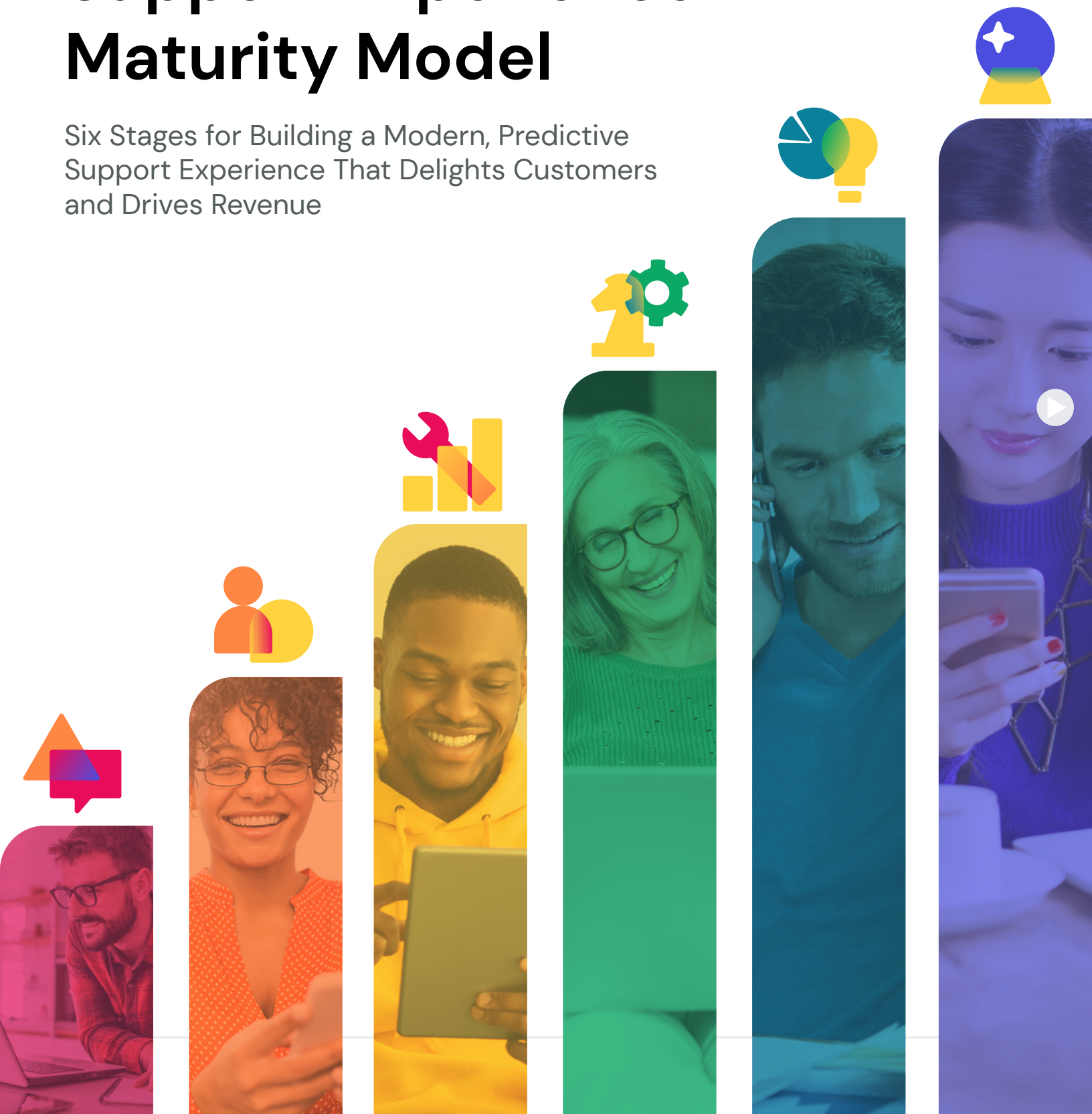
SupportLogic

The Definitive Support Experience Maturity Model

Six Stages for Building a Modern, Predictive Support Experience That Delights Customers and Drives Revenue



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Introduction

We are living in an "everything-as-a-service" economy. From music and coffee subscriptions to marketing and ERP software, experience supersedes capabilities for brand loyalty, retention, and conversion. But your relationship with customers is not driven by sales or marketing; it's driven by customer support.

Price and product features, or "speeds and feeds," have little bearing on customer retention. However, the service and support you provide are critical. **Support and services interactions account for up to 15-times the interactions of your sales team**, according to TSIA.[1] That's more than **90% of your company's engagement with customers, all managed by Support**. Furthermore, a survey by Zendesk found that **51% of B2B clients will stop doing business with your company for at least two years following one negative experience**.

With service and support having an outsized impact on revenue and retention in this everything-as-a-service world, ensuring a positive customer experience is critical, especially in support delivery. But to successfully transform support from an operational mindset to an experiential mindset requires a methodical approach. This transformation can be daunting, but its benefits and impact can be accelerated and sustained by taking a structured approach. A framework can be found in a maturity model, which provides both a means to benchmark your position and progress and guidance on how you can prioritize and advance your efforts, no matter where you're starting from.

