



# Trane Digital Support Team

Leadership and Persona Interviews – UX Summary Report

- Project History
- Project Scope
- Executive Findings
- Persona(s)
- Digital Support Ecosystem
- Business Analysis, KPI's and UX Recommendations
- The Value of Customer Support Best Practices



Q1 2020

| UX Research: Dave Fleming, Sr. UX Strategy



An Overview of Trane Support and UX History

# **DEFINE THE PROBLEM**



## Project History and Focus (1 of 4)

Due to a number of challenges last year, spilling into this year's reorg transition, the initial report had some information gaps and vacation challenges at the end of last year. Those issues have now been resolved. Some of the other challenges included: taking on too many UX projects, changes in Support Leadership, UX Leadership changes and the pace of the Zendesk rollout.

All that said, the wrap up of these interviews has given me with enough information to combine the learnings from my original Support Leadership interviews and combine that with the Support Best Practices insights that I've gathered from Nielsen Norman reporting and from recent Forrester consulting.

## CONTEXT

When I first came on board this project, the research focus was to create a "Support Agent" Persona. Working with Jason, the UX Manager at the time, it was agreed that I would need to do some preliminary discovery to ensure that I was getting the right people to interview and the right context overall. **After the initial Stakeholder/Support Leadership discovery took place, I was able to learn more about the general direction Support was going and got their help in identifying the ideal employees to interview for the Persona.** The names and roles on that list were the best estimates by the Support Leaders at that time, indicating who they thought would best fit into the future-state vision for the Technical Support Engineer persona. That vision was set in motion by the support leaders at that time and became documented in the subsequent Support Leadership presentations, with the latest being Jan 2020. I also studied the TDS Support information on Confluence, depicting the history of Trane Support, compared to their future state aspirations, including Zendesk benefits, goals and implementation strategies.



## Project History and Focus (2 of 4)

What we have learned since the inception of this project, is that those original estimates included support roles comprised of support satellite team members and admins who don't all fit so neatly into one persona role. As a result, our next steps will require another phase of discovery research focused on **the overarching goal of trying to define the Support Ecosystem**. This will require a few meetings to help us define and confirm who the various support teams are, what the workflow looks like now, how that workflow will work best within Zendesk integrations, and lastly, how all the teams in Support can become aligned with what the organization has learned about keeping in step with contemporary best practices in customer service support.

In this type of foundational UX Research, I try to avoid boiling the ocean with numerous in-house studies and instead, attempt to fill in the gaps using IT studies that have already done the heavy lifting on the research and have already figured out what contemporary best practices look like for Customer Support. **These resources provide a solid framework of quantitative, qualitative information and analytics, bolstering our understanding of how and where Customer Support improvement impacts the bottom line for Trane revenue.** This obviously gives us the ability to assess the business value of Support and compare it to the other Trane research priorities.

The reason that I turned to Forrester reports, Gartner articles and Nielsen Norman studies, is because their research is based on literally 100's of global companies and competitors, shedding light on current BI insights, analytics and other key facts – including UX/CX advocacy. Highlights from those studies are outlined in the Value of Customer Support section.

## Project History and Focus (3 of 4)



Coupled with the insights that Trane UX research brings to the table, we can now begin to improve Support Services, informed by what we now know are industry standard baselines of Customer Support excellence. Those goals are also reflected in the CX principle we often describe as, “Start with the customer; stay with the customer.”

Historically, this Trane Support ecosystem has not been clearly defined in terms of studying the all roles and workflow. Therefore, this UX research has been a good first pass, revealing the need to conduct Customer Journey Mapping and Service Design to learn more about the leaders and people serving in support, as well as understanding more about the people served, i.e. our outside customers and our internal Trane employee “customers.”

Working with Trane leadership, UX can be help in a number of significant ways to help improve the support organization, improve the integrated workflow, improve the usability of all interactions, and become an integral part of support strategy as Trane continues to provide a world-class experience for our customers and our team members. The proposed UX recommendations along with UX KPIs, are documented later in this report.

To ensure that we are paying attention to the business side of things, Forrester has provided continuous, free consulting during this project, and has shared some of their insights on how to employ the use of quantitative metrics to measure the value and success of Customer Support. That formula looks like this:

*“We intend to transform our customer experience to increase customer-generated revenue while reducing customer-related expense, which will bring \$X of incremental benefit, at a cost of \$Y, for an ROI of Z%.”*

So that’s complicated KPI-speak, but it does result in increasing our bottom line in revenue overall.



## Project History and Focus (4 of 4)

Lastly, if we are going to stay aligned with the best User Experience standards for our customers, then we should provide a baseline foundation of UX/Support solutions, including the following:

- Customer/User Help
- Customer/User Feedback that is actionable and dependable in the outcomes
- Self-Service enhancements
  - Self-Help Guides and Videos
  - Improved forms and process
  - Knowledge Center or Zendesk Help Center
- Chat that offers 1:1 agent conversation as well as Chatbot interactive FAQs that enable people to drill down on specific categories of help
- **Cyber security strategy, design, and deployment**
- Taxonomy sessions to guide the architecture of the future state Zendesk/Trane Help Center
- User Interface design that provides usable, useful and desirable experiences
- Regular Usability Testing during the expansion of Zendesk Integration

It is important to call out that an end-to-end Support Services study would be the ideal research strategy – time and budget allowing. This would include the normal approach of baseline Experience Mapping followed by Persona interviews and creation, and then validation of the Customer Journey Maps for each of the Personas. This would finally get us closer to defining and designing a world-class support solution that we can benefit all – and add to Trane’s bottom line revenue goals.

Purpose, Areas of Research and Target Audience

# **DISCOVER: RESEARCH SCOPE**

# Project Scope



## Methodology and Format

- UX Discovery research
  - Review of existing documentation
    - 2019 Future State Goals – Diagrams and presentations
  - Trane Digital Support Team, SME input
  - Customer Support Best Practices Research
    - Forrester consulting
    - Nielsen Norman – BP Report
- Interviews
  - Stakeholders/Support Leadership - 5
  - Trane Technical Support Engineers – 12
- Ecosystem Diagram
- Discussion and Discovery session

## • Personas

- **Technical Support Engineers**
- Trane Digital Customers
  - External Customers
    - (Contractors?)
  - Trane Employees

## • Audience

- Trane Leaders and Managers
- Trane Connect Developers
- Trane Connect Product Owners
- Trane Marketing and Analytics
- Trane Engineers
- UX Strategists and Researchers
- UI Designers



# Project Scope (Cont'd)



## Support Leaders and Trane Directors

- Tracy Scobba
- Pete Salisbury
- Paul McMurphy
- Susie Gornick
- Amy Hughes
- Jason Kleckner (Ex-UX Director, supervising at the start of the project)

## Deliverables

(as confirmed by Jason K., 2019)

- Persona creation
- Ecosystem diagram
- Summary Report / Executive Findings
- UX Recommendations

## Content

- Executive Findings
- Persona(s)
- Digital Support Ecosystem
- The Value of Customer Support Best Practices
- Business Analysis, KPI's and UX Recommendations

## Insights

- Insights from the Stakeholders and first tier support team members and managers
- Persona: Technical Support Engineer
- Support Ecosystem - overview
- UX Recommendations for improving Customer Support
  - Zendesk Integration
  - Self-service goals
  - Alignment with UX and Customer Support Best Practices
- Quantitative/qualitative value of Customer Support
- Customer Support Best practices



Technical Support Engineer

# **EMPATHIZE: PERSONA RESEARCH**

**Start with  
the  
Customer.**

**Stay with  
the  
Customer.**





# Persona Trane

## Technical Support Engineer



### CHANDA BHAVSAR TECHNICAL SUPPORT ENGINEER (TTSE)

Assisting the Trane Connect user community as well as customers globally of Trane. Chanda focuses on software troubleshooting, multi-channel communication, Help Ticket stage, and restoring personalized customer support issues. Her primary responsibility is to act as a first-tier responder, using Zendesk, and assist people calls to get the job done.

**BACKGROUND:** With a degree in Computer Science, Chanda has advanced skills and first-hand experience working in her previous job as an Oracle Database Engineer. Her last job in a support role has prepared Chanda for the rigorous demands she faces in her Technical Support Engineer role at Trane.

**ENVIRONMENT:** Chanda often starts her day in an open workplace where rows of desks define the various teams and software projects surrounding her space. Her typical hardware includes a laptop, several monitors, and a smartphone. This is where she reviews incoming tickets, answers emails and begins to troubleshoot the incoming Help Requests. Working with the recently implemented Zendesk support system can be challenging, but her Support Managers and highly collaborative team help her get up to speed and keep in step with the evolving methodology and processes.

#### SKILLS & CAPABILITIES:

- Knowledgeable about customer service and scaling systems
- Comfortable with highly technical issues, computing systems, and office/web applications
- Skilled at managing and organizing work against Service Level Agreement (SLA)
- Familiar with Trane Engineering Team workflow and challenges
- Skilled with a variety of communication channels, i.e. email, phone, chat, texting, and mobile
- Capable of handling outage and deployment announcements

#### MOTIVATIONS:

- Sense of accomplishment helping customers and team members
- Participating in a Green Industry
- Being there for her team mates
- Personal best achievements

#### CHALLENGES

- Staying current with evolving global technology
- Managing the demands of ticket triage and escalation
- Zendesk integration
- Guiding customers to self-service opportunities
- Resolving when customers aren't till out online forms
- Locating the best Trane engineers to handle unique field issues

#### Goals:

1. Process TT Help Tickets in a timely manner
2. Resolve customer issues as efficiently as possible
3. Engage in positive feedback to resolve SLAs



38% Escalating Incoming Tickets  
48% Triage & Troubleshoot  
14% Resolving Issues

#### IDENTIFY ISSUE

- Review support requests in the queue
- Identify the key details
- Identify gaps

#### TRIAGE TICKETS

- Route the ticket to the best resource
- Attach docs and make notes
- When the ticket requires a Product team member or a Product Owner, send the ticket to them

#### TROUBLESHOOT

- Using their core knowledge, assess the best way to keep the resolution flow moving forward
- Take steps outside of the standard support guidelines when required

#### RESOLVE ISSUE

- Close tickets
- Take follow up steps where required
- Schedule customer follow up steps, or assign another team member to take that step.

# Persona Trane (2019) Property Manager



## HELEN ROPER

### PROPERTY MANAGER

Helen is the Property Manager for Triplex Company, a company that owns multiple office buildings and leases them out to tenants. Helen's primary responsibility is to keep her employer's occupancy rate high since empty space doesn't pay the rent. Tenant office spaces need to be competitively priced and offer the right amenities. Helen also seeks to provide excellent customer service to current tenants, because tenant retention is key to ongoing profitability.

**BACKGROUND:** Helen has a degree in business administration. She took a job with a property developer out of college and discovered that she enjoys the varied challenges of property management. Helen has no background in HVAC but has learned a little about events and schedules on the job. Her Building Engineers (BEs) do most of the work with the HVAC system, but since her best engineer is thinking about retiring soon, Helen knows that she might need to learn more.

