Customer Care in a Unified World

Ed Romson
Senior Director
Plantronics Global Customer Care
Who is this guy?

- Apple Computer - 13 years
- Three Silicon Valley start-ups - “The dot.com years”
- Teletech
  - Project Management – 4 centers in the Americas
  - Operations Planning – 600 seat contact centers – Korea & Taiwan
- Rocair Corporation
  - Customer Care strategy consulting
  - External Professor – Universidad de Belgrano – Buenos Aires
  - Co-author – Call Center Management – Pradigmas Convergentes
- Experience in 26 countries
  - Expatriate tours in Japan, Singapore and the Netherlands
- Senior Director, Global Customer Care
Three Thoughts for Today

• Direct Knowledge works when direct support is not possible
• Your customers will tell you what they want, you just have to listen
• Govern globally, adjust locally
Global Customer Care Organization is Customer Centric

• The Plantronics Global Customer Care Department provides our customers and channel partners timely and accurate pre-sales information and post-sale support and service.

• Our customers and channel partners can quickly contact a human who is responsive to their needs and who will resolve their issue during the first contact.
Five In-house Customer Contact Centers
Customer Care Leadership

- Plantronics TAC is available 24 hours/day, 5 days per week
  - Speak to a live agent – no automated attendant run around
  - Measurements in place for call responsiveness and improvements
    - Customer Satisfaction > 85%
    - First Call Resolution > 75%
    - Average Speed of Answer < 20 secs
    - Case detail logging > 90%
Plantronics Mexico Technical Assistance Center
Nine Global Customer Care Service Centers

- Goal - <48 hour turn around from receipt of order to dispatch
However our customers want to contact us

- Answers to questions through on-Line self help service offered 24/7 – plantronics.custhelp.com
  – an extensive Knowledge Base of product information
- Email with a 24 hour turnaround of answers in 8 languages
- Live Chat available in English & Chinese (Spanish & Portuguese - Oct ‘12)
- TAC staff includes direct support in 15 languages – three way, interpreted, conversation available in 126 languages
Customer Feedback Leadership

The *voice of the customer* is heard loud and clear at Plantronics.
KNOWLEDGE IS POWER

Knowledge
Translations in fourteen languages

Now including Russian!!
Теперь включая русский!
KB is Integrated Into the Agent Console

- Increases use of KB by Tech Support Reps (TSR) during the call
- Increases accuracy and Customer Satisfaction
KB available in Fourteen languages

- Agent need not understand the language – toggle between English and ...
Agents can send articles or URLs

- Articles can be attached to the case (record keeping)
- PDF or URLs can be emailed to the customer
Benefits

• We extend our reach into countries where we cannot directly support our customers

• Our global customers can get help where, when and how they want

• Today’s customers (Gen X, Y, Z) are increasingly more comfortable with on-line self-service.

• “If you build it, they will come”
Can you hear your customers?
How do customers want to talk to us?

End Users

Sales and Internal Associates

Channel Partners

Phone

E-mail

Web Chat

Video

SMS
We survey in 11 languages

Case#: [Case.CaseNumber] Date: [Case.CreatedDate] Product: [Case.Product]

Thank you for the recent call you placed to Plantronics Customer Care relating to your request for technical support on a Plantronics product. We would like to confirm that your request was handled to your satisfaction. If you require any additional support for your product or would like information concerning the warranty on your product, feel free to contact us at 1-800-644-4600.

Plantronics would like to get your feedback regarding the last agent you spoke with on your recent call to Plantronics Technical Support. Your response will be crucial in helping identify Plantronics’ strengths and opportunities for improvement.

Your information will be used solely to improve the quality of our support: product offerings and will not be used for advertising, promotions or any other similar purposes. We value your privacy and want you to know that we will share your information with any other company for more information, please review our privacy policy.

This survey will take approximately 2 minutes to complete. To thank you for your time and participation should you choose to proceed, you will be entered in a random monthly drawing for a new Plantronics Voyager Pro Headset with Bluetooth® technology.

To participate, simply click on the link below or copy-and-paste the URL into your browser.