90%+
of company engagement with customers is managed by Support

51%
of B2B clients will stop doing business with a company for at least 2 years after a negative experience

How to Use This Maturity Model

This maturity model guides you through an honest assessment of the current state of your support experience. **Here's how it works:**

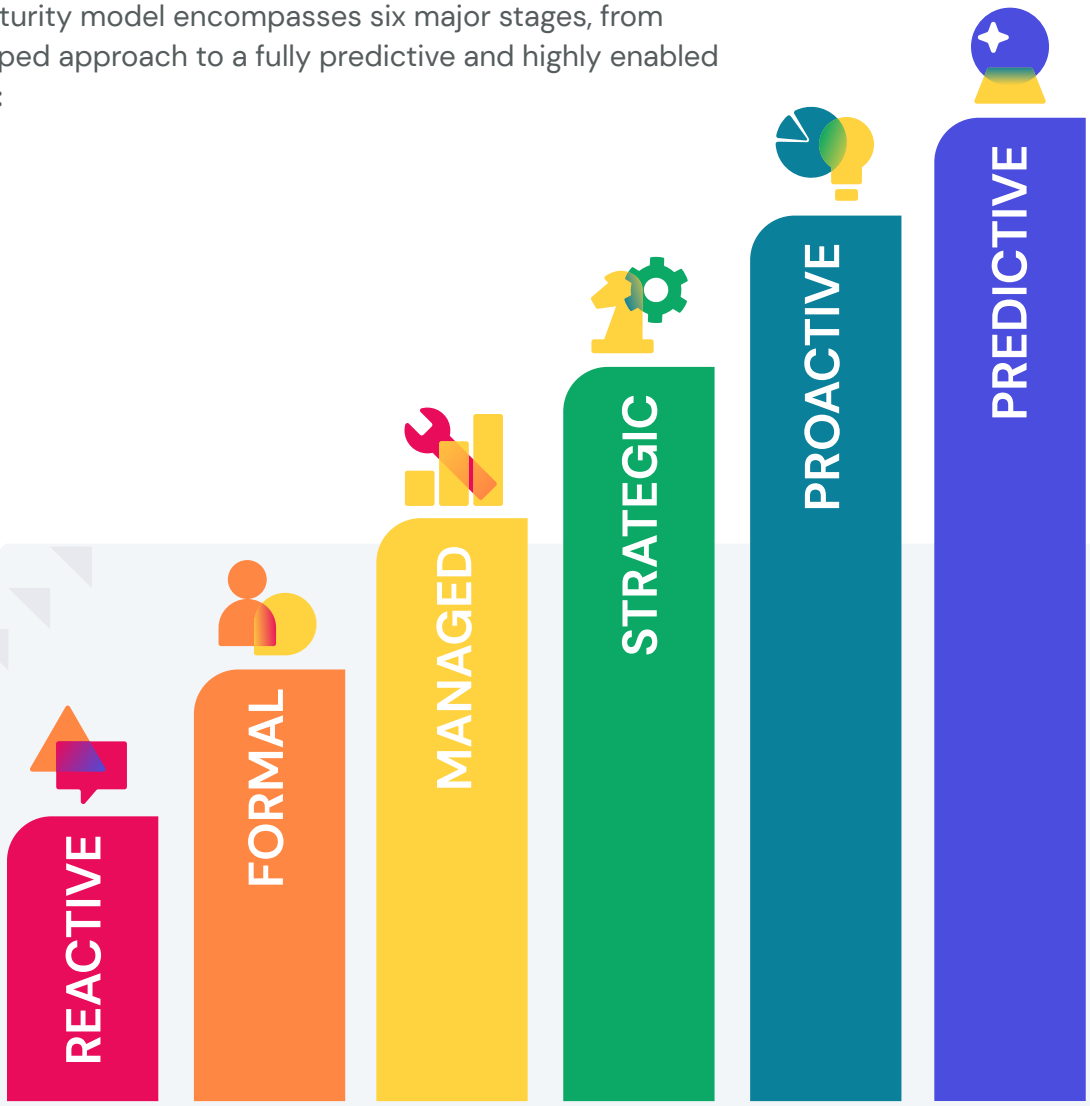
- Each of the six stages is described in detail, along with the technologies and tools needed to be successful at that stage.
- You then identify where your organization sits on this model so you can start to generate a strategy and plan for climbing the model's stages.
- The tools, technologies, and processes necessary for each stage provide a clear path for developing a more mature customer support experience, although you'll likely find your current efforts span multiple stages.
- Each stage offers actionable steps for moving to the subsequent stage
- As you progress towards a fully predictive and proactive support experience, you can also use this model to guide your c-suite on the effort and investment necessary to advance.

1. Source: TSIA, Touchpoint Calculus: Why Sales Can't Do It For Themselves, May 2017

The Customer Support Maturity Model at a Glance

The customer support maturity model encompasses six major stages, from a purely reactive, ill-equipped approach to a fully predictive and highly enabled approach. **The stages are:**

1. **Reactive**
2. **Formal**
3. **Managed**
4. **Strategic**
5. **Proactive**
6. **Predictive**



In the figure above, the stages are depicted left to right, less mature to most mature. The goal for support organizations is to move along the maturity path to a fully predictive, proactive support organization.

Each stage includes a description of a typical support experience and the accompanying strategy a company would likely have in place to guide decisions, investments, and goals. As an example, say you have an internal telemetry tool for analyzing server logs and provide customers with proactive support. However, you don't route and automate those communications using your CRM system. Instead, you track the support using a slow, manual, error-prone spreadsheet.