**ENVIRONMENT:** Helen often starts her day in a cluttered office in a small office in one of the buildings that she manages. This is where she answers emails and dispatches work items from tenants to Building Engineers (BEs) and to other staff or vendors. However, more often than not, she can be found at one of her other buildings, talking to tenants or overseeing work on those buildings.

**INTERACTIONS WITH PEOPLE, PRODUCTS AND SERVICES:** Helen manages tenant contracts and relationships. She is the source of information about normal hours, after hours costs and restrictions, as well as, who in the tenant organizations has access to requests. She is also the first point of contact for work orders. She assigns them out and communicates with the tenants. She works with the Trane Account Manager (AM) and Trane Control Systems Service Technicians (TSS) to be sure that the HVAC system is set up properly to reflect tenants' building usage.

Helen's organization is small enough that she has also taken the time to learn a bit about her Building Automation System (BAS). Her building engineers are less comfortable on computers than she is, so she often deals with the work orders that require system changes, like scheduling changes and setpoints. For anything requiring knowledge of the equipment, she gets her Building Engineer (BE) involved. For anything requiring system knowledge, she contacts Trane. She knows that there's more to her base system and that she could get more out of it if she were trained, but since it's not her primary job, she doesn't find the time.

#### SKILLS & CAPABILITIES:

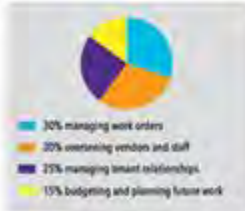
- Knowledgeable about tenant contracts, including competitive knowledge
- Comfortable asking for help and delegating work
- Has some familiarity with BAS systems/controls
- Comfortable with computers and office/web applications

#### CHALLENGES:

- Aging workforce of knowledgeable building engineers (and employer's unwillingness to make the long-term investment to train the next generation) causing a shortage of workers
- Difficulty getting investment in new technology or equipment (because the payback period exceeds the expected ownership of the building)
- Managing a portfolio of multiple buildings means that onsite access is a must

**GOALS:**

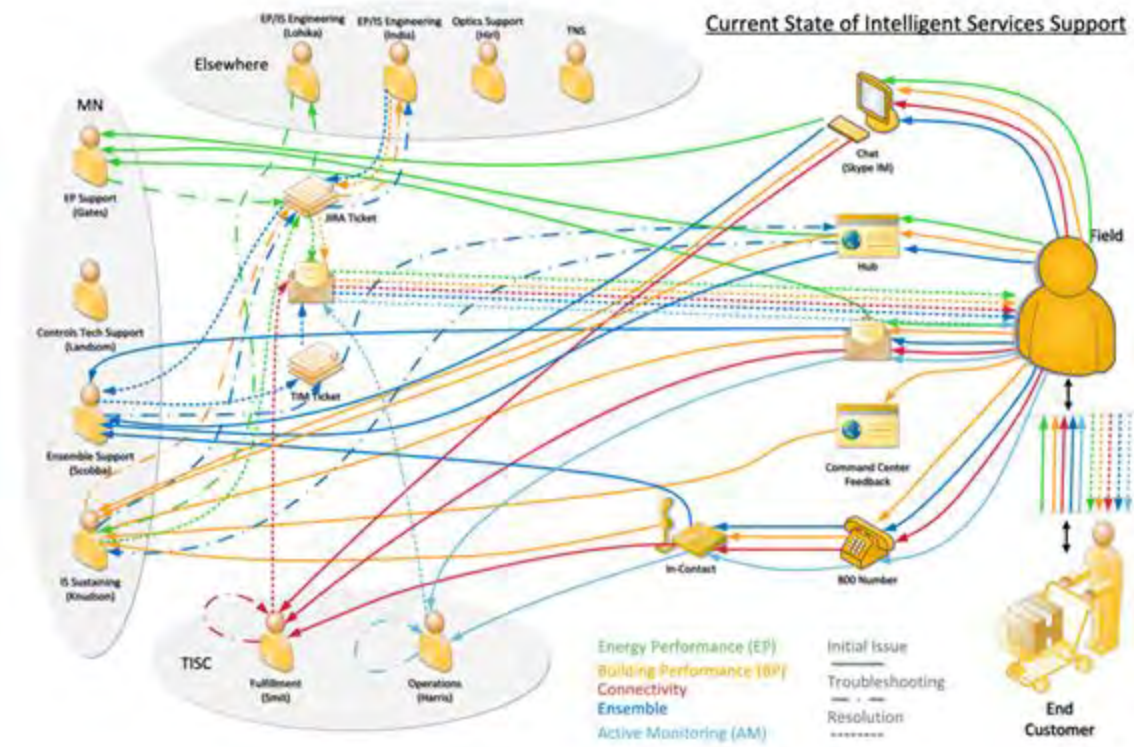
1. Keep current tenants happy and fill vacancies as quickly as possible
2. Keep building maintenance and improvement costs low enough to maintain profitability, while still keeping tenants happy





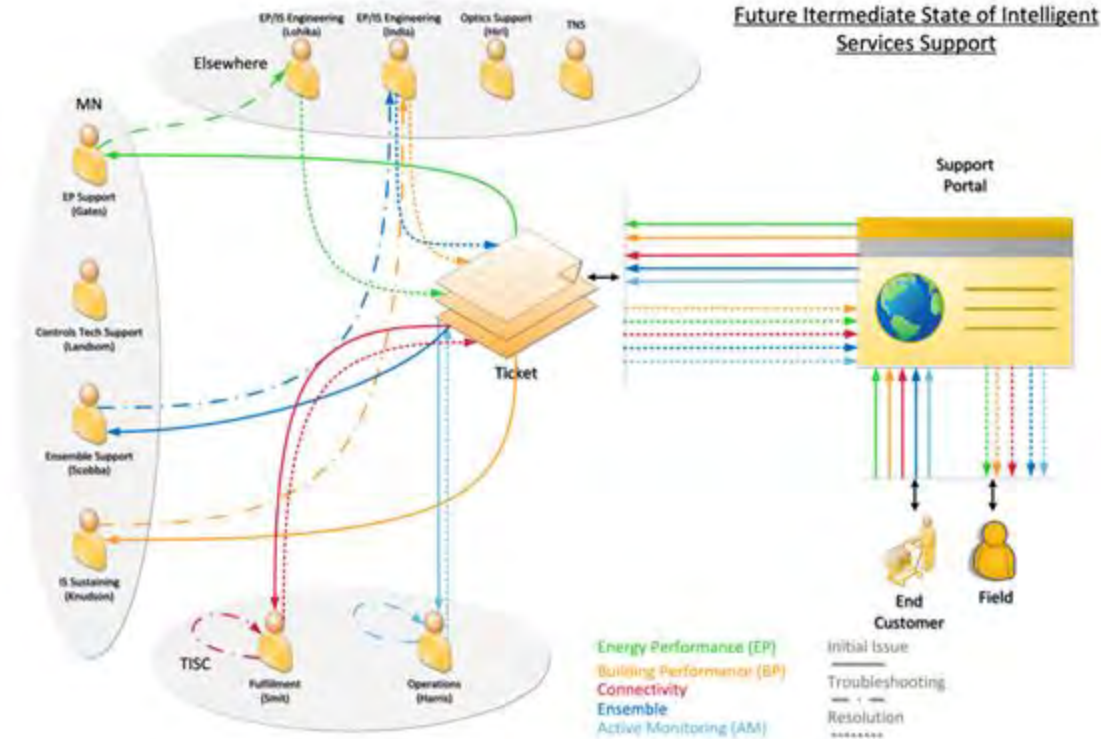
Trane Digital Support Services – Road Map

