initiative. Other regions have different call diffied to drive SupportNet first over time.

**Have internet access, is on a cell phone, or for n SupportNet?**  
An SR for customers, but this will become an

**After June 23?**  
Cell accounts will still have the ability to route to CAEs via y do today to receive global and strategic calls.

**This change?**  
Announcement to let customers know about the and opening a Service Request on SupportNet to get

**Expectation for Service Requests that come in via queue?**  
Hasn't changed. It is still 2 hours.

**Late critical issues in North America?**  
SupportNet process should be followed: Group cell phone, then 1800, then Director cell phone.

**Happy, complaining customers in NA? A10:** For ins), pass the call to Andy Westlund immediately.



Driving SupportNet First Initiative - Communication

#### COORDINATOR SCRIPT TO ASSIST CUSTOMERS OPENING SRs ON SUPPORTNET

- 1) Customer calls the SupportCenter 800#
- 2) Does customer have an existing SR number?
  - If yes, they can route themselves through the system with SR number, or if they 0-out, coordinator forwards to CAE assigned.
  - If no existing SR number, check to see if
    - customer is Open Door partner or competitor (see Competitor Domain List: [http://www.profiles/ist\\_competitor\\_domain.cfm](http://www.profiles/ist_competitor_domain.cfm)) OR
    - registered for SupportNet.
- 3) If customer is an **Open Door** partner or on **Competitor Domain List**, they cannot access SupportNet by contract, so open SR for them and place SR in queue normally.
- 4) If customer **is not** registered for SupportNet
  - *I see you are not registered for SupportNet yet.*
  - *I'll open a Service Request for you this time, AND get you signed up for SupportNet. Then the next time you have a question you can open a Service Request online yourself.*
  - *What's your site number?*
  - Register customer for SupportNet
  - Open Service Request for them and tell them the SR number.
  - Let the customer know to expect 3 emails
    - 1) a SupportNet registration confirmation email with their login and password,
    - 2) an email from you with a short presentation on how to open a Service Request on SupportNet.
    - 3) a "Service Request Opened" email with the SR number
- 5) If customer **is** registered for SupportNet
  - *Have you ever opened a Service Request on SupportNet? That's the fastest way to get a response.*
  - *Let's go to SupportNet and open a Service Request together.*
  - **Follow the presentation steps, a few of which are outlined here**
    - Type in [www.mentor.com](http://www.mentor.com)
    - Click on the word "SUPPORT" in the top horizontal gray nav-bar.
    - Now you're at SupportNet home. Please bookmark this site.
    - Now log in using the boxes in the upper right.
    - Click on "Open SR" in the upper right.
    - Follow the three-step process.
    - One of the steps is a search of SupportNet because the answer might already be available in our solutions database. 76% of the time users have told us they are successful using SupportNet.

# Motivating Change

## Promoting the Web (CAEs)

- Messaging
  - Increased SupportNet use=Increased Bandwidth
- Participation
  - Helping customers find the solutions they create will increase customer satisfaction
- Training
  - Tutorials
  - CAE-to-CAE training