In this case, your telemetry tool is at a Stage 5: Proactive, Incident Driven approach, but your reliance on a spreadsheet keeps the overall process in Stage 1: Reactive.

How Maturity Scoring Works

Think of this customer support maturity model as a matrix, not a single score. You may score highly in some processes and still rely on early-stage tools, but your customers don't mind because your support experience is relatively fast and always friendly. High scores in some areas will only go so far in quelling customer requests, however, so organizations will find that reliance on early-stage tools slows their ability to scale and react nimbly to support challenges.

Each subsequent phase of the customer support maturity model builds on the last. You can pull your entire support experience ahead with an all-encompassing initiative or move different areas ahead for incremental impact. Qualtrics found that 89% of companies with significantly above-average support experiences perform better financially than their competitors. We hope this model will set your organization apart. Remember that, as your company scales and markets shift, this maturity model should change to reflect those influences on support, success, and the customer lifecycle.

Onward!

Stage 1: Reactive

Reactive support is typically the first an organization offers as it creates a foundation for support efforts. A resource or team is assigned the task of providing support on an ad hoc basis, but no dedicated resources are allocated because the caseload is relatively small.

At this early stage, product and engineering teams may want to monitor and be involved with incoming customer requests. Reactive support may interface directly with engineers for quick fixes. Formalized guidelines or processes regarding service level agreements (SLAs), hours to respond, and case tracking may not exist.

Strategy

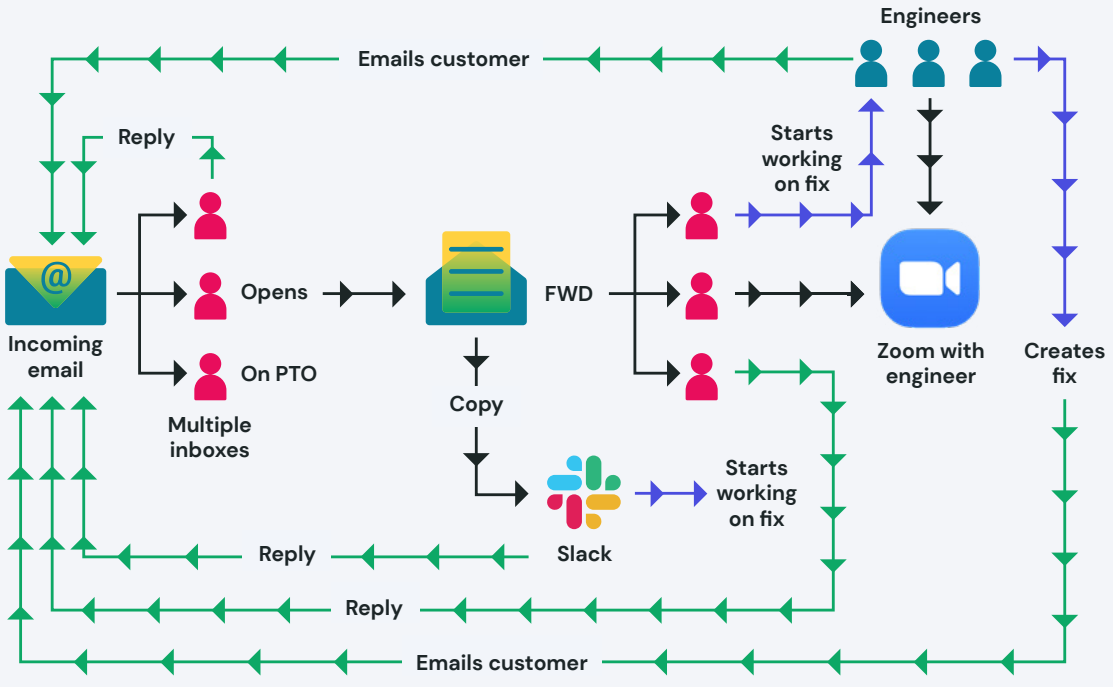
Reactive support arises from a desire or need to listen to customer feedback as your company grows and your offerings expand in scope and complexity. It's an "all-hands-on-deck" approach to support, with everyone from the CEO to the newest employee expected to pitch in. In this stage very little strategic planning is done to better meet customer expectations. Instead the expectation is, whenever a customer issue arises, it's everyone's job to respond quickly and move the issue to resolution, whatever it takes.

Foundation

- Email alias for support such as info@, customers@, support@, help@, or hello@.
- Spreadsheets or a bug tracking tool repurposed to track and manage customer requests.
- Engineering resources assigned to communicate with customers and resolve customer support cases.
- Sales or other customer facing teams may act as support or first point of contact.
- No structure or tiers to designate the severity of support tickets.
- No utilization of CRM to automate, manage, and retain communications.
- No dedicated support or support operations staff.

Support Case Lifecycle

- A case is created by a customer and sent via email to an alias monitored by many teams and individuals.
- An initial response is generated manually by the first available resource or coordinated via a collaboration tool such as Slack or Microsoft Teams. Coordination ensures visibility for Sales or another executive resource who can act as the customer's point person on the issue.
- For cases that result in a disruption of service, a wide range of company resources are put to work to aid the customer. This requires your workers to deprioritize existing commitments and put their attention to resolving the issues as quickly as possible.
- After resolution of the issue, the customer may receive a root cause analysis (RCA) report, but there is no formalized process for closing a case or asking for customer feedback.
- Cases that do not result in a disruption of service can often languish because of the lack of severity, importance, or customer value indicators. There is no formalized process to follow up with a customer nor automated alerts to notify teams after a set amount of hours or days.