**EMPATHIZE: CURRENT STATE > FUTURE STATE**





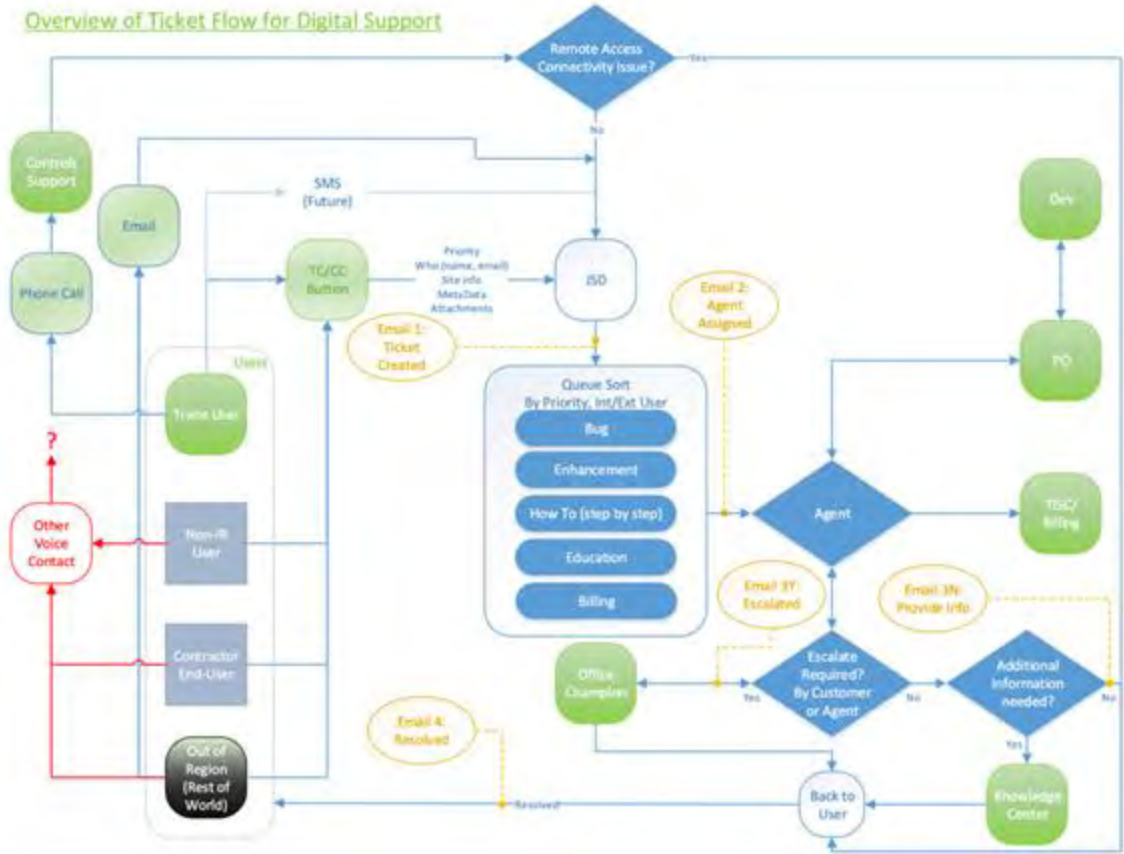
# Planned - 2019



# Ticket Flow - 2019



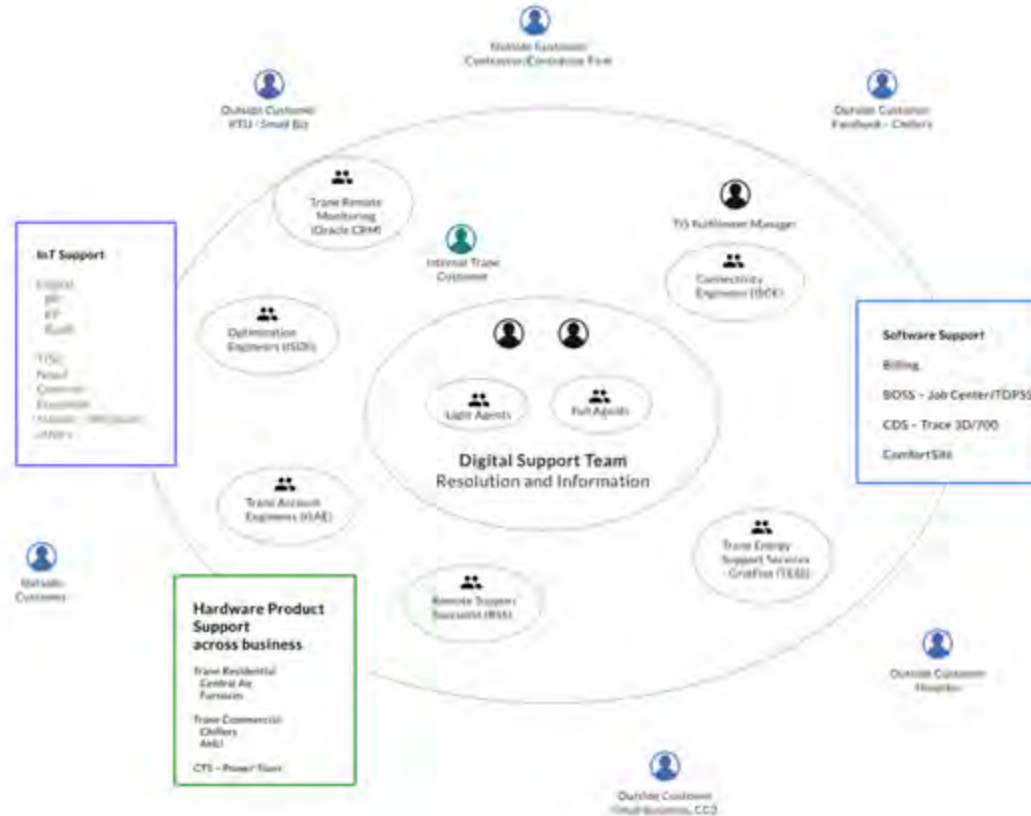
Overview of Ticket Flow for Digital Support



# Trane Support Ecosystem - 2020

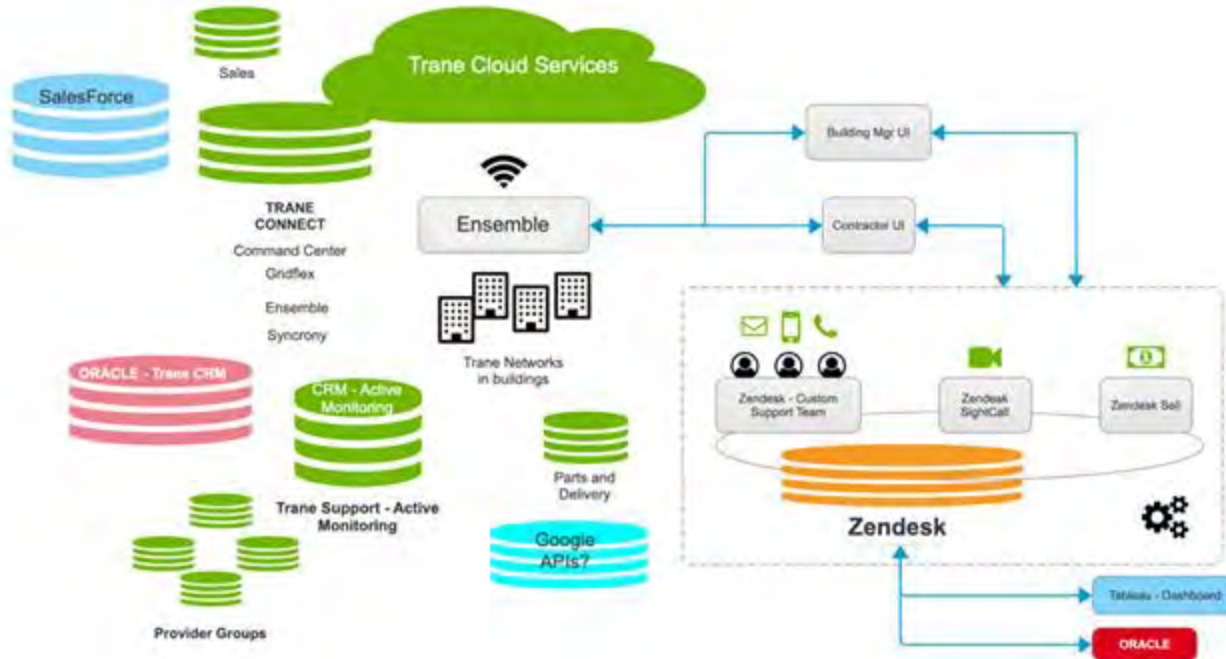


- Personas**
- Technical Support Engineer
  - External Customer Contractors
  - Internal Trane Employee/Customer



# Zendesk - Future State Projections 2020

The Support landscape > exploring the potential connections



High Level Findings and Potential Work Streams

# **EMPATHIZE: SUMMARY**

# Executive Findings



1. **Zendesk implementation should continue to roll forward**
  - a. Support leadership (Pete, Tracy, Sandy, John K.) have expressed their preferences and goals to implement Zendesk as much as possible
  - b. This provides a more comprehensive way to serve customers, giving support faster, more efficient ways to organize tickets, search items, review metrics and essentially speed up the process to get to the right answers, locate SMEs that have answers and reach out to other support teams.
  
2. **Resolve the Trane Connect Help and Feedback issues**
  - a. With the collective efforts of TC, Tracy's team, UX and Gamma Dev, the Trane/Zendesk (MVP) Help and Feedback form is now live.
  - b. Trane Connect users can now submit Request for Help tickets and give Feedback through the Zendesk form on Trane Connect
  
3. **Promote Self-Service as a foundational best practice**
  - a. Determine how and where to improve Self-Service
  - b. Consider hiring professional consultants, such as Forrester or Gartner to help us refine this best practice



# Executive Findings (Cont'd)



4. **Collect and share Support metrics and analytics**
  - a. Look for ways to consolidate qualitative and quantitative metrics in Zendesk
  - b. Provide insights to other TT teams
  - c. Review and compare OOB reporting features in ZD
  
5. **Expand ZD integration to include Alert Management**
  - a. Integration challenges include Oracle CRM to ZD, connectivity and functionality
  
6. **Conduct research on Mechanical Contractors**
  - a. Determine how and where we can facilitate better user experiences and customer experiences of this Persona.
  - b. Conduct Contractor Persona research
  
7. **Implement Video-Capture via Zendesk integrated Apps**
  - a. SightCall  
Enables support to screen share and do video capture of a customers' issues in real time, as well as saving that video clip to share downstream





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## The need to compete on the basis of CX has never been stronger.

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- CX results have plateaued for the third year in a row.
- There has been a rise of values-based CX, with customer expectations at an all-time high.
- CEOs are getting pressured to show quick results.
- Brands have been focusing on outputs instead of outcomes, but customers care about outcomes.



# Executive Findings (Cont'd)



## 8. Implement Zendesk Sell

- a. Generating leads and tracking important sales opportunities, ZD Sell connects Sales Teams with essential information that might otherwise not be available
- b. Conduct Pilot Studies and confirm the value

## 9. Simplify Contract Forms

- a. Transform the existing, problematic forms into more usable, useful and desirable formats
- b. This takes a huge burden off our customers and our support teams

## 10. Self-Service Chatbot

- a. Smarter chatbot services include a menu of choices that enable a user to drill down categorically to find answers
- b. Consider providing a similar service for Trane Customers

## 11. Improve the way we document Wishlist Features

- a. There are many teams in support, but there does not appear to be a centralized way to document and share ideas
- b. Consider unifying the input from the teams
- c. Consider compensation for something like "Best Idea of the Month" or quarterly recognition

# Executive Findings (Cont'd)



## 12. Improve Knowledge Transfers and the collective knowledge of Retirees

- a. Review where and how TT retirees can assist in Support Teams
- b. IR has programs to help retirees and managers collaborate on part time work
- c. Explore the possibilities

## 13. Improve the depth of Support Tickets

- a. TSE's need the appropriate depth of information when working on tickets
- b. Review specific information needs and adjust the forms if possible
- c. This will reduce the amount of time TSE's spend, following up for more information

## 14. Zendesk Collaborative Tools Enhancements

- a. Continue to expand Zendesk capabilities
- b. Assess and test the efficiency of integrated tools and services

## 15. Customer Satisfaction Tracking

- a. Consolidate Customer Satisfaction metrics
- b. Collaborate with the various Support System Managers
- c. Bring the data together in one shared space



CX leaders grow revenue faster than CX laggards.

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### Stock price growth



### Total returns



Source: Public stock price information; "CX Quality Can Affect Stock Performance"  
Forrester report, February 22, 2018



Keep track of your shipments



## 16. Resolve User Access Issues

- a. This UX work is now in progress, focused on assuring Trane Connect users that they can access the portal or easily recover a password when those mistakes are made.

## 17. Implement Zendesk Live Chat

- a. This is now a part of our current Zendesk package, but the missing pieces here are setting up TSE's that can serve people via Chat.
- b. The other embellishments for Chat will be the ability for Chat team members to identify key SME's whenever escalation is required. ZD, once more information is consolidated, will become more efficient in quickly connecting customers with the right resources.

## 18. Implement a Support Progress Tracker

- a. One "Ask" from the field is to implement a way for Support Tickets to be tracked, modeling the way UPS tracks packages, or a Pizza order online, can be tracked.
- b. With Custom Object API capabilities, it's not unthinkable that this could be set up, and prompts the other obvious question: Isn't there an integrated ZD app that can handle this?



## 19. Move Support Teams to quieter spaces

- a. When teams are located next to each other, it's not unusual for conversations or Ad Hoc desk meetings to get loud enough to affect that ability of TSE's to hear customers on the phone, or for the customers to hear noise in the background.
- b. Consider moving the TSE team to a quieter space where noise is not an issue.

## 20. Assessing the TT Support Ecosystem

- a. We have done a first pass meeting, and while there was some progress, overall it appears as though solving the bigger problem of understanding how the TT Support teams and systems can work together more efficiently, is not currently a priority.
- b. If this is not done, we won't have a clear understanding of what, who, where and how we can consolidate and unify all of support.
- c. The bottom line: consolidation and unification can help us achieve the ultimate goal for the company – "Start with the Customer, Stay with the Customer."
- d. Staying with the customer will require us to give them world class customer support and follow up. When we do, our reputation and bottom line revenue will reflect that success.

# Executive Findings (Cont'd)



## 21. Create Customer Journey Maps for each primary persona

- a. After doing the interviews, it became clear that we need to conduct CJM's to help us understand our support team's experience, as well as our TT customers' and internal customers' experience.
- b. Consider conducting CJM's and Service Design studies to comprehensively and accurately understand the user/customers' journey, the touchpoints along the journey, the expectations and the baseline map of the current experience.

