



## Automation, Not Mechanization:

Take care of your customer while your support solution takes care of business

### Why Automate?

How many steps do you perform from incident submission to incident resolution?  
How many screens are toggled through just to record the initial submission?  
And how many communications are performed throughout the resolution life-cycle?  
Automate steps between open and close by allowing your customer support software to do them for you.

Many processes can be made more efficient with automation.

- ▶ Perform repetitive stepwise processes without missing a step.
- ▶ Initiate and complete tasks on schedule.
- ▶ Hit every milestone of processes requiring intervention at specific times.
- ▶ Automate simple tasks to free staff for the important work of caring for your customers.

Bringing efficiency to your customer service and support functions is as easy as that.

Incident management, alerts, monitoring, and reporting are a just a few of the steps that are simpler and more efficient with automation. Superior service at a time when hiring more staff is not feasible requires superior customer service and support software with automation capability.

### What is driving this need?

Businesses want to give the best level of service for the lowest cost meaning lower headcounts and lower budgets, even with dramatic increases in workload. Duplication of effort, slow responses, poor or lost documentation, and inconsistent escalation procedures are failures of the system that cost time, money, and customers. Businesses also want the efficiency of automatic task performance to decrease the need for human monitoring and intervention.

Customers expect a high level of service regardless of anything else a business does. They are brutally unforgiving of any perception of incompetence such lost

incident reports, failure to resolve issues in a timely manner, or a service level agreement violation. It has become extremely easy for customers to change providers of a product or service simply because there is so much competition for almost every business niche. A single bad customer service experience can cause them to terminate their relationship with you.

### A Couple of Considerations

Don't automate your way out of business. While email response, self service, and guided search can be of enormous value, some situations require more personal interaction to resolve. The customer needs a simple way to contact a live person at any time. Your automated processes must have that capability or the automation mandate will fail at the outset. The customer must not be delayed in receiving your personal support.

Extensive mapping and definition of your present processes smooth the automation effort. Before beginning the implementation, trace all of the workflows, enter all the steps, and interview all departments involved in any way with support. The solution is configured using these process maps to create responses keyed to your business needs.

Specific escalation or alert conditions

- ▶ Time intervals for periodic activity
- ▶ Assignment matrices
- ▶ Keyword recognition
- ▶ Service level information
- ▶ Steps to multi-part tasks with dependencies

To reiterate: automation of the customer service process should not devolve into a cold and mechanical system. Customers easily recognize automatically generated email or web portal responses. This type of interaction is universally disliked when taken to an extreme.

### A Solution:

Automating parts of the workload reduces error, reduces costs, and increases efficiency in any type of business. As the service quality rises, so does customer satisfaction and retention; an asset at anytime but particularly so in a challenging financial climate.

Automation of escalation procedures, email responses, incident updates, and alerts for trends and SLA violations bring organization, efficiency, and effectiveness to your customer service.

- ▶ Consolidate information input to a single application integrated into the system.
- ▶ Enter all needed information once shortening the submission process and speeding resolution.
- ▶ Track all information including Service Level Agreements (SLAs).
- ▶ Handle routing, escalations, and prioritization according to preset business rules.
- ▶ Receive automated reporting of metrics for operations management and trend monitoring.
- ▶ Integrate this information into communication channels for customer interaction such as email and web portal interactions.
- ▶ Integrate other tools into the system: knowledge bases, billing, service level monitoring, and others.

Automation is an excellent method of monitoring trends and SLAs. If a particular issue is presenting more frequently or a product is generating more service requests than expected, an automatic alert allows intervention much quicker than performing trend analysis once a month. In the case of SLAs, automation provides a timely alert when a violation is imminent. The same type of automation can be used to track customer accounts to give alerts and messages according to preconfigured parameters.

### PhaseWare Does All This and More

PhaseWare's Event Engine is a solution that automates many of the processes for customer service and support. Event Engine automates:

- ▶ SLA compliance checks and tasks through alerts and thresholds.
- ▶ Detection and escalation of high priority or critical issues.
- ▶ Incident management
- ▶ Reporting
- ▶ Assignments
- ▶ Email responses
- ▶ Customer and management updates

Event Engine integrates with PhaseWare Tracker, offering a single point of entry for information, keeping it at your fingertips, and monitoring your customer data and activities for automated actions.

Efficiently serve your customers without increased staff.

Receive all the benefits offered by the automation capability of PhaseWare's Tracker and Event Engine integrated solution.

As a plus, obtain the additional benefits of scalability, flexibility, and ease of use coupled with the simple but elegant power of PhaseWare.

Go to [www.PhaseWare.com](http://www.PhaseWare.com)

Or call 866-390-3492

Demos are available

### About PhaseWare, Inc.:

Offer 24/7/365 customer support. Communicate with your customers through multiple channels. Never let another incident fall through the cracks. Take control of your incident management process with PhaseWare.

PhaseWare provides simple yet sophisticated customer service and support software that will grow with your business.

- ▶ Centralize information on customers, incidents, and service level agreements.
- ▶ Automate alerts, tasks and escalations according to predetermined business rules.
- ▶ Harness customer self-service technology.
- ▶ Communicate by phone, email, chat, forums and more.

Our comprehensive customer support management software is powerful, intuitive, and affordable. We deliver powerful, intuitive, affordable customer support software on-premise and on-demand.

PhaseWare: Incident management, customer management, and knowledge management made easy.

PhaseWare is based in McKinney, Texas, part of the Dallas-Fort Worth Metroplex.