One defining quality of reactive support is the two types of cases: critical and everything else. Critical cases have adequate resources devoted to solving them quickly. But this trains your customers to set things on fire to get a response, which leads to "support burnout." That becomes an even bigger issue because your reactive support staff — Engineering, Product, and Sales — are expensive, essential to other goals, and generally unprepared for, and untrained in, support interactions.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
We have a dedicated support team with known processes and procedures.	
We have a formalized and followed process for submitting a support case.	
We have formalized and followed processes for prioritizing a case as low, medium, or high.	
We have SLAs that are communicated to our customers for first response time.	
We have a CRM dedicated to Support and tracking issues.	
TOTAL	

Moving to Stage 2

What to do today to elevate your support experience:

- ✓ Assign an individual or group to manage incoming support cases. Build it into their role. Give them the time and resources necessary to succeed.
- ✓ Document how your support function works today to understand where challenges and inefficiencies exist.
- ✓ Evaluate your CRM system and its capabilities for facilitating and tracking support communications and tracking related metrics.
- ✓ Create and define tiers of support criticality.
- ✓ Create email templates and auto replies to scale support and process guides to create alignment on support expectations.

Stage 2: Formal

Putting even rudimentary processes, technologies, and objectives in place allows organizations to finally stop putting all hands on deck when a critical case is opened. Formalized support enlists a dedicated (but likely not a full-time role nor a job title that includes "support") resource to triage, manage, and respond to incoming customer requests. This process uses a set of technologies to track and manage replies and coordinate efforts. The resulting data can provide metrics to prove a ticket's prioritization. But even formal support still takes a "break-fix" approach similar to Stage 1: Reactive.

A formal support effort typically relies on a basic CRM system as its foundation, having outgrown spreadsheet-based management. Other simple tools, like a chatbot, may also be added. This encourages the collection of metadata related to each case, such as priority, SLA status, case status, customer entitlement, and product information. Of course, it also prompts conversations to explicitly define priority, SLAs, entitlement, and other terminology.

Unfortunately, the support team often works in a vacuum at this stage and must constantly coordinate and monitor cases as they progress through engineering, product, and other teams. However, with support being a separate and distinct function, they struggle to promote the product changes that could lead to fewer cases, a better product experience, and happier customers.

Strategy

Formal support is driven by the belief that metrics will increase Support's influence based on the information discovered via support interactions. Support is now being run as a line-of-business, where metrics like cases per agent, first response time, time to resolve, defect rate, and others are being monitored and reported. But support is also seen as a linear defense, where each additional case requires more support resources. Strategic management and operational efficiency are not yet considered, however, and support may even report into the engineering team and be driven by engineering priorities.

Foundation

- Rudimentary or inexpensive CRM.
- Chatbot or other minimal automated system as the first line of defense.
- Collaboration tools (Slack, Teams, etc.).
- Formal processes to create issues in Engineering's bug tracking tool (Jira, Trello, etc.).
- Dedicated workers assigned to manage incoming support tickets, but may also have other non-support responsibilities.

Support Case Lifecycle

- A case is created by a customer and sent via email to an alias directed to a CRM system which:

  > Logs the incoming information and creates a record of the email with connections to the proper customer and any pertinent information, such as SLAs, products purchased, versions, etc.
  >
  > Alerts support, engineering, sales, and other teams or relevant individuals to the new support issue.
  >
  > Sends an automated response to the customer notifying them that their email was received and providing insights into the support process.

- Support enters additional details of the case or prioritizations into CRM. Additional customer communications can be initiated and tracked via CRM. Support can link or attach the case record to internal communications as they begin collaborating with other teams.
- Support prioritizes cases using standard criteria.
- Engineering can view ticket metadata because CRM is integrated with bug tracking tools to pass category, customer, product, and other metadata and automatically track progress. This also allows for trend reporting and insights analysis to help inform priorities.
- After resolution of the issue, Support closes the case in CRM and the customer receives an automated root cause analysis (RCA) report.
- Cases of low severity, importance, or customer value remain active, open, and typically untouched, with automated alerts to notify teams after a set amount of hours or days elapse.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
We rely on our CRM system to track and report on our support process.	
We have established criteria for case prioritizations beyond priority level (severity, customer tier, product line).	
CRM is integrated with the other productivity and collaboration tools used in our support process (Slack, chatbot, email, telephony, etc.).	
We require minimal information to open a case and close it based on metadata.	
We have clear goals and outcomes, such as service level agreements (SLAs) and internal service level objectives (SLOs), that we hold ourselves to for every support interaction.	
TOTAL	

Moving to Stage 3

Moving from formal to managed support will likely see the first support leadership brought into the organization while also introducing a process for solving, addressing, and identifying product concerns before they become issues. This may involve the creation of customer advisory boards, web-based knowledge forums, public documentation, expanded "follow-the-sun" support, and even customer-level escalations. The move to Stage 3: Managed often sees the product team become more involved in learning from support cases, which leads to segmentation of customers and prioritization of feature improvements based on support requests. It also attracts more executive focus on Support's efforts and investments.

What to do today to elevate your support experience:

- ✓ Investigate the capabilities of your CRM system and take full advantage of any automation and integration features.
- ✓ Document prioritization levels and the criteria used to determine priorities.
- ✓ Meet with your product and engineering colleagues to better understand how support can gather helpful data.