**SupportNet Topics Menu**

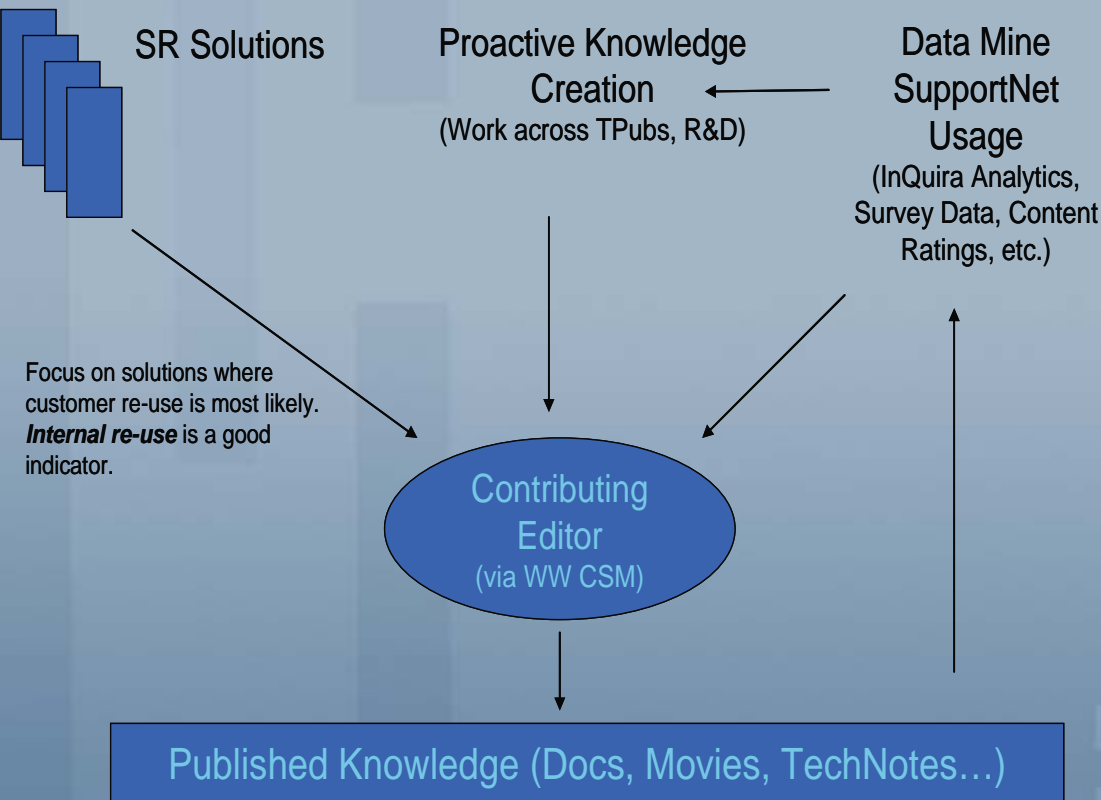
<a href="#">Start</a> ▶ 1) Your First Visit: Log in or Sign up (1 min.)	<a href="#">Start</a> ▶ 7) Service Requests (4 min.)
<a href="#">Start</a> ▶ 2) Your First Visit: Choose Your Products (2 min.)	<a href="#">Start</a> ▶ 8) System Administrator (1 min.)
<a href="#">Start</a> ▶ 3) Overview: All About Your Products (1 min.)	<a href="#">Start</a> ▶ 9) Search (1 min.)
<a href="#">Start</a> ▶ 4) Troubleshoot (1 min.)	<a href="#">Start</a> ▶ 10) Resources (1 min.)
<a href="#">Start</a> ▶ 5) Downloads (1 min.)	<a href="#">Start</a> ▶ 11) My Account - Licenses (1 min.)
<a href="#">Start</a> ▶ 6) Reference (1 min.)	<a href="#">Start</a> ▶ 12) My Account - Editing (1 min.)

Click **Start** to begin a topic or close this window to exit

Roll your mouse cursor over the playback controls to see their functions



# The Right Content on the Web



- 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

# Making Content Accessible SupportNet, Redesigned

## ■ *Make it fast & easy to find answers*

- Product Centric
- Task Oriented

The screenshot displays the Mentor Graphics SupportNet interface for PADS Logic. At the top, there is a navigation bar with links for PRODUCTS, SOLUTIONS, TRAINING & SERVICES, SUPPORT, and COMPANY. A search bar is present with the text "Type a phrase or question here to search within PADS Logic" and a "GO" button. Below the navigation bar, the page is titled "SUPPORT FOR PADS Logic". A sidebar on the left contains sections for "MY ACCOUNT" (Logout, Edit My Profile, Licenses), "MY PRODUCTS" (AccuParts, AccuParts for DxCsim, Calibre DRC, DxCDesigner-Expedition, PADS Logic, Board Station (BS), Dashboard), "PRODUCT FINDER" (Product name search), and "RESOURCES". The main content area is divided into "Troubleshoot" and "Downloads" sections. The "Troubleshoot" section includes a "I want to:" dropdown menu, "Top Troubleshooting Issues" (e.g., "PowerPCB: Can't find part type <XXXX> when importing netlist from PowerLogic or"), and "Recently Published" (e.g., "PADS Logic/Layout: How to Back Annotate changes from PADS Layout into PADS Logic"). The "Downloads" section lists "Current Releases" (e.g., "PADS 2005 SPac1 Downloads", "PADS 2005 SPac2 Downloads") and "Reference" (e.g., "How-Tos & Tutorials: Copy, Paste, and Renumber Commands in the Alphanumeric Pins Tab in PADS2005 SPac2").