## 22. Assess Trello's Connectivity with Zendesk

- a. There is a ZD integration for Trello
- b. Since many of the TT Engineering teams use Trello, review what a ZD integration can do to consolidate and share the TT teams' Trello information.
- c. Work with the TT teams to learn more about what that sharing would look like, who it would benefit and what value that would add to Support.

## 23. Develop a Strategy to Rebrand Support

- a. When team members in the past have had a bad experience with Support, they become less likely to depend upon the normal channels to get things done.
- b. As the new support system continues to evolve, consider a rebranding campaign to call out the new and improved support services.

CUSTOMER JOURNEY MAP Example *Choosing Mobile Plans*





## 24. Establish KPIs and Metrics to Validate UX Value

- a. Setting up and measuring success metrics, gets us closer to understanding how much it costs TT when our products and services are not reaching their target revenue goals.
- b. UX KPI's are one of the tools we have to accurately assess KPI's, and most importantly, then provide a proposed solution for shoring up digital issues that are costing us value in lost time in productivity, adding to the overall frustration of our organization, which can also impact employee loyalty and employee retention.
- c. The bottom line: If it costs \$25K to fix a \$250K issue, it's worth it. If it costs \$50k to fix a \$1.5M problem, *it's essential*.

## 25. Consider assigning a Digital Support Team PO to guide ZD Integration

- a. The progress and requirements for driving a more successful Zendesk and other support systems integration, are contingent upon the ability of the organization to manage, lead, research, develop, assess the usability, conduct necessary research and deploy world class products and services – including customer support services.
- b. Having a PO in place (please note, John Knutson retired but had no replacement.) will be one way to circle the wagons and get more done, sooner.

Using Business/UX KPIs to justify cost

# **IDEATE: UX RECOMMENDATIONS**



# Research Observations, Proposed UX Solutions and UX-KPI Projections

These highlighted observations include points made by Support leadership, points made by the Trane Technical Support Engineers, professional input from Forrester/Nielsen-Norman and UX best practices standards. Assessing the potential work streams requires Trane Leadership input on priorities and a deeper dive on who would own the various sections of work identified here.

## 1. Self-Service Chatbot

Interview input from a Technical Support Engineer (TSE)

- Observation
  - Using self-service chatbots
- Proposed UX Solution
  - Work on improving the way Chatbots can present self-help options, assisting users (Example: [Merck job search chatbot](#) is a good model to review)



- Trane Business Cost vs. UX Solution Cost
  - **UX KPI: Time spent per week by Technical Support Engineers (TSE) or other Trane internal employees searching for information x average salary of those users x 52 (weeks in a year) = Annual Cost**
  - **Will it cost less year to year, to invest in a UX Collaborative Project to resolve the problem?**

## 2. Improve the way we document Wishlist Features

### Interview input from a TSE

- Observation
  - Based on Sugyana's input and other interviewees, it's clear that although new features and improvement ideas are discussed in team meetings, there could be alternatives to consider, allowing the team to consolidate those ideas into a more cohesive, accessible list that provides a way for the team members to share their ideas, keep a list to track the progress and ultimately, use as a way of giving the team members a way to be recognized for their contributions – not to mention a way for Trane to improve overall.
- Proposed UX Solution
  - Consider easy access ways to document ideas, rank ideas, discuss the value and implement new features or other types of innovation.
- Trane Business Cost vs. UX Solution Cost
  - UX KPI: This value is trickier because it depends on what is proposed, what value accrues from a particular idea, and what advantage this gives the company over time.



### 3. Improve TRANE internal knowledge sharing and utilize the collective knowledge of TRANE Retirees

#### Interview input from Trane Leadership

When a service technician with more than 30 years of tenure at Ingersoll Rand Plc told his bosses he was considering retirement—his knees were no longer strong enough for him to climb rooftops—they created a new job for him and urged him to stay on. Now he works part time from home. Less experienced technicians send him photos of the equipment they need to repair and, using their headsets, confer about how to proceed.

"They're getting trained, and our older technician, who knows our products so well, can keep working with us for many more years," says Michelle Murphy, chief diversity officer and vice president for global talent acquisition at the industrial equipment maker. She wants employees in their 50s and 60s, who make up about a third of the company's workforce, to collaborate with managers about their retirement plans.

- o **Observation**  
Pete addressed one of the advantages that retired Trane employees have – being able to participate in part-time work through IR programs designed to help retirees who want to continue work, but do so with less hours. IR has advised these retirees to work with their managers and determine how this could play out to everyone's advantage. Additionally, as suggested by Pete, TRANE Support teams could potentially draw from their knowledge by integrating them into a system like Zendesk that could then identify SME's

related to specific Help Ticket challenges. Essentially, they become part of the triaged effort to assist our customers.

- o **Proposed UX Solution**
  - Learn more about the program and determine where and how it would make sense to bring these SME retirees into the overall TRANE Support network.
- o **TRANE Business Cost vs. UX Solution Cost**
  - KPI: This is more difficult to put into quantitative terms until more is known about what can be done in an initiative like this.



#### 4. Improving Self-Service Resources with a Help Center

Interview input from a TIS Fulfillment Admin

- Observation
  - Fact: Self-service is a contemporary best practice in support systems; Forrester and Nielsen Norman
  - TRANE resources are hard to find or in some cases, not available
  - Hard to locate information on the HUB.
  - Without a comprehensive, usable and useful knowledge base for self-help guides and self-service documentation, our support teams must spend more time assisting people who could otherwise be helping themselves.
  - The obvious face-value proposition: Promoting self-service can't be accomplished if we don't have strong enough resources that we can refer to customers or team members.
- Proposed UX Solution
  - Spend the necessary time to:
    - Improve the self-help guides and video content
    - Assist in the planning and migration of information from the Confluence resources and the HUB resources over to a user friendly Zendesk Help/Knowledge Center
    - Conduct a taxonomy study to help organize the information
    - Utilize UX Architects to assist on the information architecture and customer journey mapping
    - Conduct usability testing during this work and through Beta releases
    - Conduct follow surveys or interviews to elicit CX feedback
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Time spent per week by Technical Support Engineers (TSE), TRANE customers, or TRANE internal employees searching for information x average salary of those users x 52 (weeks in a year) = Annual Cost
  - *Will it cost less year to year, to invest in a UX Collaborative Project to resolve the problem?*





The screenshot shows the Ogoth Help Center interface. At the top left is the Ogoth logo, and at the top right are links for 'Community', 'Submit a request', and 'Sign in'. The main heading is 'Welcome to Ogoth Help Center!' with a subtext: 'Check out our step-by-step tutorials, browse through our FAQs, and post your own questions for Support.' Below this is a search bar with the placeholder text 'How can we help you?' and a magnifying glass icon. A blue banner below the search bar contains the text 'New to Ogoth? We'll help you borrow eBooks, audiobooks, and more from our library.' with a 'Learn more' button. A navigation bar below the banner features six icons: a paper plane for 'Getting Started', a video camera for 'Video', a lightbulb for 'Ideas', a calendar for 'Training', a star for 'FAQ', and an envelope for 'Contact Us'. The bottom section is divided into two columns: 'Promoted articles' with two items: 'Welcome to your Help Center!' and 'How do I customize my Help Center?'; and 'Recent activity' with the text 'No recent activities yet.'

# Zendesk Help Center

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## Example

## 5. Simplify Contract Forms

### Interview input from a TIS Fulfillment Admin

- Observation
  - Contract Forms are difficult to use because they are dated spreadsheets with dense information required that is also difficult for the offices to pull together and get right upon submission
  - When submitted without key details, the TIS Fulfillment Admin can't process the contracts and must circle back with the customer until it's done.
- Proposed UX Solution
  - Assess the form content and format, and discuss what advantages there are if we can translate and port it's equivalent into a Zendesk Form and Format.
  - Assess the most business-critical, revenue-producing areas of the business and target those resources first; then work down from there.
  - Develop guides and FAQs to encourage and open up more avenues of self-service solutions
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Additional time required per week for users to work on customer form input x average salary of that user group x 52 (weeks in a year) = Annual Cost
  - *Will it cost less year to year, to invest in a UX Collaborative Project to resolve the problem?*

## UX Best Practices for Forms

- Only ask for **essential information**.
- Where possible, **fill out fields dynamically**.
- Place field labels and instructions **above the field and only use one column**.
- **Clearly indicate** required fields.
- In addition, include “required” or “optional” in the **html <label> element**:

```
<label for="example">Example (required)</label>
```





## 6. Improving Command Center functionality



Interview input from an Optimization Engineer (ISOE)

Although this is probably well known already, I'm mentioning it to make sure that the ISOE concern is called out.

- Observation
  - Speeding up Command Center, getting faster access to data
  - *"If I had a Command line to run queries, that would enable me to get data."*
- Proposed UX Solution
  - Check into what our UX colleagues can share about CC3/4 functionality, barriers and timeline to fix things
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Additional time required per week for users to work in Command Center, x the average salary of that user group x 52 (weeks in a year) = Annual Cost
  - *Will it cost less year to year, to invest in a UX Collaborative Project to resolve the problem?*

## 7. Support Tickets don't have enough input

### Interview input from a TSE

- Observation
  - Even though the Zendesk forms and ticket submissions are improving, the TSE's find that they don't have enough information from the customer, and typically must spend extra time in trying to get the information they need to resolve the issue.
- Proposed UX Solution
  - Now that UX has some insight into Zendesk form content and functionality, we can work with Support leadership to assess and recommend ways to improve the form experience. UX research and follow up will be needed to make that happen.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Calculate the additional time required per ticket for TSE's, evaluate the options to improve that time, after the solutions have been put in place, and then track the trends with Zendesk Guide to evaluate overall. Refer to the Support leaders regarding what that Annual Cost looks like.
  - Will it cost less year to year, to invest in a UX Collaborative Project to resolve the problem?



# Small CX improvements drive significant revenues

## Drivers of Customer Experience Quality



### Effectiveness

The experience delivers value to customers.



### Ease

It's not difficult for customers to get value from the experience.



### Emotion

Customers feel good about their experience.

