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OPTIMIZING SUPPORT OPERATIONS

How to build a sustainable support strategy for Salesforce solutions in **5 steps**

SERVICE SHOULD BE THE KEY TO RESOLUTION, NOT A PAIN POINT FOR THE BUSINESS

A number of very different situations can prompt you to rethink your strategies for supporting and sustaining technology solutions, from user service needs to establishing the entire technology governance of complex environments with different projects in progress.

What does not change is that only with an effective support strategy can you convert your investments in sophisticated technology solutions into productivity, performance, a positive experience for users, and a real impact of technology on business results. To achieve that, your support strategy should ensure user adoption, administration, maintenance, and the evolution of applications.

Here we present 5 essential steps to designing your technology applications support strategy to help you achieve your overall business goals.

> Our **internal service team is overloaded** and no longer able to handle all the requests.

> Our newly launched application is experiencing **low user adoption and is being underutilized.**

> A new application will be released soon, and we still **don't have a defined support**

> Our users are **unhappy with the current support service.**

> We need to **better manage the quality indicators** of our support service.

> We have different technology projects in development with different consultants, and we are **not managing processes for new implementations.**

Identify Your Support Needs

For what types of services do you need expert support?

Support Services: From User to Application

N1: User Support

End user service

Specialized User Support services are provided for the users of the applications. **The focus is to support the adoption, usability and empowerment of people who use the solutions daily**. These are the services of the first level of support and provide answers to questions about:

- Use or functionality
- Access management
- Data loads
- Report creation
- Basic settings of panels and fields

N2: Admin

Administration for the production environment

The Admin service focuses on managing the environment utilized by users and aligning it with the application's services. It takes care of:

- Managing users and their permissions
- Creating reports and dashboards
- Data load
- Evolutionary maintenance of configurations
- Support in the investigation of problems, handling of incidents related to configuration, and business rules in Salesforce

In addition, this team works directly with the development team in debug analysis and error reproduction.

N3: Application Management Services (AMS)

Progressive and corrective maintenance of processes and applications

AMS provides **maintenance, corrections and evolution of technology processes and applications to meet the new needs identified by users**. This service will ensure that applications remain valuable to users and their goals, ensuring productivity and the evolution of solutions.

Support Services: Center of Excellence (CoE)

DevOps

Quality deployments, environment management and versioning

DevOps is a methodology of integration between the **development and implementation of applications, without causing damage to operations**. These services deliver:

- Analysis and implementation of packages (deployments)
- Management of environments (creation, deletion and refresh)
- Special attention to the environments of testing (UAT) and production (accessible to users)
- Validation of Delivery Guide materials, test booklet, and Request for Change
- Mass creation of data for testing, administration of versioning tools, and
- DevOps
- Impact analysis of Salesforce platform maintenance that affects the configuration of environments

Governance

Control and governance of the production environment

This service organizes the structures and the fundamental roles for the orchestration of the projects and sustenance of the environments in scenarios that have great complexity with several projects and several suppliers.

The multifunctional committee is responsible **for leading shared good practices, traceability and change control, compliance, innovation, and the speed in delivery based on the organization's strategy, technical governance and change management vision.**

STEP 1   **STEP 2**   **STEP 3**   **STEP 4**   **STEP 5**

Scale Your Support Needs

What is the current and future state of how your customer service and support work?

What are your service tools?

Identifying the tools and software used for call management is important in designing the best processes and architecture for support services.

What is the current service

Mapping the current structure of the teams dedicated to delivering support and maintenance services, volume of calls (by type and origin), performance profiles, number of service agents, and number of hours dedicated is fundamental for the best design of the complementary support structure.

What are the service channels?

Are you using email, chat, phone, web forms, or WhatsApp? Identifying the mix of channels allows for the evaluation of optimizations and opportunities to ensure the best customer service experience. This point is also essential in understanding the end user profile and how to access it.

What is the history of type and volume of

Retrieving the service history of at least 6 months, including the number of cases, type of cases, hours, and service team members involved in the service allows for the evaluation and correct dimensioning of the team for each service request.

What are the user profiles?