# Monitoring Trends and Feedback

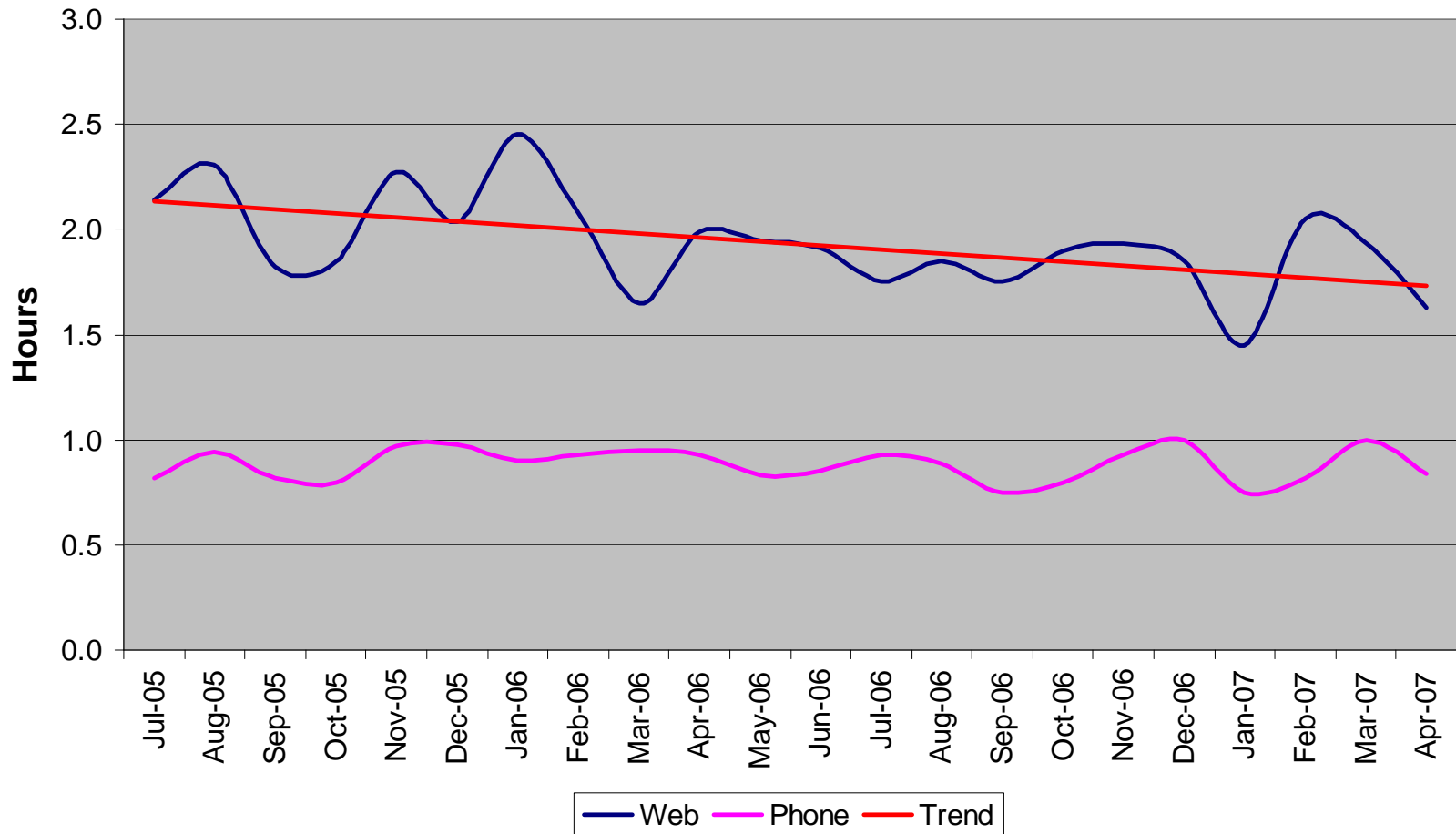
- Web Response
- Troubleshooting Success
- Web Traffic
- Customer Satisfaction
- Open Method
- Web Support Attempts
- General Feedback