One-point improvement in CX Index™ score results in:

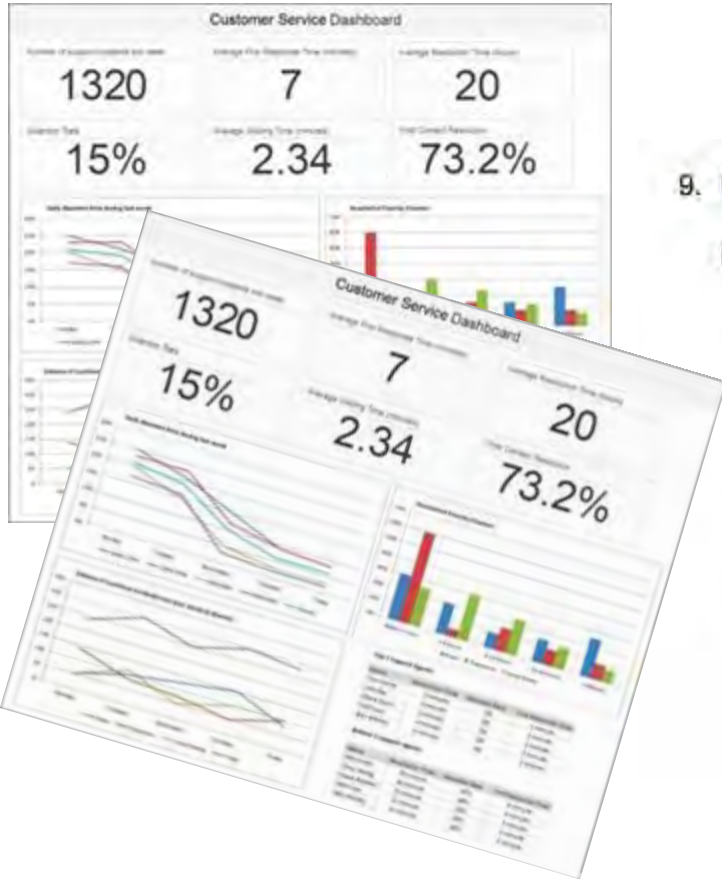
	Annual incremental revenue per customer (from a one-point increase)*	x	Average number of customers per company†	=	Total revenue
Auto manufacturers: mass market	\$48.50	x	18 million	=	\$873 million
Hotels: upscale	\$7.54	x	44 million	=	\$332 million
Wireless service providers	\$3.39	x	82 million	=	\$278 million
Big-box retailers	\$2.44	x	100 million	=	\$244 million
Auto and home insurance providers	\$14.32	x	15 million	=	\$215 million
Airlines	\$3.49	x	48 million	=	\$168 million
Traditional retail banks	\$8.27	x	15 million	=	\$124 million
TV service providers	\$6.11	x	17 million	=	\$104 million
Internet service providers	\$5.26	x	16 million	=	\$84 million
Rental car providers	\$1.67	x	40 million	=	\$67 million
Auto manufacturers: luxury	\$104.16	x	350,000	=	\$36 million
Direct banks	\$9.96	x	3 million	=	\$30 million
Credit card providers	\$0.08	x	61 million	=	\$5 million

## 8. Zendesk Collaborative Tools Enhancements

### Interview input from a TSE and Support Leadership

- Observation
  - The Technical Support Engineers use Slack to communicate, as well as many other tech teams at TRANE who are integral players in the support solutions network.
  - *"I'd like it to be able to drill down on all the information at hand – so whether it is a Tech, Engineer, or VP – anyone can tap into the system and get a holistic view of the customers history, equipment and any other relevant information on them. Overall, this would impress our customers, cut down on searching for information and make the customer experience as good as it can get."*
- Proposed UX Solution
  - Determine how Slack integration in Zendesk can help us provide faster, more efficient solutions for our customers.
  - Determine how Zendesk Connect and other Zendesk apps can also help.
  - Determine how commonly used tools such as Trello can integrate with Zendesk.
- UX plan: Follow up with Support teams to understand where and how Slack and other apps can be integrated into Zendesk, promoting better customer experience overall.
  - TRANE Business Cost vs. UX Solution Cost
  - UX KPIs – This is more complicated and relative to each tool integration, so TBD.





## 9. Customer Satisfaction Tracking

Interview input from a TSE and from UX

- Observation
  - When asked about tracking customer satisfaction, most participants in this study did not have definitive answers as to how it works now, other than saying that their team leaders did that, or Zendesk does have those capabilities.
- Proposed UX Solution
  - Work with the Support Team leaders to explore the Zendesk capabilities available now and discuss what the most effective ways are to track customer satisfaction. UX Consulting would include best practices in gathering this type of analysis.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI:
    - (Consult with Amy and her team on the best practices from their experience, preferences and vantage points.)*

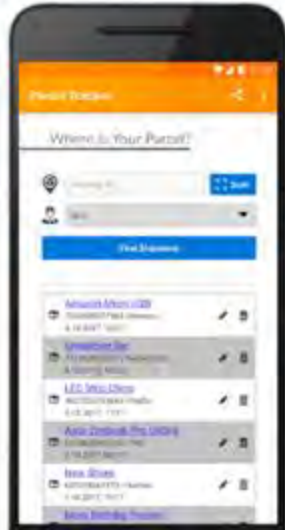
## 10. Implement Zendesk Live Chat

Interview input from a TSE and Support Leadership

- Observation
  - Chat can save customers time.
  - Chat can lessen the burden of excess tickets.
  - To implement Chat, a deep enough network of support SMEs will be required to take on those conversations.
- Proposed UX Solution
  - Discuss how much is required to staff Live Chat solutions.
  - Work with Support to build interactive, self-service Chat solutions, with the caveat that this will require a heavier investment of UX research and testing to ensure a usable, practical and useful customer experience.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Where this service can reduce the number of tickets, quantitative data would be available, but this would be down the road.



Keep track of your  
shipments



## 11. Implement Support Progress Trackers

Interview input from an Optimization Engineer (ISOE)

- Observation
  - Customers and Support Engineers alike, become frustrated when there isn't a clear picture of how long it will take to resolve tickets.
  - The ideal solution is to provide a way to track tickets and allow system users to check on the progress.
- Proposed UX Solution
  - Develop a tracking system that models after UPS or ordering a pizza online, tracking the time it takes to resolve tickets.
  - Custom KPIs and custom object code may become part of this solution.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: This is a trickier value to track, so it's TBD for now.

## 12. Move Support Teams to quieter spaces

Interview input from the TSE team

- Observation
  - This team has reported that too much noise from other colleagues' conversations can disrupt their ability to communicate with customers.
  - *"It can be pretty noisy at times."*
- Proposed UX Solution
  - Consider moving them to another space at the TRANE WBL offices, where there is less noise.
- TRANE Business Cost vs. UX Solution Cost
  - This value is probably more associated with internal team loyalty and retention. Discus with internal team to assess.





# Customer-obsessed companies demonstrate improved business results

"Our revenues grew 10% or more during our last fiscal year."



"Customers are satisfied with our products and services."



"Employees are happy to work in my organization."



# 2X

... higher approval ratings for CEOs in the most customer-obsessed companies compared to those in companies with the lowest obsession scores

Base: 1,024 global executives

Source: Forrester's Customer-Obsessed Operating Model Online Survey



### 13. Determine how and where to improve Self-Service

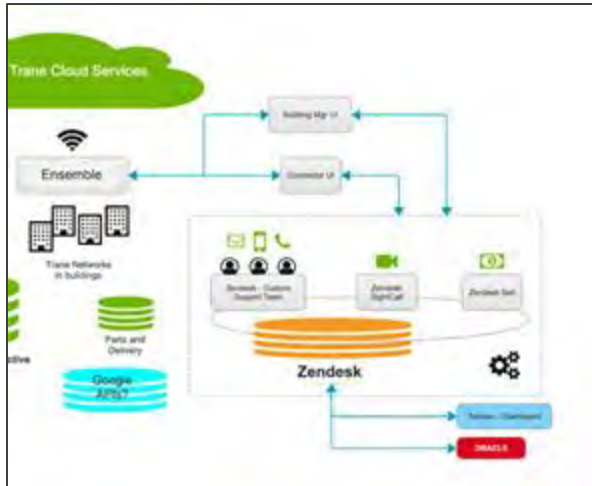
#### Interview input from TSE team

- Observation
  - In these interviews, Self-Service came up as a preferred way to save time and empower our customers.
  - Self-Service is also a Best Practice for contemporary Support solutions (Forrester, Nielsen-Norman, Gartner, etc.)
- Proposed UX Solution
  - Assess the most important areas of focus where we can improve the Self-Service options.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Excess time spent by customers and support team members when information for self-service cannot be found. In terms of internal teams, that amounts to: Average Salary x Hours spent searching per week x 52 weeks/yr. For customers that lack in support can, in some cases, prompt them to look at competitors.

## 14. Assessing the TRANE Support Ecosystem

### UX input

- Observation
  - The whole system of support, includes a wide range of technology, tools, people served, people serving, assets (such as documentation, guides and contracts) and integrated systems. Because the overall system is so complex, it's necessary to assess all the moving parts, define as much as we can and create some documentation and diagrams to use as a baseline.
- Proposed UX Solution
  - Assess and define the ecosystem with the input from TRANE Leadership, UX and Support SMEs
  - Calculate and estimate the overall value of continued research
  - Conduct Customer Journey Mapping for the 3 primary personas
  - Define work streams needed to address the future state plans
  - Consider a comprehensive end-to-end study of TRANE Support
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: This cost overall relates to potential company loss, and if deemed worthy enough, will include estimating the time lost due to the support system challenges, as well as assessing the potential loss of customers, and some of the trickier projections (as detailed in Forrester research) regarding how improved customer support carries with it, growth via word-of-mouth marketing. This sort of research will consist of broader quantitative and qualitative research initiatives.

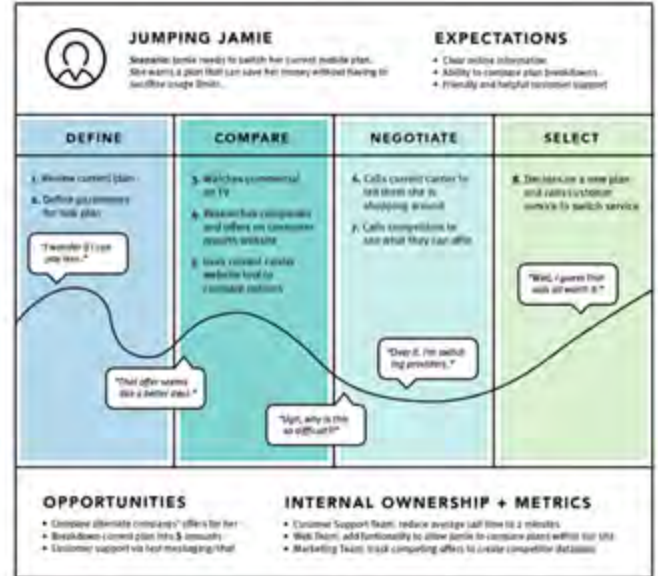


## 15. Service Design and Customer Journey Mapping Research on Zendesk TSE Workflow

### UX input

- Observation
  - As Zendesk becomes more prominent in TSE work, it's essential assess the Service Design of the workflow as well as the CSJ, w a goal of understanding how the support teams can take full advantage of the Zendesk features and understanding how the teams can the easily and efficiently work together.
- Proposed UX Solution
  - If we are going to grow into a world class support system, it will b essential to conduct Experience Journey Maps combined with Service Design studies. This combination will provide a way to understand and improve the way people are served and the way people internally are serving, including an analysis of the most critical touchpoints between the integrated systems and assets.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Improved Service Design value assessment would requi a baseline understanding of productivity compared to a future sta data on productivity.

### CUSTOMER JOURNEY MAP Example (Switching Mobile Plans)



## 16. Review Trello's Connectivity with Zendesk

Interview input from a TSE and a Controls Manager

- Observation
  - Some Support Managers and Support Engineers use Trello, storing a lot of pertinent project information and documentation.
  - Questions arise here, regarding the depth of information being saved in Trello, and how that information can be used by the broader network of support systems and TES teams.
- Proposed UX Solution
  - Discuss and determine where and how Trello integration can augment Zendesk resources, such as the Trane/Zendesk Help Center.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Where all teams collectively save time, those hours do translate into quantitative wins. So, this is TBD.