Click here to take survey
http://www.clicktools.com/survey?u=b41227f-9eb1e8888q1=1[Case.Id]&v=[Case.ContactId]&a3="[Case.Number]"

We thank you in advance for your time and candid feedback.

The Plantronics Customer Care Team

Dossiernummer #: [Case.CaseNumber] Datum: [Case.CreatedDate] Product: [Case.Product]

Bedankt voor uw recente contact met Plantronics Customer Care betreffende uw aanzpraak voor technische ondersteuning van een Plantronics product. Als u extra ondersteuning nodig heeft voor uw product of meer informatie wenst met betrekking tot de garantie van uw product, neemt u dan contact met ons op:

0800-752 6876.

Plantronics vraagt uw ervaringen door te geven aan de laatste gesprek met Plantronics Customer Care. Uw reactie draagt bij aan onze dienstverlening en het verbeteren ervan.

Uw informatie zal alleen worden gebruikt om de kwaliteit van onze technische ondersteuning en onze aangeboden producten te verbeteren en zal niet worden gebruikt voor reclame, promoties of soortgelijke doeleinden. Wij waarderen uw privacy en zullen deze informatie niet met andere bedrijven delen. Voor meer informatie, klikt u hier voor een overzicht van onze privacy policy.

Deze enquête zal ongeveer 2 minuten van uw tijd in beslag nemen. Uw reactie draagt bij aan onze dienstverlening en het verbeteren ervan.

To participate, simply click on the link below or copy-and-paste the URL into your browser.

Klik hier om de enquête te openen:
http://www.clicktools.com/survey?u=b41227f-9eb1e8888q1=1[Case.Id]&v=[Case.ContactId]&a3="[Case.Number]"

Wij bedanken u voor uw mening en uw tijd.

Het Plantronics Customer Care Team
What I see every morning over coffee
Weekly Survey Analysis Process

Feedback to TSRs

Analysis and call back – 1&2

Report to the Product Teams via VOC

<table>
<thead>
<tr>
<th>Created By</th>
<th>CT Overall Satisfaction</th>
<th>Overall Weekly result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addy MEDINA</td>
<td>0 0 0 1 3 9 13</td>
<td>92</td>
</tr>
<tr>
<td>Adrian BERRELLEZA</td>
<td>0 1 0 0 1 6 8</td>
<td>88</td>
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<tr>
<td>Alan GIL</td>
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<td>100</td>
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<td>Alejandra OLIVA</td>
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<td>Alexandre DEJESUS</td>
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<tr>
<td>Andres OBREGON</td>
<td>0 0 0 1 10 12 92</td>
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<tr>
<td>Angel CORDEIRO</td>
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<td>Cynthia HINOJOSA</td>
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<td>Daniel GUTIERREZ</td>
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<td>Eder CARBILIDO</td>
<td>2 0 0 1 8 11 82</td>
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<td>Ediane DACOSTA</td>
<td>0 0 0 0 1 2 3</td>
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</tr>
<tr>
<td>Erick SOSA</td>
<td>0 0 0 0 0 2 10 100</td>
<td></td>
</tr>
</tbody>
</table>
“Poor Person’s” Social Media

We are Here to Support You

Knowledge Base
Explore our solution database for answers to your questions

Instant Live Talk
Instantly receive a free telephone call from a Support Technician

Ask us a question
We will respond within one business day

Chat Live
Chat Live with a Support Technician

Call Us Today | 1-888-PLANTRONICS | 24-hour support available | Sunday 3pm–Friday 5pm (PT)
Governance is not a Dirty Word
IT Applications Governance—A Process Centric Approach

Steering Committee

Senior management team providing strategy guidance, budget/resource allocation, and highest point of escalation for portfolio decisions.

Global Process Ownership

Global Director/VP level process owner role responsible for driving standardization across the end to end business process.

