Navigate Staff through
System decisions and actions

The background

When a global SAP implementation consulting company was awarded the contract to support SAP across a large South African mining company, they were asked to find innovative ways to reduce the costs of end user support.

The traditional support model involved trained SAP experts performing as contact centre agents, answering end user support calls. This not only required the training of people in SAP, it required them learning all client-specific policies, procedures and system configurations. The cost of this training and the lead times to get new agents competent to answer wide ranging SAP calls meant that the pressure on the few experts supporting second tier calls was significant.

And it limited the company's ability to improve service levels while lowering costs. In fact, the pressure from the operational team was to increase not decrease the resource budgets in order to ensure service level agreements could be met.

What was required was a way to somehow bottle the diagnostic logic contained within a few of their experienced SAP experts heads into a SAP Navigator. This SAP Navigator could then be used to guide agents through any call, diagnosing the specific user's situation, and identifying relevant solutions without the dependency on the agent's SAP knowledge. And once validated, the SAP Navigator could ultimately be offered directly to end users so they could self-solve, lowering the number of support calls due to improved self service.

The business challenge

Maintaining support staff's SAP knowledge levels. While formal training ensured a certain level of SAP and business knowledge, the support centre found that agents tended to forget details when they were not being required to answer those queries regularly. The result was that agents struggled to recall less common service query types, and simply second tiered these to the experts. This second tier was at times over 50% of calls received, and regular and costly training sessions did not seem to fix this issue.

Staff turnover. The nature of the call centre business is that there are relatively high staff turnover rates. The cost of then training and up-skilling new agents in both SAP and the client's business processes added significant costs, and reduced responsiveness to fluctuating call volumes.

Call out costs. When the service agent and their supervisors were unable to resolve a user's problem, an onsite support person would need to be dispatched. Having to offer onsite support to cover for issues that most often could have been solved if the right person had dealt with the call, reduced the consultancies ability to contain costs.

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The technical challenge

Improving support content quality and ability to search within the knowledge base. While ample documentation was available to users, few bothered to read the content in an attempt to self-solve. The reasons offered ranged from laziness to the fact that content was generic and relied on the user's interpretation skills to work out how it applied to their specific situation. It was just easier to call.

Offering smarter onscreen help. This included offering access to simulation examples or on-screen guides that walked the user through the system steps. While helpful, it was found that knowing the system steps was seldom the issue. It was making the right decisions within each step where the challenges lay i.e. when context mattered.

Offering decision tree guides. These tried to guide users through a structured decision-making logic, and while helpful, again failed to offer the level of contextual relevance to really solve specific problems. And given the contextual limitation of decision trees, maintaining changes when variables increased made it unworkable.

The challenge was therefore to capture the multi- dimensional, contextual logic experts use to diagnose different situations, and then to make very specific decisions. Simply offering documented support, generic simulation examples or step guides did not solve this problem.

The requirement

The management team was looking for a solution that would deliver on the following key requirements:

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- ⌃ Guide user through system actions in line with business processes

- ⌃ Track advice for compliance and analytical purposes.

- ⌃ Offer specific advice to specific user queries i.e. diagnose the users' specific situation and offer targeted, not generic advice on what to do

- ⌃ Be accessed by users as they perform on the system (option of user self service)

The solution

After reviewing a number of online system help, knowledge systems, and simulation tools, CLEVVA was chosen as the ideal solution. This was largely due to CLEVVAs ability to offer users contextually-relevant support at the level of any super user or system expert. A small team of approved CLEVVA authors then worked with the project team to rapidly capture all the diagnostic logic that the system experts were applying to all required system processes, and to make all known system-related decisions. The build process was agile, ensuring that targeted processes and decisions were captured and released for testing and optimization.

The resulting solution was accessed by the contact centre agents via an icon placed in their taskbar, and the SAP Navigator was viewed via a Stay-On-Top floating window that allowed them to work on their CRM screens while accessing guided support. The logic helped agents diagnose any system query without requiring them to have detailed SAP experience, and to resolve calls without having to second tier calls to an expert. Agents were given access to their SAP Navigator at the start of their training, highlighting that their role was to facilitate effective service conversations while the SAP Navigator's role was to ensure the right answers were found in the shortest time frame possible. The more agents practiced fielding calls, the quicker they realized how effective the SAP Navigator was, and soon they were fielding any query without worrying that they did not know the answers themselves, but could rely on their SAP Navigator to find them.

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1. **Reduced agent training**. Agents were simply taken through the key concepts (the WHAT and the WHY of SAP and the various procedures) before then being guided through the HOW using exercises supported by the SAP Navigator. This meant that learning times could be reduced by over 40%, as users were taught to self-solve right from the start.
2. **Reduced staffing costs**. Once users were live, they were able to refer to their SAP Navigator whenever they got stuck – as this is how they had learned in the first place. As a result, they were less dependent on external support, freeing up super users to target more complex support issues.
3. **Improved first call resolutions.** The fact that agents could now answer more calls with less reliance on their memory or SAP knowledge, ensured that first call resolutions rose steeply.
4. **Reduced errors.** Given that the SAP Navigator was capable of diagnosing the users specific context and then applying the relevant decision rules in recommending a solution e.g. what invoice code do I use in this situation?, fewer mistakes were made.
5. **Improved service levels.** Given the improved first call resolution rates, and the agents focus on the customer conversation and not the SAP content, users reported improved service experience across a number of CSI measures.

In addition to the above benefits, the company also had the option of rolling out the logic directly to end users in order to offer them an intelligent self service option as well.

The benefits

The SAP Advisor, built, maintained and deployed off CLEVVA, ensured that support centre agents were not only able to field more call types, but were also able to resolve more queries first time, with less training and less support.

By offering a SAP Advisor at each user's fingertips, the company was able to reduce user anxiety and improve overall system adoption. In addition, the hidden costs of post go live support were significantly reduced simply by offering every person real time access to answers they needed in order to get their jobs done.

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