vision



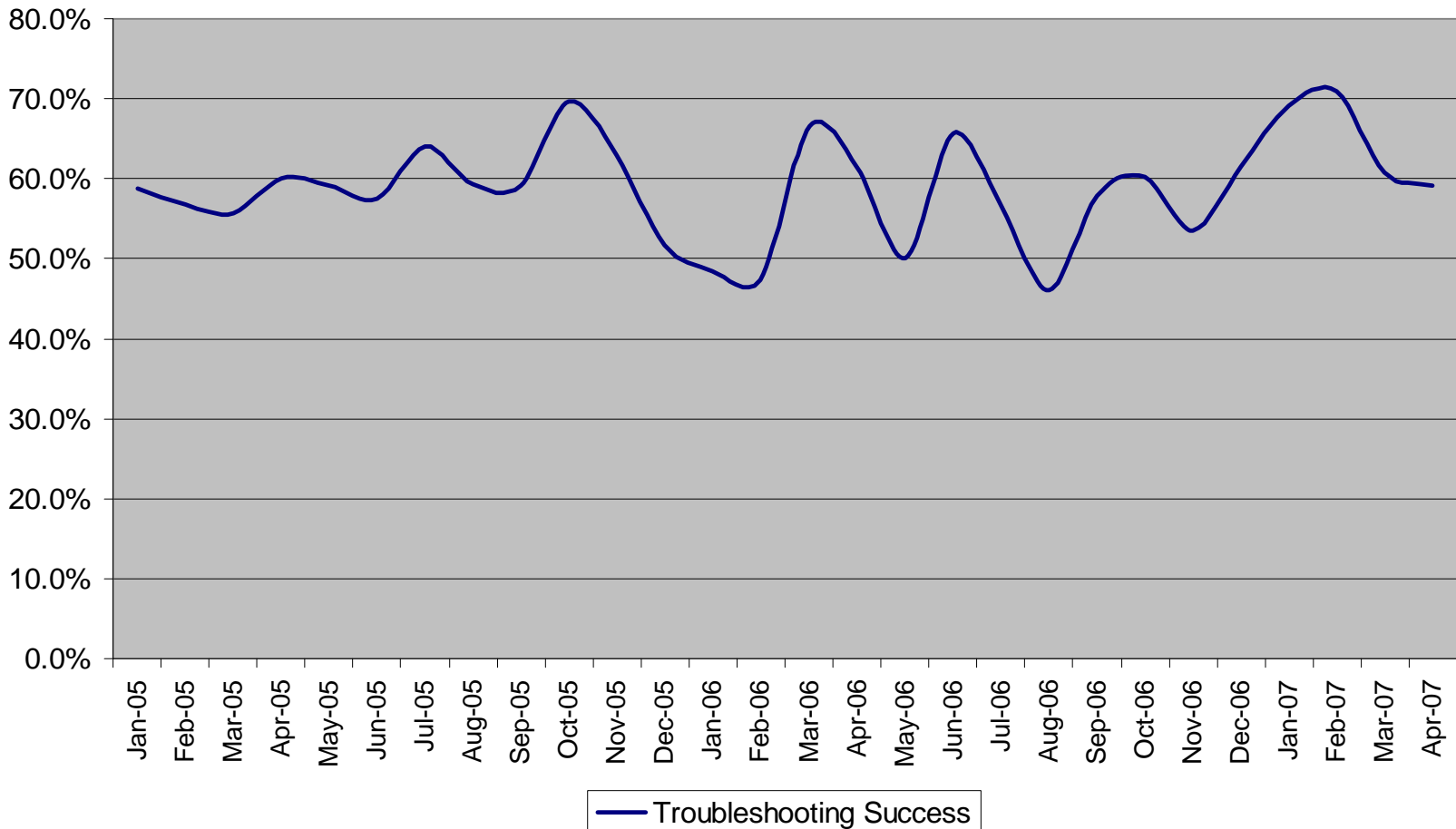
# Improved Web Response Time

## North America 90th Percentile Response Times