Stage 3: Managed

Managed support uses the data collected across the support process to improve the process and inform product and engineering decisions. This expands Support to include specific roles and dedicated tools to manage and reduce incoming cases. Support is still viewed in terms of cost, but different support tiers are established to reduce costs and support complexity. This places additional emphasis on support metrics, improving them, and scaling support efficiently.

More tools are incorporated to reduce the workload on support teams. Customer forums, knowledge bases, and other self-service avenues can help, but they also require dedicated effort to monitor and fill with accurate, up-to-date resources. Support is also expanding to provide service outside of normal business hours, with 24x7 availability attainable with global resources and based on subscription tiers. **A Salesforce survey found that 67% of customers would pay more to get a better customer support experience**, and in Stage 3 this becomes a reality.

This stage is also when the approach to support gains more interest from executives. More management and processes are applied, but support is still seen as a cost of doing business. With more data and more investment required, executives want to see a return, so billable services are put into place and productized to deliver revenue streams.

67%

of customers would pay more to get a better support experience

Strategy

Support is changing from the activity of providing support to a dedicated team. It now relies on a formal, data-driven strategy for success, from defining roles and responsibilities to developing goals and objectives for the overall support function. It also forces the creation of support tiers to triage and manage issues of varying complexity so low-cost resources handle non-technical issues while higher-cost resources with more skills handle complex issues. There will be a structured handoff of issues from Support to Engineering, potentially with executive management playing a key role.

Support's strategy will also focus on achieving a combination of efficiency goals, such as reducing time to resolution and reducing the cost of support, and organizational goals, such as contributing to the product roadmap.

Foundation

- Establish internal support tiers to avoid low-value issues being managed by high-cost resources, thus reducing overall costs and increasing efficiencies.
- Visible executive support leads to more formalized processes, more budget for specific technical tools, and more demand for support data visibility across the organization.
- Customer-facing self-service tools established to reduce customer reliance on costly support resources.
- Continued formalization of the support-engineering handoff, with more executive involvement on goals, strategy, and process management.
- Multiple support centers established to increase around-the-clock support coverage.
- More reporting capabilities to handle increased visibility, executive inquiries, and budget justifications.

Support Case Lifecycle

- A customer-facing knowledge base is actively managed and updated. It is a customer's first resource before opening a new support case.

  > If unsuccessful, the customer creates a case in a customer portal where they can also see open and active cases and communicate with support resources.
  >
  > The case enters a rules-based routing system where metadata is captured and shared across systems, priorities and levels are automatically assigned, and alerts are communicated to the proper people and teams.

- Internal teams that collaborate with Support, specifically engineering and product teams, have SLAs in place and performance is regularly reported.
- Backlogged cases are regularly reviewed and actively managed until resolution.
- An internal escalation process exists but is only used in rare circumstances.
- Support teams are spread across different geographic locations to enable efficient and effective 24x7 support.
- Reviews of the customer journey are done regularly and include support.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
We have support tiers aimed at specific customer segments, and with ample differentiation and value.	
Support provides customers availability worldwide (24x7 or as expected by your industry).	
We have tools and processes in place for case deflection, knowledge management, knowledge-centered support, and/or communities.	
We have formalized processes and metrics around escalations, mean time to resolution, agent backlog, etc., and it is managed and tracked on a segmented basis to drive improvements.	
We have data and insights to encourage customers to renew their support contracts.	
TOTAL	

Moving to Stage 4

Moving from managed to strategic support is often seen as a maturation of the support organization to being an active interest of the executive team. Projects around digital transformation, modernization, and scalability begin to focus on the support organization. This shift introduces the involvement of customer success into support interactions, allowing for a more familiar and holistic management of difficult issues on a client-by-client basis. As customer success is integrated into the support experience new processes will initiate customer escalations. Organizations will also see a renewed focus on voice of the customer (VoC) initiatives, premier support programs, dedicated escalation teams, and churn prevention.

Strategic support is often viewed as customer-driven, with customers segmented into clear groups such as by size or industry. Specific metrics and goals are then determined for each of these groups. A tool like Gainsight, Strikedeck, or Totango will also be deployed to help monitor the health of the customer base and to provide customer satisfaction insights.

What to do today to elevate your support experience:

- ✓ Investigate the capabilities of your CRM system and take full advantage of any automation and integration features.
- ✓ Document prioritization levels and the criteria used to determine priorities.
- ✓ Meet with your product and engineering colleagues to better understand how support can gather helpful data.

Stage 4: Strategic

Strategic support gains executive-level importance, with the c-suite taking an active role in ensuring support is a key source of customer and company value. Support is also viewed as an investment that requires resources to improve but that can be more strategically managed based on data from support, engineering, customer, market, and other activities.

With support now being brought into the limelight, it's no longer seen as a cost center. Instead, support can now be a revenue generator. This increases the potential for investment as executives seek to fund organization-wide initiatives to drive efficiency and productivity gains, and support now enters those conversations. This "digital transformation" of support adds more tools and technologies, which makes support better, faster, and more efficient, and increases its profit potential.

Strategy

With backing from the executive team, often starting at the CEO, strategic support is focused on delivering customer value. Attention turns to VoC, customer lifetime value, digital transformation, and continued efficiency improvements. Dashboards are required to give executives updates on progress and performance, especially for support's impact on customer value, churn, and revenue.