## 17. Provide Assigned Support SMEs

### Interview input from Controls Manager

- Observation
  - Some Support Managers have expressed the frustration of not being able to talk to someone quickly when there are urgent situations or customers that need answers.
- Proposed UX Solution
  - Discuss and determine where and how Support SMEs might be able to be assigned to specific Support business groups.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: Can save time on both the support side and the customer side.



## 18. Develop a Strategy to Rebrand Support

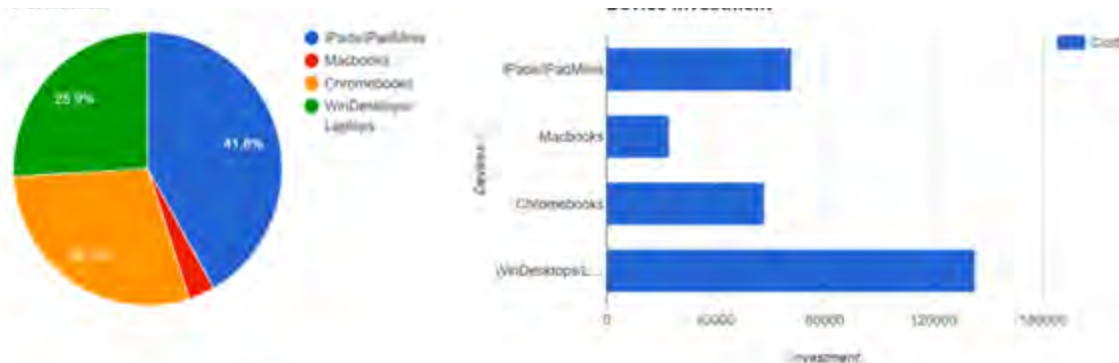
### Interview input from a Controls Project Manager

- Observation
  - Due to a lack of more response when giving or using the previous feedback forms, some support team members have lost confidence in the forms and the system, and state that they won't even use it anymore.
    - *"We don't use the Feedback button anymore."*
- Proposed UX Solution
  - Discuss rebranding ideas to help restore the confidence of the user and customer community.
  - Consult with the Marketing team, regarding a viable approach to help turn the doubt into trust again.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: (TBD)

## 19. Establish KPIs and Metrics to Validate UX Value

### UX Input

- Observation
  - This is a wide range of UX KPIs that will help the organization assess the benefits vs. cost of doing more UX Research.
- Proposed UX Solution
  - Define the value of consolidating this work, and determine which areas should be prioritized.
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: (TBD)







## 20. Provide Support via Texting

### UX input

- Observation
  - To stay aligned with the TRANE “Start with the Customer; Stay with the Customer” principle, and in keeping with the Nielsen Norman principle regarding customer preferences in communication, it’s essential to implement contemporary solutions that will meet our customers where they prefer to do business.
- Proposed UX Solution
  - (Define the value of consolidation)
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: (TBD)





## 21. Consider re-assigning a PO Support position

### UX input

- Observation
  - Since the beginning of the Zendesk Migration, the Digital Support Team could have accelerated progress by putting together an Agile Team led by a PO that can drive the most advantageous development of customer support.
- Proposed UX Solution
  - (Define the value of consolidation)
- TRANE Business Cost vs. UX Solution Cost
  - UX KPI: (TBD)

UX Discovery > Forrester, Gartner and Nielsen-Norman

## **PROTOTYPES: COMPARATIVE STUDY**

## Understanding the Value of Customer Support

Outstanding customer service is a cornerstone of any company's customer experience (CX) strategy. However, few companies are able to deliver due to the rapid rate of innovation, the complexity of evolving technology, the changes in customer demands, along with the impact of vendor mergers and acquisitions.

*Excerpted highlights from: Transform the Contact Center for Customer - Service Excellence - Forrester Report*

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1. *62% of U.S. customers have stopped doing business with a brand due to poor customer service.*
  - a. *Translated in TRANE challenges:  
Setting up metrics will be necessary to help us track these figures, so collaborating together, what can we do to bolster these insights?*
  
2. *If a company has 4 million customers, each of whom spends \$100 per year, the total projected annual revenue would be \$400 million. Three out of five us online adults say that they are unlikely to return to a website that does not provide a satisfactory customer experience. For a company, that represents 2.4 million customers. at \$100 apiece, this means a \$240 million loss in revenue annually.*
  - a. *Translated in TRANE challenges:  
What surveys do we have that addresses this analysis?  
If none, what can we do as a team to develop this type of metric?*
  
3. *Customer service, a cornerstone of an organization's CX strategy, is the ability to serve customers — either via self-service or an interaction with a contact center agent — before, during, and after a purchase.*
  - a. *Translated in TRANE challenges:  
When we say that our collective goal is to "Start with the Customer: Stay with the Customer!" — how are we delivering on that promise if we can't "Stay with the customer" all the way through their customer service support experiences, giving them the superlative experiences, they deserve?*

4. *"The revenue impact of a 10-percentage-point improvement in a company's customer experience index (CX Index™) score can translate to more than \$1 billion.*
  - a. *Translated in TRANE challenges:*
    - i. *How can we figure out our CX Index?*
  
5. *By leveraging the right technology and processes centered around AI and automation, organizations create deeper value-adding relationships with their clients. This leads to increased retention, spending, and advocacy — all of which boost top-line revenue.*
  - a. *Translated in TRANE challenges*
    - i. *To leverage all, we can from Zendesk, what can we do to boost top line revenue, using the ZD features such as ...*
      1. *Zendesk Connect*
      2. *Zendesk Sell*
      3. *Custom ZD APIs*
  
6. *Zendesk is not the answer to all Support challenges*

*We have learned that while Zendesk does an amazing job in the customer support advantages that they provide, there are other solutions like Salesforce and Oracle CRM integrations which will be needed to ensure that the best overall solutions are in place.*

  - a. *Translated in TRANE challenges*
    - i. *Augmenting Zendesk, we'll have to consider the advantages of integrating Salesforce and Oracle – both requiring validation in where and how they can facilitate and bolster Customer Service throughout TRANE.*

## 7. Key Strategic Actions for TRANE

### *Recommended by Forrester ...*

- a. Establish the value of customer service*
  - i. Confirm that TRANE has a way to quantitatively and qualitatively measure the value of customer service*
- b. Set the right strategy*
  - i. Deeper discussion and strategy is needed to shore up the goals that will bring us the most value. What metrics can we leverage?*
- c. Execute the strategy with precision*
  - i. With the Marketing Insights team, UX, Support Leadership and top down confidence, what can we work on to assure “strategy with precision?”*
- d. Measure and improve operations*
  - i. Working collectively, we should be able to figure out and ferret out new ideas on how to improve and validate with measurements*

## Assessing the Value of Customer Support

As a business, it is essential to assess the value of Customer Support in quantitative and qualitative metrics. But what if we aren't set up to do that? To best answer these questions, we'll need to dig deeper and review what needs to be measured, what is in place now, identify the gaps, and take an honest look at what we can do to understand, prioritize and improve these critical areas of concern.

### Key Areas of Concern

- **KNOWING WHAT TO MEASURE**

If Trane does not identify the key metrics to measure the success of CX, then it won't know what is failing, where the opportunities are to succeed, and why

- **TRACKING LOSS OF TALENT DUE TO SUPPORT ISSUES**

It also will not be able to track key internal talent that leaves the company due to poor CX, nor the profit losses when clients leave due to poor CX

- **MEASURE THE FINANCIAL IMPACT OF SUB PAR CX AND SUPPORT**

This is why it's essential to conduct quantifiable research that will help establish these facts, facts that are essential to the overall financial health as well as to the cultural health of the company.

- **USE BASELINE DATA TO RE-ASSESS PRIORITIES**

This is where we would rely more heavily on the expertise of CX Professionals outside of our company. For investing in that caliber of professional consulting to assess the health of our Customer Support services and systems, would be an investment that could give back millions in return. But don't take it from me, take it from them. I'm proposing that before our leadership jumps to a less informed decision, we take the time to invite a professional firm like Forrester or Gartner to speak with us about their take on what can be done and what value that can bring to us – short and long term.



## Customer Support Best Practices

### Forrester - What the Modern Super-agent needs

#### a. Enhanced Context for more Personalized Customer Engagement

Modern agent desktops must empower agents to understand the customer and their context. Any customer intent gathered from the channels that the customer has used in a journey must be passed to the agent.

#### b. 360-degree views of the customer to better match customers to agents

Customer context must include a broader set of attributes gleaned from unstructured interaction data to allow true one-to-one interactions, such as occupation; conversational style; buying indicators; life events; relationship graphs, such as households; organizational hierarchies; and influencer relationships.

#### c. Visible health scores and journey timelines, organized around the customer

Where they are in their usage journey — from onboarding to adoption to deepening product usage — as well as their current health and how their health has trended over time. Agent desktops must include adoption timelines and health scores — a composite score of product usage, reported issues, contract terms, and satisfaction. Agent desktops must also surface key insights that help agents understand the likelihood that the customer will churn.

#### d. New visualization to reduce agent cognitive load to better connect with customers

Companies will look to bring the intimacy of, for example, an in-store experience to the agent desktop. The company uses expressions and colors to indicate customer emotions and whether the customer is new or returning.

#### e. Adaptive user experiences to enable agents to seamlessly move between channels

These experiences will also be controlled by the agent, as the channel that a customer originally uses may not ultimately be the best channel to troubleshoot or resolve the issue. For example, an inquiry that begins over messaging may be better answered via video chat, where an agent can visually inspect a device, followed by a messaging interaction so that the customer can share error logs. Agents must be able to move seamlessly between channels, based on best channel treatment, while preserving context and content.

#### f. Support software with "Computer Vision" that automatically identifies products and issues

Agents must be able to quickly identify equipment, part numbers, and visual cues to troubleshoot issues. "Computer Vision" automatically identifies and extracts and analyzes meaningful information from images or videos and matches images to known components. Agents can also search through massive data sets of captured technical cases for similar situations.

#### g. Fluid agent collaboration to connect resources together for rapid resolution

Since Superagents will have to troubleshoot harder issues, they will increasingly rely on collaboration with customers, other agents, product experts, and even bots. Agent desktops must contain collaborative zones, and even n-way video, to bring expert resources together to swarm around an issue and collectively work to understand its root cause, impact, and resolution.

#### h. Localization and Behavioral Data To Build Emotional Connections With Customers

Most often, agent interactions start with an anxious or frustrated customer who has been unable to self-serve and feels that their time has already been wasted. This means that agents must get these interactions right; if they do so, these become rare moments to nurture relationships. To increase successful outcomes, modern agent desktops should have:



Forrester's CX Index score measures how successfully you deliver CX that creates and sustains loyalty.

We survey your customers and your competitors' customers — 600 brands across 17 industries.



The CX Index provides a deep dive into emotion, which has the biggest influence on customers' loyalty to a brand.

When positive emotions of respect and feeling valued and appreciated are elicited...



will advocate.



will retain.



will enrich.

When negative emotions of annoyance, disappointment, and frustration are elicited...



will advocate.



will retain.



will enrich.