# Consistent Troubleshooting Success

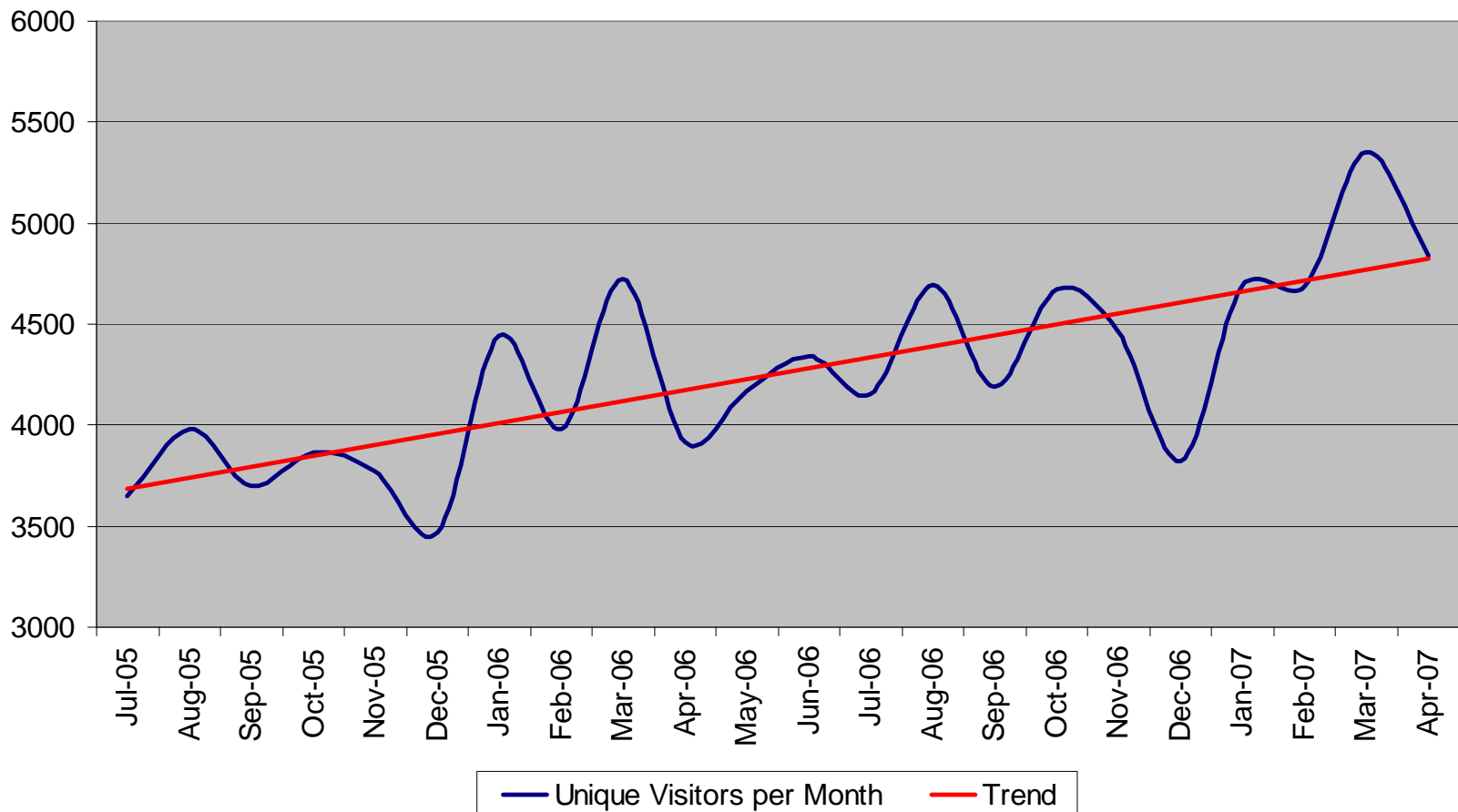
## North America SupportNet Troubleshooting Success