82%
of support leaders are looking to shift to proactive support models

The focus also moves from the cost of support to the internal value of support, where churn is tied directly to revenue and growth. Along these lines, Gartner states that "**82% of support leaders are actively looking to shift to more proactive support models that directly drive revenue growth.**" Additional tools are required for support to increase its value, however, so investments are made in dedicated customer health, VoC, upsell signals, and customer satisfaction (CSAT) technologies.

The support team also grows to include dedicated escalation managers who work to maintain and improve customer health, keep strategic customers happy, and improve support metrics.

Foundation

- Customer health tools such as Gainsight, Strikedeck, and Totango are used to identify which customers are at risk of churn.
- Customer satisfaction tools like Medalia and Qualtrics are used to gather customer feedback and improve the customer experience.
- VoC initiatives bring more metrics and formalizes the gathering and evaluation of customer health, satisfaction, and feedback data.
- Partners present a way to reduce cost of support and the foundational work done in Phase 3: Managed plus the enhancements made in Stage 4: Strategic, allow for effective resolution of basic cases by partners through certifications, training, and documentation.
- Support leaders and IT begin to consider the growing number of technology tools versus manual processes and the potential for Support's digital transformation.
- With more attention, Support requires more reporting tools to convey trends to executives, analyze issues and cases across customers and products, and connect metrics to specific product lines or customer segments.
- More cost, budgeting, and financial tools are required to run support, but also to integrate with support metrics to develop detailed analysis of the cost and value of support.

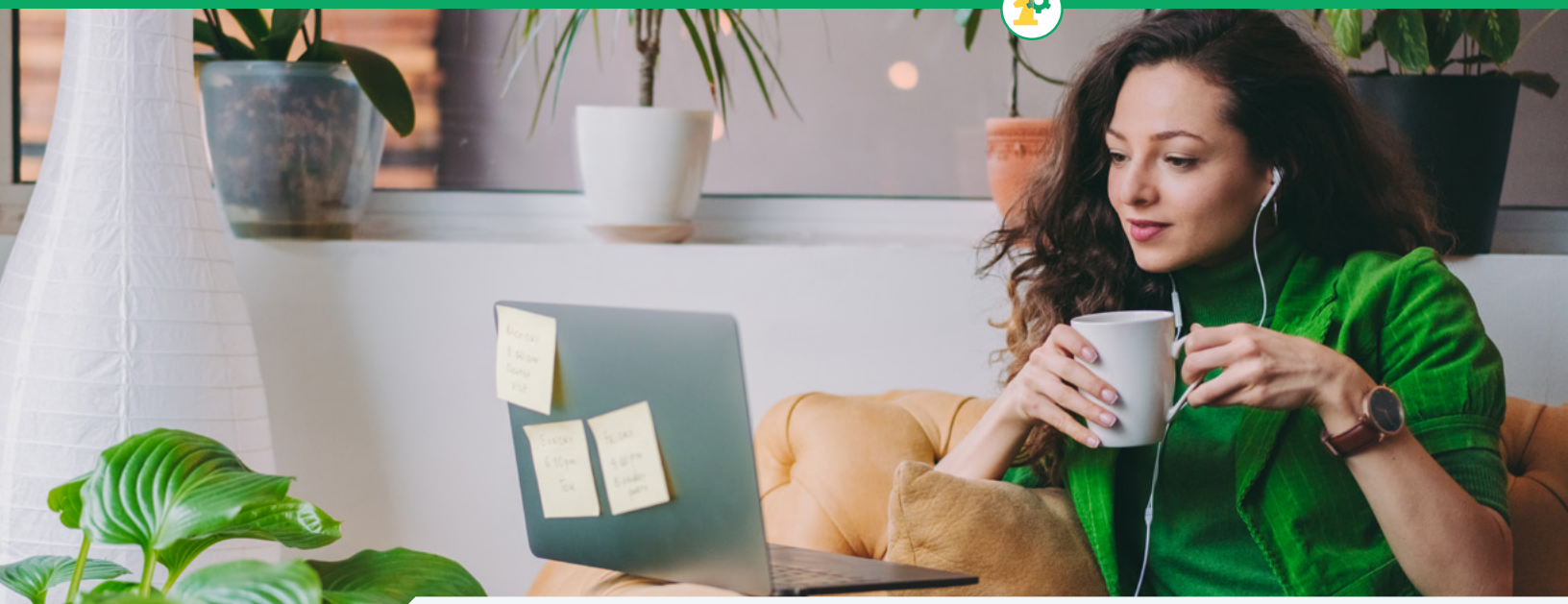
Support Case Lifecycle

- Customers will often speak to a named account manager or dedicated contact prior to opening a case. There may also be a partner portal or initial support interaction occurring before the official case is created and or transferred. Often there may be recurring meetings between customers and their account managers where the customer can discuss the issue. If, after some background research, a solution isn't identified, the account manager will request that the customer log a formal ticket or will do so on the customer's behalf.
- When cases do arise, the customer will often visit a web portal that highlights all of the cases open for their entire organization. This allows them to track ongoing issues and ensure duplicates do not occur.
- The customer will pre-populate metadata fields on behalf of the support organization to determine the SLAs via fields like priority and severity, while the system automatically populates details from CRM such as support subscription level and contact information.
- Once the case is created, routing is likely automated. This could be via a round-robin process or a more advanced or AI-based tool that automatically routes to the best agent based on factors like agent experience or skills,
customer industry, products in use, and others.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
We have a customer health dashboard, scorecard, or stack rank to help understand which customers are healthiest/happiest and which are churn risks.	
We have executive-level visibility (and funding) for initiatives being undertaken to scale support and create a more productive workplace.	
Support monitors and baselines revenue driven through support services and has clear Measurable Business Objectives (MBOs) for the team to strive towards.	
Clearly defined partnerships across various organizations, both internal and external. This can be for tier 1 support to be offered by partners, to have clear expectations of support to Customer Success, Product, and Engineering relationships internally.	
We have dedicated teams established for escalation management and premier tiers of support.	
TOTAL	