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## Prioritize: Make investments that drive loyalty.

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- Identify the priority drivers leading to customer retention, enrichment, and advocacy.
- Determine likely revenue improvements by improving specific experiences.

---

## Measure: Understand the quality of your CX.

---

- Get an in-depth view of how your customers perceive the experiences you provide.
- Identify the drivers that have the greatest impact on your CX.



# Appendix

TRANE DIGITAL SUPPORT TEAM

Forrester, Nielsen Norman, Zendesk and Gartner

# **RESEARCH REFERENCES**

# References

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## Forrester

- **How To Build A Modern Agent Desktop And Transform Customer Service Experiences**  
The Five Critical Elements For The Agent Desktop Of The Future
  - by Kate Leggett January 28, 2019
- **Transform The Contact Center For Customer Service Excellence**  
Executive Overview: The Contact Centers For Customer Service Playbook
  - by Kate Leggett March 19, 2019
- **Forrester Overview |. Our Contact Center And CRM Capabilities**
  - August 2019

## Nielsen Norman

[Nielsen Norman – Customer Service Best Practices](#)

Vol. 6: Customer Service  
Based on eye tracking, user testing, and diary studies  
4th Edition  
Kim Flaherty

## Gartner

**Magic Quadrant Analysis | Zendesk & Salesforce**

<https://www.zendesk.com/resources/gartner-magic-quadrant-crm/>

Comparative / Competitive Insights

**ZENDESK**

## Business models, trends and adoption

- Keeping up with contemporary eCommerce
- Market demands in mobile
- *Start with the customer, stay with the customer*

### Trends are driving change

Creating new products and services for consumers





## Communication Channels

- Connecting with the customer where they want to connect
  - Phone, Texting, Video
  - Facebook, Whats App,



“The way we communicate has fundamentally changed. With more than 5 billion accounts worldwide, messaging apps like **Facebook Messenger, WhatsApp, and WeChat** have made it easy to connect in a more personal way with friends and family from anywhere in the world.

**Businesses already know they need to be where their customers are.** But with the growing number of channels and constantly changing technology, it’s become harder than ever to manage conversations across channels.”

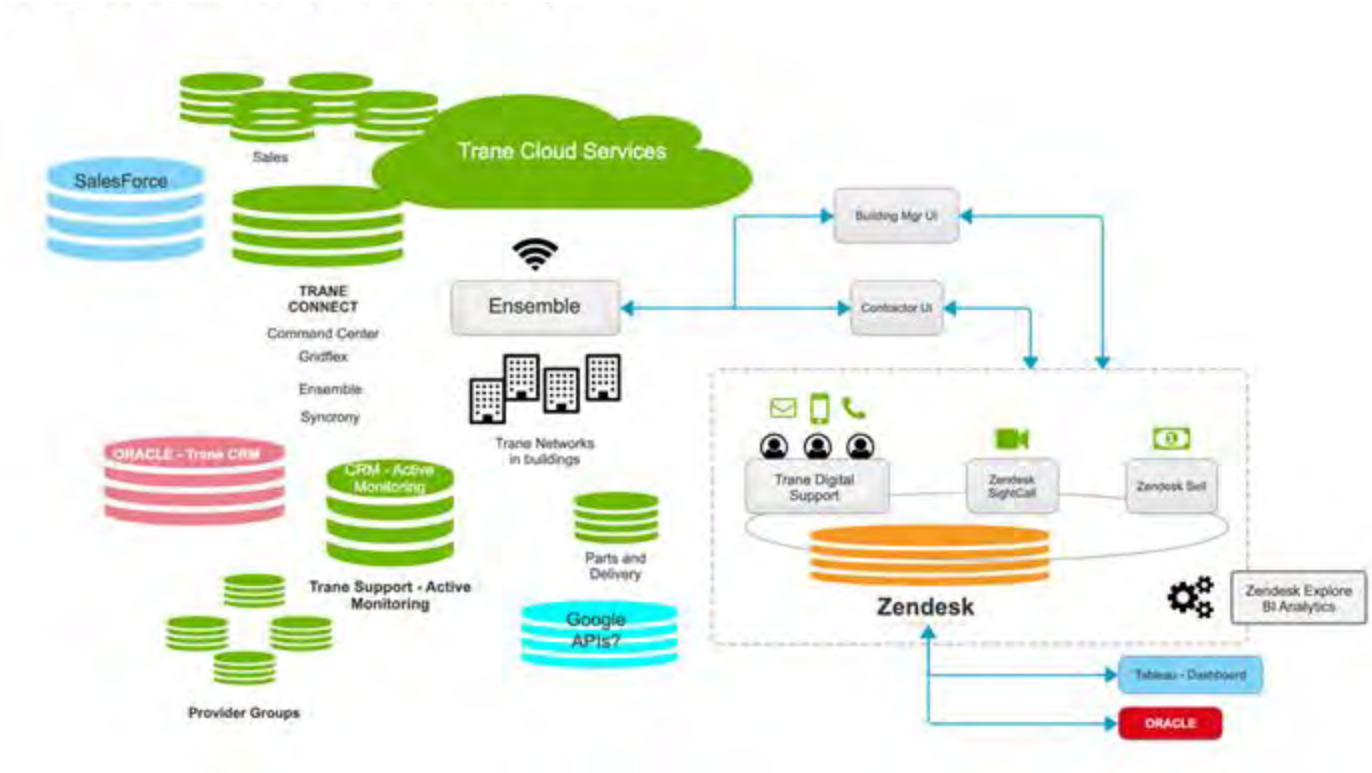
## Foreign Language support

“When it came to building a global messaging solution that would connect guests with our colleagues on property, we wanted to ensure that our guests had the ability to message us on their preferred channel and in their preferred language. Sunshine Conversations was the only platform that met all of our global requirements, and allowed us to provide a truly personalized service that is safe and secure”

MARCO TRECROCE  
SENIOR VP & CIO, FOUR SEASONS



# Zendesk & Trane Ecosystem



# Trane Sales

- Unified
- Expansive
- *Start with the customer, stay with the customer*

**Platforms and marketplaces allow companies to deliver great customer experiences which impact topline revenue**

## **Retention loyalty**

The likelihood that a customer will **keep existing business** with the company

## **Enrichment loyalty**

The likelihood that a customer will **buy additional products and services** from the company

## **Advocacy loyalty**

The likelihood that a customer will **recommend the company** to others

# Zendesk Capabilities Overview

Covering the entire Zendesk landscape, we'll need to assess what integrated services will best serve our needs. This will require assessments of the cost of the services we don't have as well as projecting the total number of people from each of our business groups that want to use Zendesk. That analysis will give us a way to then project the costs overall, providing a way to get closer to some hard numbers. Last of all, we will need to understand the Trane business goals and ensure that we are still aligned with those targets if we utilize Zendesk to it's fullest capacity

Capabilities list	Details	Feasibility	Cost	Solution
ZENDESK SUNSHINE	Integrated Zendesk Products --	Yes	Enterprise Package	Zendesk Product
CALL CENTER SOFTWARE	Ticket Management and Comm	Yes	Enterprise Package	Zendesk Product
SIGHTCALL	Video capture for troubleshooting support	Unknown	Unknown	Third Party
ZENDESK LIVE CHAT AND MESSAGING	Chat	Yes	Enterprise Package	Zendesk Product
ZENDESK INTEGRATED CUSTOMER SUPPORT	part of Sunshine	Yes	Enterprise Package	Zendesk Product
BUSINESS ACCOUNT CREATION	Trane BI and Admin access	Unknown	Unknown	Third Party
ZENDESK SELL (competes with Salesforce)	Sales integration	Yes	Unknown	Zendesk Product
EQUIPMENT and ASSET TRACKING	Enabling us to track assets and associated serial, model numbers, history, etc.	Unknown	Unknown	Third Party
PARTS ORDERING, TRANSACTIONS AND DELIVERY	Trane Store integration with Delivery comm and tracking	Unknown	Unknown	Third Party
KNOWLEDGE BASE AND SMART SELF-SERVICE	Part of Sunshine	Yes	Enterprise Package	Zendesk Product
MASTER ZENDESK PARTNERS	Extensible partner channels	Yes	Unknown	Zendesk Product
ZENDESK EXPLORE (ANALYTICS)	Analysis of all company activity happening in ZD	Yes	Enterprise Package	Zendesk Product
ZENDESK GATHER (Community Forum)	Community forums	Yes	Unknown	Zendesk Product
ZENDESK SUNSHINE CONVERSATIONS	Empowering products and services communication on the widest range of channels including FB, Twitter, IG, WhatsApp, etc.	Yes	Unknown	Zendesk Product

# Zendesk cost analysis

What are the groups and sizes of the groups that will be using Zendesk?  
How many in each group?

What Zendesk tools do they need?  
What is the cost of each set of tools annually?  
What is the total cost?



## Sales

MEMBERS  
# of Trane Sales Team members = \_\_\_\_\_?

APPS  
Zendesk Sell

COST  
Annual Enterprise \_\_\_\_\_



## TIS Support

MEMBERS  
# of TIS Support Team members = \_\_\_\_\_?

APPS  
Zendesk Sunshine

COST  
Annual Enterprise \_\_\_\_\_



## Trane Parts & Services

MEMBERS  
# of Trane Parts Store Team members = \_\_\_\_\_?

APPS  
?? Shopify?

COST  
Annual Enterprise \_\_\_\_\_



## TIS BI Analytics

MEMBERS  
# of TIS BI Analytics = \_\_\_\_\_?

APPS  
Zendesk Explore

COST  
Annual Enterprise \_\_\_\_\_



## Third Party Solutions & API Development



## Additional Groups & Costs

## Modern CRM transforms across four dimensions

Platforms and marketplaces  
rise in importance



# CEC\* Best Practices



“The best of today’s \*Customer Engagement Center applications have tools for both agents and customers. Their applications also had to comply with a set of technical and design considerations that emphasized:

- Scalable cloud-based systems
- Embedded AI within multiple customer service functionalities (such as intelligent case management and intelligent workflows)
- Real-time and predictive analytics
- Agent guidance and navigation
- Scalable cloud-based systems
- Embedded AI within multiple customer service
- Functionalities (such as intelligent case management and intelligent workflows)
- Real-time and predictive analytics
- Agent guidance and navigation
- Proactive messaging to customers
- Automation of engagements using AI
- Digital workflow/BPM support
- Contextual knowledge management
- A participating ecosystem of independent software vendors (ISVs) for functional enrichment”

# CEC Best Practices (Cont'd)



“The software functionality weightings we used for this Magic Quadrant reflect the most common requirements expressed by Gartner clients and our view of how requirements are evolving. In rank order (heaviest weighting to lightest), they are:

1. Case management/problem/service resolution (a core CRM system and controls over customer master data); also team collaboration capabilities (an evolving requirement)
2. A knowledge-based solution with multisource search optimization
3. Workflow management
4. Real-time guidance/decision support
5. Digital engagement channels, including email, chat, messaging, co-browsing and video
6. Mobile support
7. Predictive customer analytics (sentiment, emotion, intent)
8. Adaptive business rule engine
9. Social media engagement management
10. Support for video libraries and video
11. Voice of the customer
12. Virtual customer assistant
13. Internet of Things (IoT) connections (a visionary feature)”



# Salesforce

"Salesforce has its headquarters in San Francisco, California, U.S. It also has 51 offices around the world, including 16 in the U.S.; three in Canada, Brazil and Mexico; 19 across Europe, Israel and Africa; and 13 in Asia and Japan. In 2018, the acquisition of MuleSoft added a new integration and API management platform to Salesforce's product portfolio and revitalized its Lightning Knowledge solution. It also brought the promise of Salesforce Customer 360 offering a single view of the customer using a universal customer ID (announced at the Dreamforce conference in 2018 and scheduled for general availability in 2019). Salesforce also strengthened its industry position with its Financial Services Cloud, Health Cloud and Education Cloud, and with partnerships with ISVs. Furthermore, it announced deeper AI/ML learning integration with its Einstein and Einstein Analytics products, and has integrated aspects of B2C Commerce Cloud into Service Cloud, such as "Service to Commerce."