Business Process Core Teams

Cross functional and global core team members responsible for the delivery of standard and optimized business processes.
World wide governance

IT (Base system, Licenses, Funding)

GCC Management and Super-admin (Change ownership)

(Assistance/ outside vendor management)

AMER (Ideas / testing)

Europe (Ideas / testing)

APAC (Ideas/ testing)
## SFDC Ideas

<table>
<thead>
<tr>
<th>Category</th>
<th>Title</th>
<th>Vote Total</th>
<th>Status Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Emails</td>
<td>Simplify and standardize &quot;Case Type&quot; choices</td>
<td>360</td>
<td>Great Idea!</td>
</tr>
<tr>
<td>New Emails</td>
<td>Simplify Emails</td>
<td>110</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Combining duplicate accounts</td>
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<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Country field</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Write in Symptoms and Solutions</td>
<td>80</td>
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</tr>
<tr>
<td>New Emails</td>
<td>Redirect Case to Specialist</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Better email management</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>On the Case screen, have the Product field filter the KB</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>setting adjustment</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>E-Support Functionality</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Search from inside a case</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Add spell check to the GCC Escalations section</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Copying Case information to accounts</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Subscribe to or create CC list for FSR's</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Product Managers notified if a CSI changes</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Product selection for FSR's</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Red Alerts - buried deep in SFDC only inside a case number</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>On the Case</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>New Emails</td>
<td>Automated Email Template Dispatch and tracking</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>
## Managing the SFDC ticket list

### Salesforce.com Global Customer Care CRs

Query: Configuration item = Salesforce - GCC AND State != Cancelled  
Sorted by: Number in ascending order  
Created: 2012-08-09 08:00:29 PDT

<table>
<thead>
<tr>
<th>Number</th>
<th>Short description</th>
<th>Priority</th>
<th>State</th>
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</thead>
<tbody>
<tr>
<td>CHG0032530</td>
<td>EMEA TAC Asset update request</td>
<td>P5</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0033660</td>
<td>Review Reports folder security</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0034886</td>
<td>GCC Ideas &amp; Ideas in Action / Project Tracking</td>
<td>P2</td>
<td>Work in Progress</td>
</tr>
<tr>
<td>CHG0034687</td>
<td>UBS Support Web-to-Case</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0034695</td>
<td>Creation of PDC Support Email-to-Case for Developers</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0034768</td>
<td>Capture Contact Address for UBS and Shell Support Web-2-Case</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0035019</td>
<td>Replace Country with Country Origin in Ask a Question</td>
<td>P3</td>
<td>Work in Progress</td>
</tr>
<tr>
<td>CHG0035168</td>
<td>Enhanced Person Account Lookup</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0035313</td>
<td>&quot;One Case per Issue&quot; - Log an Update Button</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0035421</td>
<td>Auto assign a Case to active User when an activity is added</td>
<td>P1</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>CHG0035871</td>
<td>Add &quot;Edit Person Account&quot; and &quot;Edit Business Account&quot; buttons for PCA</td>
<td>P2</td>
<td>Work in Progress</td>
</tr>
</tbody>
</table>
Best Practices Are.
## European Spares Process

### Spares and Accessories Requests Detail

**Spares Request-069986**

<table>
<thead>
<tr>
<th>Spares and Accessories Requests</th>
<th>Spares Request-069986</th>
<th>Status</th>
<th>Draft</th>
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</thead>
<tbody>
<tr>
<td>Case</td>
<td>02417005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Sea and Sky aviation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Joe Rossen</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Shipping Information

### Temporary Section

### System Information

- **Created By**: Edward Romson, 8/21/2012 9:49 AM
- **Last Modified By**: Edward Romson, 8/21/2012 10:13 AM

### Spare Products

<table>
<thead>
<tr>
<th>Action</th>
<th>Spare #</th>
<th>Product</th>
<th>Product Code</th>
<th>Requested Qty</th>
<th>Shipped Qty</th>
<th>Status</th>
<th>Oracle Order Number</th>
<th>Schedule Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0223</td>
<td>84588-01 (Battery Replacement WH500/W440/W740/W745)</td>
<td>84588-01</td>
<td>1</td>
<td></td>
<td>New</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Spares and Accessories Requests History

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/21/2012 9:49 AM</td>
<td>Edward Romson</td>
<td>Created</td>
</tr>
</tbody>
</table>

### Open Activities

- **New Task**
- **New Event**

No records to display
Three Thoughts for Today

- Direct Knowledge works when direct support is not possible
- Your customers will tell you what they want, you just have to listen
- Govern globally, adjust locally