Moving to Stage 5

Moving from strategic to proactive support requires a connection between support and your customer success team. It broadens the role of Support to involve Sales for support escalations and to pitch premium support as a line item to customers. Support will also begin to segment customers and related metrics to align Support's focus to overall company growth goals across market segments. Research by Microsoft has found that **96% of customers say the support experience is important in their choice of loyalty to a company**, and companies at Stage 5: Proactive know this fact.

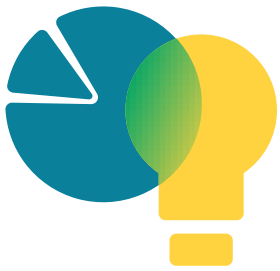
96%
of customers say the support experience is important in their choice of loyalty to a company

What to do today to elevate your support experience:

- ✓ Get funding allocated as part of your organization's digital transformation and VoC initiatives.
- ✓ Identify key support metrics you'd like to improve and determine what tools, processes, consultants, or best practices can help you do so.
- ✓ Make sure all of your existing initiatives allow you to collect data, which can then be fed into your CRM or another central repository to provide comprehensive insights.
- ✓ Work to put tools in place that allow for actionable workflows to occur. As you start to charge customers extra for support and formalize processes, there will be an expectation of measured improvement. Having workflows in place will ensure process scalability.

Stage 5: Proactive

Proactive support focuses on resolving issues as they occur by using data from internal systems or customers themselves. The goal is to see which customer needs help, maybe even before the customer knows it needs help. By offering greater value to customers, Support is now seen as a trusted advisor, often helping justify premium offerings. The move to proactive support will also see engineering resources start to live within the support team. This allows for proactive fixing of issues as they arise. With the continued investment into tools, internal executive pressure remains on Support to increase efficiencies, reduce costs, and improve profit potential.



Strategy

Proactive support relies on data analysis to help you recognize problems before they adversely affect your customers. Product and systems data is crucial, so investments must be made in embedded hardware and monitoring tools such as Splunk. Engineering will also become more involved with support to understand issues, quickly alert Support, translate them into proactive actions, and accurately communicate with customers. Engineering, on their side, will begin to prioritize issues based on the monitoring data so they can quickly find root causes and fix issues.

Support will also establish support levels to connect customer value with revenue and profit potential. Typical individual support levels such as silver, gold, and platinum will also heighten your customers' expectations as to SLAs and resolution times, which further pushes support to continue making improvements in key metrics. Since customers are paying, they obviously want better support.

Foundation

- Application performance monitoring tools like Splunk are required to actively monitor systems, alert engineering, and prompt fast, proactive action on issues before they impact customers.
- AI capabilities will be deployed to use system monitoring data to automatically alert customers and route related support cases.
- Engineering will integrate support data to gather metrics and improve prioritization and product roadmaps.
- With support levels sold as line items, Support will rely more on profitability and financial metrics and will be more responsible for equipping sales teams to upsell support levels.

Support Case Lifecycle

- Cases are created automatically on a customer's behalf thanks to monitoring software.
- The customer gets a message highlighting a service interruption or degradation without having to report the issue.
- When the customer comes to the support portal to create a ticket, the system will intelligently and instantly recommend possible help desk or knowledge base articles to deflect the case. The system will also list any of the customer's similar and currently open cases to avoid duplicates.
- The assigned agent will use case swarming and follow-the-sun support to ensure someone is always available to help while they act as the primary liaison.
- If an engineering ticket is created as part of the process, a recurring meeting or update cadence between support and engineering resources to proactively update the customer.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
Engineering has tools to track the health of customer deployments and to allow for proactive resolution of issues before the customer knows they occur.	
R&D or Engineering have a foothold in the support process and routinely work alongside Support to deliver enhancements and fixes to issues.	
We route cases using AI or other advanced logic to allow for faster resolution than a round-robin or manual decisioning system, and this system provides data to identify skills gaps and guide hiring.	
Swarming support cases is part of the company ethos, with multiple teams participating and sometimes even reaching out proactively to head-off issues.	
Support provides root-cause analysis to product and engineering teams to help prioritize product enhancements and plan product roadmaps.	
Instead of being only case-based when reviewing backlogs, we manage backlog by customer, product line, or other metric, and are moving away from case-based metrics.	
TOTAL	

Moving to Stage 6

Moving from proactive to predictive requires more analysis of application monitoring data to determine which signals can be used to predict issues before they occur. It's a very metrics-driven stage and relies on advanced analytics and AI, which also requires further investment.