Salesforce reported revenue of \$3.6 billion in 2018 from customer service subscriptions and support, an increase of \$738 million (26%) over 2017.

For the sixth consecutive year, Salesforce is the best-placed Leader in this market, due to its growth in terms of numbers of satisfied customers, its dedication to its customers, and its customer service vision and innovation.

Midsize companies and large enterprises should consider Salesforce for their CEC solution, including the Lightning platform.

## Strengths

- Salesforce's customers — particularly large ones — see it not just as a CRM software provider, but also as a strategic advisor on how to innovate and grow their overall business.
- With Einstein, Salesforce uses AI to augment existing functionality like case management, Salesforce Einstein Chatbot and Einstein Analytics across the platform.
- Provision of an extensible platform, complemented by the AppExchange and programs such as Ignite and Trailhead, helps Salesforce differentiate its Service Cloud product in terms of more than features and functions.

## Cautions

- Reference customers for Salesforce referred to a lack of native integration, and to functionality overlap, between the different Salesforce Clouds.
- Although Salesforce has many advanced features, their value remains essentially unproven — a number of reference customers said they have had mixed results. These features include mobile chat, virtual customer assistants, mobile messaging, call scripting and email response management.
- Reference customers for Salesforce expressed concerns about high prices and vendor lock-in after integrating multiple Salesforce components or adding third-party components for industry-specific implementations, interactive voice response and telephony infrastructure"



# Zendesk

"Zendesk is a technology company based in San Francisco, California, U.S. It offers its customer service product only as a SaaS solution, one based on a sophisticated help desk application. Zendesk combines a customer communication hub strategy with engagement orchestration features to form the basis of its CEC application. Zendesk has over 2,700 employees across North America, Europe, Asia and Australia, among other locations.

Zendesk generated \$598 million in revenue during 2018, based entirely on its CEC offering. Zendesk is a Leader, largely due to its having the fastest-growing customer base of any vendor in this market, its pace of innovation and its success worldwide.

Consider Zendesk if you expect user adoption to be a particular challenge, if a SaaS-based application is the most suitable, or if an industry-specific solution is not essential.

## Strengths

Zendesk continues to innovate at a significant pace. It launched several key products and features in 2018, including a deep integration with workstream collaboration technology to improve team productivity.

Zendesk offers practical AI-based capabilities in a number of ways. Its Answer Bot intelligently surfaces knowledge articles and supports chat engagements. New content is intelligently proposed and made easier to create. Customer sentiment is leveraged during an engagement to change outcomes.

Zendesk offers a public cloud solution, Zendesk Sunshine, with an extensive application ecosystem. Its app marketplace offers over 750 easily added apps. It is also the only vendor in this Magic Quadrant to provide native voice support.

## Cautions

Zendesk falls short in terms of providing industry-specific solutions, compared with other vendors in this Magic Quadrant. Its product remains relatively untested as an agent customer service desktop for core industry processes in complex scenarios (such as retail banking, telecommunications and healthcare claims support).

Zendesk's focus on simplicity has resulted in large customer service centers finding its interface less intuitive when trying to manage significant numbers of advisors. Only a small percentage of Zendesk's customers have 500 or more seats.

There has been a notable increase in the number of Gartner enterprise clients in the past year asking about Zendesk's pricing and contracts, especially their complexity, and alternative models. Prospective Zendesk customers should ensure there will be a demonstrable ROI, based on their specific CRM customer service application requirements."

## Gartner Strategic Planning Assumptions (2019)

“By 2022, 70% of customer interactions will involve emerging technologies such as machine learning applications, chatbots and mobile messaging, up from 15% in 2018.

By 2023, organizations that are part of a connected digital business ecosystem will have 40% of their customer service cases initiated by partners in that ecosystem.

By 2023, customers will prefer to use speech interfaces to initiate 70% of self-service customer interactions, up from 40% today.

By 2025, customer service organizations that embed artificial intelligence in their multichannel customer engagement platform will increase their operational efficiency by 25%.”

- Gartner

# CEC Market Definition/Description

“This Magic Quadrant examines the global market for customer service and support applications that enable customer service and support operations to engage with customers and handle their requests in the most effective way. **It covers a wide variety of customer service applications for organizations with customer engagement centers (CECs) ranging from very small (with fewer than 20 agents for assisted service) through average (50 agents for assisted service) to very large and distributed (over 10,000 agents for assisted service).**”

**Over the past five years, Gartner has observed important changes in how organizations handle customer service.** Whereas formerly a single department would respond to customers’ needs, increasingly customer service is now a cross-departmental function that requires coordination. Also, it has changed from a reactive service to an increasingly proactive one.

Additionally, with customer self-service accounting for a growing percentage of customer interactions, digital business models and the growing maturity of artificial intelligence (AI) enable application leaders to advance existing CEC functionality and support the rise of connected customer service ecosystems. And as they do so, the very nature and definition of customer service is changing again.

Gartner now defines the CRM CEC market as the market for software applications used to provide customer service and support by engaging intelligently — both proactively and reactively — with customers by answering questions, solving problems and giving advice. **The orchestration of intelligent customer processes through a CEC application is built around a case management record and process.** It may include advisory services, problem diagnostics and problem resolution, account management, insurance claims handling, servicing of banking interactions, provisioning and returns management, among other things. To be able to orchestrate the processing of customer engagements for the best outcomes in an effortless, effective and timely way, **the workflow is an important component, and some organizations require intelligent business process management (BPM) capabilities.** In addition to case and workflow management, knowledge — and management — of how to enrich and personalize customer engagements is crucial.”



Customer Service Best Practices  
**NIELSEN NORMAN**

## Nielsen Norman – Customer Service Best Practices

Vol. 6: Customer Service

Based on eye tracking, user testing, and diary studies

4th Edition

Kim Flaherty

### Providing Good Customer Service



*“Customer service information needs to be as straightforward as possible. The point of providing such information is to allow customers to help themselves.*

*If information is difficult to locate or convoluted, it defeats the purpose of providing such information.*

*Customer service areas should be tested thoroughly to ensure (users) can locate information and verify that the information provided, answers users’ questions.”*

# Guidelines (Outline)



## **Finding Customer Service Information .....18**

1. Use the terms Contact Us, Customer Service, Customer Assistance, or Frequently Asked Questions (FAQ). .....18
2. Provide a link directly to a top-level customer service page so that it appears on every page of the site in the main site navigation or at the bottom of the page.....19
3. Cross-reference high-level customer service pages, such as Contact Us, FAQs and individual policy pages. ....23
4. Link from individual customer service policies to higher-level customer service pages. ....28
5. Secondary navigation for customer-service related links should be discoverable and well-organized.....32
6. Consider providing navigational links directly to commonly requested customer service topics, such as Returns and Shipping.....38
7. Organize customer service information into logical categories. ....39
8. Link to specific policies or information in relevant areas of the shopping process, including on product pages and in the checkout process. ....43
9. If a user follows a link to customer service information from the checkout process, retain the user's data. ....49
10. Promote policies that differentiate the site from competitors (such as free returns or guarantees) throughout the shopping process.....49
11. Include help and customer service information in the site search. ....50
12. Provide customer service information on confirmation pages. ....56



**Using Customer Service Information .....59**

13. Simplify policies. Utilize straightforward, scannable presentations to make

policies more approachable.....59

14. Use easy-to-understand, simple language in customer service information. Avoid internal jargon, branded names, and industry speak without explanation.....65

15. Avoid vague or subjective policy explanations. The details matter to users.....67

16. Set expectations by labeling links to customer service information correctly, take users directly to the information they've requested. ....68

17. Provide contextual links to related policies, information, or services. This allows information to be brief, as appropriate, while referring users to more details

when necessary.....69

18. Triple-check all customer service information for accuracy and clarity.....71

19. On long pages of policy information, include jump links or a list of page content,

so users can quickly know if they're on the right page.....74

**Frequently Asked Questions (FAQs).....78**

Group FAQ questions by topic. ....78  
For short FAQ lists with fewer than 20 questions and brief answers, list all questions and answers on the same page. ....85  
For long FAQ lists, use mechanisms like jump links, accordions, filters, in-page search features or multipage hierarchies to allow quick access to topics while keeping the list manageable. ....85  
Visually differentiate the question from the answer.....95  
If frequently asked questions are listed as a searchable database, show the most frequently asked questions by default, let users search by keyword, and allow sorting by category.....98  
Reflect the customers’ priorities in frequently asked questions, not the company’s priorities. .... 101





**Returns** ..... 105

Include return instructions online; Do not simply refer users to the packing slip. . 105

Give refund options for customers making a return. .... 106

Allow returns to local retail stores..... 109

Consider offering free returns and eliminating restocking fees. .... 110

Contacting the Company .....112

30. Link to customer service information from Contact Us pages or any pages listing contact

**Information** ..... 112

31. Always provide a telephone number, along with other options for customers to contact you.  
..... 117

32. Make it easy to find options for contacting the company. ....120

Provide detailed information about availability and response times; including hours of operation for live help and expected response time for email-based help. .... 125

Pre-populate any known information on contact forms. .... 129

Don't restrict the types of communications a user can send through contact forms.....129

Don't use labels like Contact and Contact Us for general customer service pages. ....131

Allow users to receive copies of email form submissions and clearly communicate that this option exists.....135



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Consider providing live chat. ....	137
Consider when, and how frequently to promote live chat.....	139
Give users adequate time to respond to live chat inquiries. ....	142
Train customer service representatives to provide quality information efficiently..	142
Help users remember to complete their chat conversation. Make ongoing dialogues easy to relocate for multitasking users. ....	146
Consider how intrusive a chat popover should be.....	150
Position live chat so it is easily findable at all times, preferably within global header and footer, even when using time-based chat popovers. ....	155
Draw a clear distinction between Live Chat, and Q&A features. ....	159
Clearly indicate whether users will talk to a real person or an automated agent...	161
Don't require personal information to initiate a chat session. ....	163
<b>Store Locators</b> .....	164
48. Provide a store locator. ....	164
<b>Providing Shopping Assistance</b> .....	166
Offer contextual help where appropriate, by providing brief information or linking users to more detail.....	166
Make product guides and other shopping resources readily available and discoverable. Label them clearly.....	168