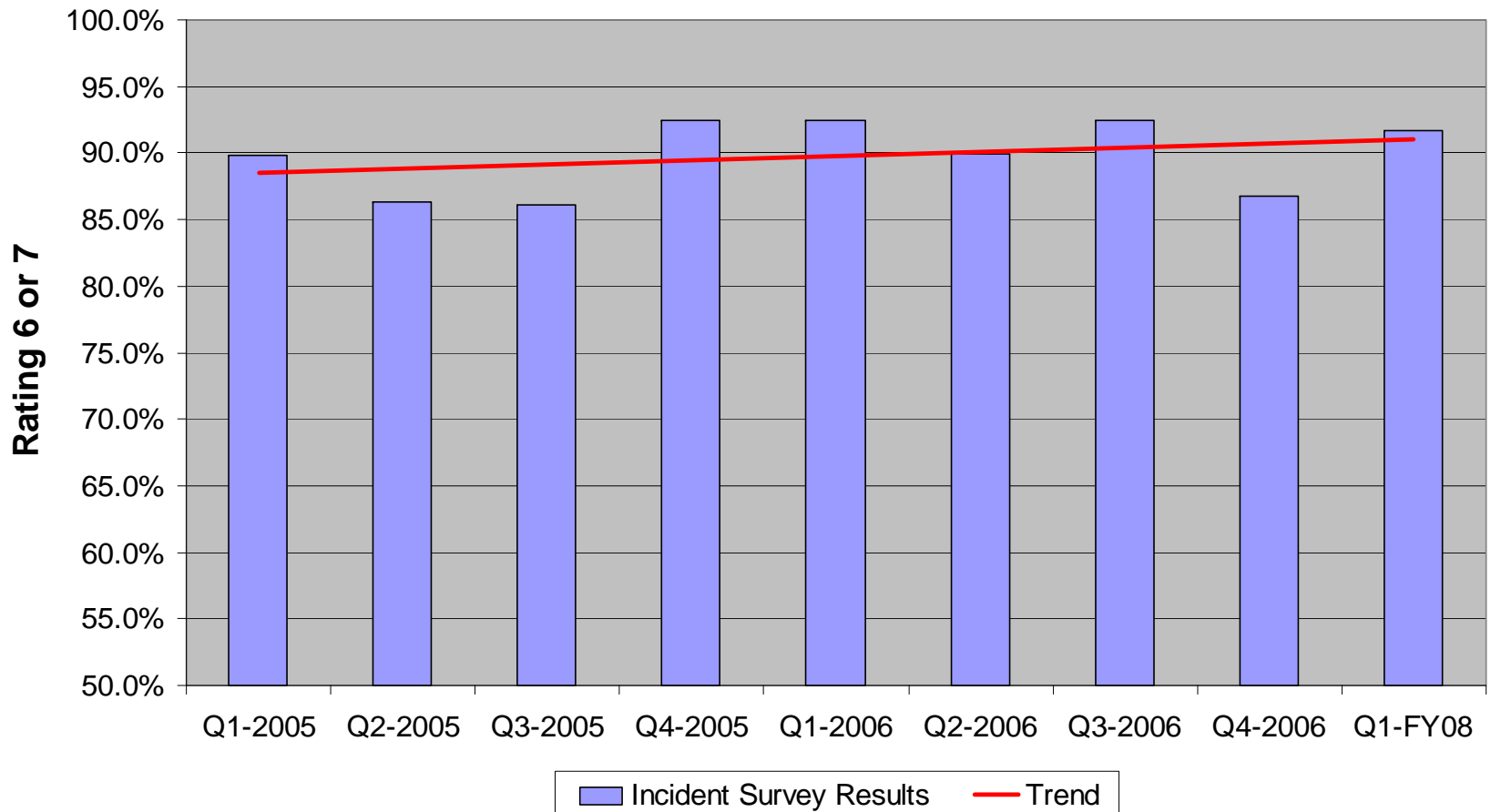
# Increased Web Traffic

## North America SupportNet Traffic



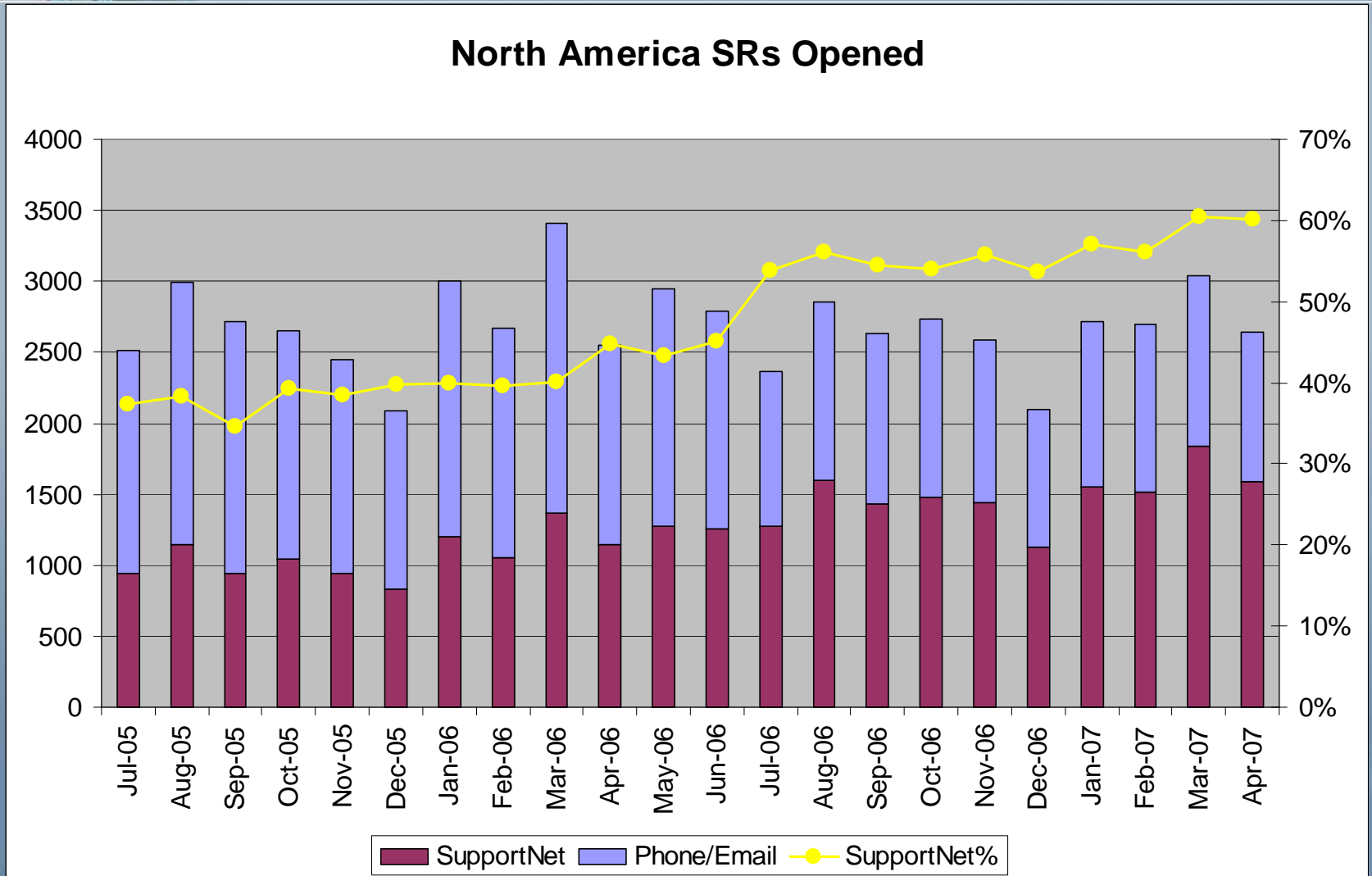
# World Class Customer Satisfaction

## North America Top Box Customer Satisfaction - Top Accounts





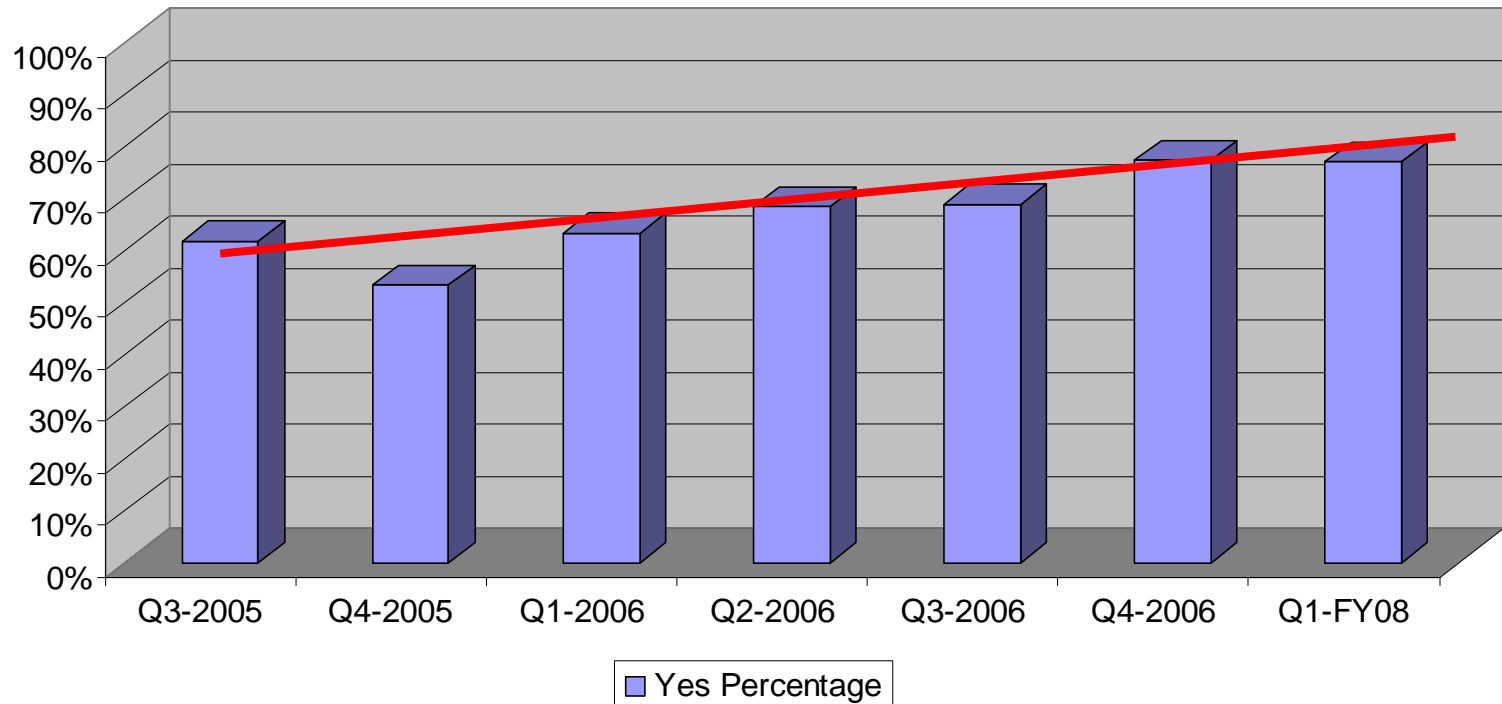
# Shift in Service Request Open Method





# Increased Web-Support Attempts

North America Customers Who Attempted SupportNet Before Opening SR



**Survey Question: “Prior to contacting Customer Support, did you attempt to resolve your issue by using the SupportNet KnowledgeBase?”**



# 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.*"

# 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
- You can motivate your teams to change:
  - Carefully shape the message
  - Include them in the planning
  - Provide training
- Measure, listen, adjust
  - Let the organization know what is important
  - Learn from customer feedback

# Questions?

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