What to do today to elevate your support experience:

- ✓ Create a role that allows R&D and Engineering to be involved in the support experience.
- ✓ Create a skills matrix to evaluate support engineers.
- ✓ Leverage internal telemetry and connect it to alerting systems like PagerDuty to create automatic alerts when system anomalies are detected.
- ✓ Establish processes to create a more skill-based approach to owning and managing support cases, with subject matter experts being brought in early and tactically to address issues without the customer having to request an escalation.

Stage 6: Predictive

Predictive support is the final stage, where customer, application, and other signals are recognized, and issues are prevented before they occur. This not only increases customer satisfaction, but it also eliminates potential support events and elevates the value of support from all perspectives. Within support, customer health metrics are also analyzed more intelligently to improve the customer experience and determine which customers might not be a great fit. Support is now seen as an exciting and valuable career opportunity, with career paths leading both into and out from Support.

Ultimately, CRM ceases to be an integral part of providing a great customer experience as the metadata in the CRM is obsolete when compared to the insights pulled from machine- and human-readable text. What's more important are the workflows and activities allowing organizations to intelligently connect activity to the right customers, products, and user groups.

Strategy

The goal of predictive support is to prevent issues before they occur. Fewer issues mean lower costs, happier customers, and more profitability. Predictive support relies heavily on unstructured data to identify the signals that point to potential issues, while also integrating information provided by customers to predict how customers will react and what they might need, or initiate actions that maintain or improve customer satisfaction.

In the predictive phase, workflows and alerts empower teams to collaborate to prevent customer churn. This data also moves to product and engineering teams to guide decisions on end-of-life planning for features that lack usage and adoption.

Predictive support is a rewarding career path. Top performers will rise to management levels or move beyond support into engineering, product management, support operations, customer success, or other teams. Support will also become an aspirational destination for those outside of support such as data science, analytics, and project management. As the support experience improves, organizations will view support as an extension of how they upsell. Support will spur new business opportunities based on insights from the signals within customer data.

Foundation

- More AI tools are required to analyze and leverage the increasing amounts of customer, support, application, and other data.
- Metrics drive more decisions, so dashboards, reports, and other insight tools are required for teams and executives across the company.
- Customers and internal employees stop working with metadata fields and instead have an easier time of interacting with each other, focusing on delivering more context instead of filling out more forms and fields.
- Support workers require clear employee development plans as more layers of management and diverse opportunities become available.
- Data is also used for experimentation across Support and Engineering.

Support Case Lifecycle

- The need to fill in metadata fields is no longer a requirement by the customer to log a ticket. Instead, cases are logged using human-readable text like an email, Slack message, or support forum post.
- Once a case is logged, AI analyzes past cases from the customer and individual reporter, reads case contents and assigns an agent based on skills, timezone, relationship, and current caseload.
- If an aging case is progressing behind a typical case of that style the AI will surface this case to support management and suggest candidates for swarming, reassignment, or expertise.
- Alerting of predictive and proactive support and success factors will be sent across the customer organization with analytics available in real time to monitor service degradations.
- Once the case closes, the customer may or may not receive a CSAT or Net Promoter Score (NPS) survey as the sentiment and customer temperature was being monitored all along using AI and natural language processing, resulting in a support health score.

Self-Evaluation

Rate your customer support experience on a 1-3 scale, with 1 being non-existent, 2 being partially implemented, and 3 being fully implemented.

	Score 1-3
We view support as a revenue center that generates value for sales, product, and engineering teams and helps to guide the direction of the company.	
VoC metrics are monitored in real-time to direct hiring decisions (skills, projections), prioritize engineering backlog, and predict end-of-life forecasting.	
Escalations are proactive and preemptive and managed across groups of cases or across a single customer segment (account escalations) to increase the efficiency of support.	
Support has defined processes to help flag customers who are likely to churn as well as customers who have opportunities for upsell.	
TOTAL	

Conclusion

This maturity model is a tool to assess where your support experience stands today and guide its evolution to a more proactive and predictive tomorrow. Moving up the maturity model is a constant process of improvement. Using the self-assessment as a starting point, you can gauge your organizations biggest needs, but always remember these should be aligned with the needs and pain points of your customers and those of your support agents.

Remember that support and services interactions account for more than 90% of customer engagement. Investing in the support experience is crucial to your company's growth and financial health.

For more information and resources on building a proactive and predictive support experience and support organization, visit www.supportlogic.com.

Maturity Model Scorecard

This scorecard offers a simplified assessment tool to evaluate your current support experience based on basic areas of effort, from deployed technologies to staffing strategies. Use it as a quick reference guide and to easily understand how the framework builds maturity in every area. Your current efforts may span stages, but your overall maturity will be apparent.

The five basic areas of support effort are categories loosely as:

1. **Technology tools**
2. **Insights**
3. **Support expectations**
4. **Support focus**
5. **Support staffing**

Stage 1: Reactive	Stage 2: Formal	Stage 3: Managed
• Spreadsheets • Basic reporting • No SLAs • No formal job titles • No formal staff	• Rudimentary CRM • Ad hoc metrics • Customer tiers • Documented goals • Dedicated effort	• Dedicated tools added • Executive interest • Self-service options • Cost reductions • 24x7 support

Stage 4: Strategic	Stage 5: Proactive	Stage 6: Predictive
• Health and CSAT tools • Executive dashboards • Value-driven support • Management tools • Expanding team	• App monitoring • Customer-focused data • Value-based tiers • AI-driven insights • Broader collaboration	• Predictive insights • Metrics drive decisions • Tiers drive revenue • Experience goals • Aspirational roles