Understanding the different user profiles that can trigger the support service, considering applications, access, permissions, and number of users is essential for scaling the support service.
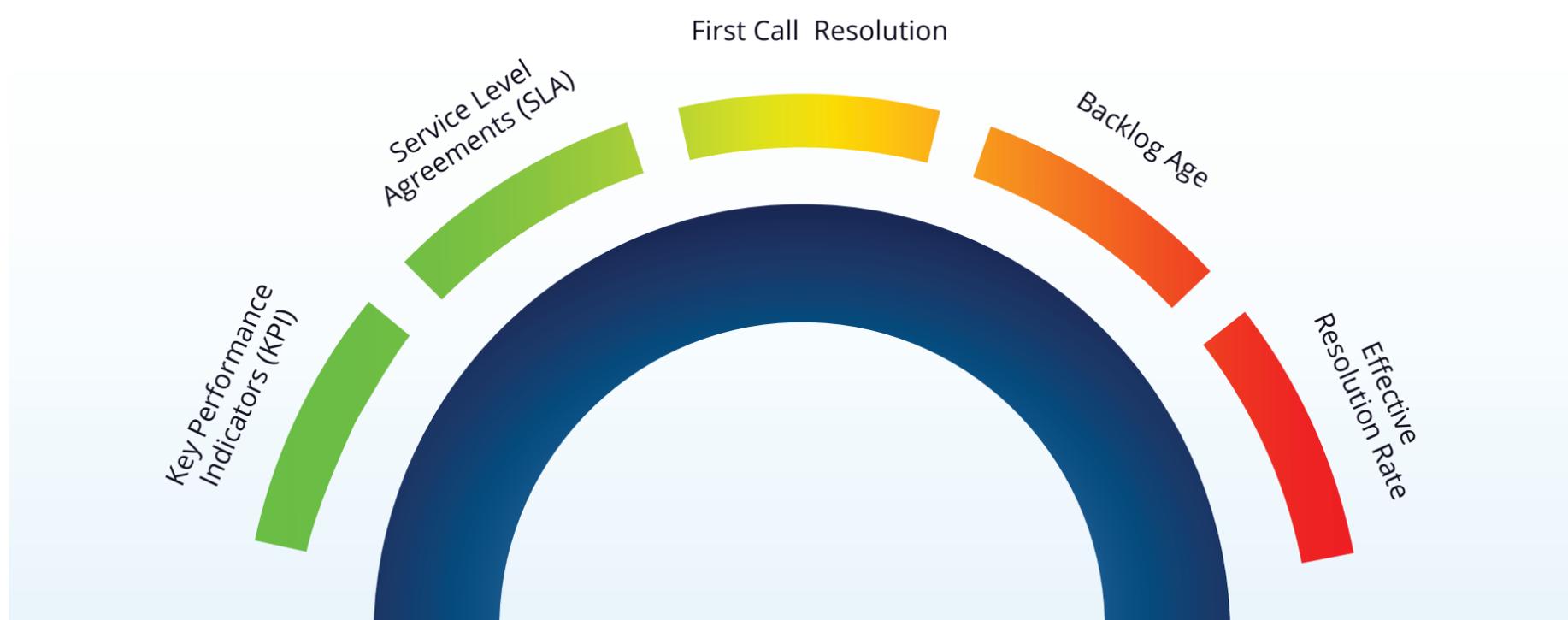
Manage Support Service Quality

How will you measure the quality of your support services?

First Call Resolution

Service Level
Agreements (SLA)

Backlog Age

Key Performance
Indicators (KPI)

Effective
Resolution Rate

Key Performance Indicators (KPI)

Define what your key performance indicators are. With KPIs for your support services, you have concrete data to analyze and make informed decisions to optimize your customer service experiences, productivity and the positive impact of technology on your business.

Service Level Agreements (SLA)

Establish the Support SLAs. The SLA makes the service level tangible with classification criteria, resolution time, and solutions or penalties if the agreed indicators are not achieved. In addition to good market practices, it's essential to understand the context of the organization itself in the construction of the SLA in a clear, objective, and measurable way.

First Call Resolution

Always try to solve the request during the first service contact. This measures the number of calls made and resolved in the first contact with the support team through channels with dynamic and real-time interactions (phone, chat and WhatsApp). The high index of this KPI indicates the strength and maturity of the service team because the customer is served quickly and effectively.

Backlog Age

Control the resolution time of requests. This evaluates the age of the tickets still open, counted from the creation to the closing of the request. Tickets should be grouped into ranges of days. The longer they are open, the more attention needs to be given to it. The focus is on resolving the user request, even if the SLA has already been violated.

Effective Resolution Rate

Ensure that completed cases have the requester's approval. This indicator evaluates the percentage of cases completed with the validation or approval of the requester. It is directly linked to the evaluation of the support service experience. Just closing the case without solving the needs of the person who requested it can lead to a new call (rework for the team) and the guarantee of customer dissatisfaction.

Align Support Services With Data Protection Laws

How can you ensure your compliance with GDPR, GDPL and other privacy laws?

Support services involve the use of customer data, which requires compliance with General Data Protection Law (GDPL) in Brazil, General Data Protection Regulation (GDPR) in the European Union, and other regional data privacy laws. The risks of leakage or inadequate handling of information are permanent, and its the organization's responsibility to manage compliance in an uninterrupted, sustainable way.

These laws should be used as a reference for structuring a productive technology architecture, capable of providing security to the support service for users, companies, and partners. To achieve this, the service must be understood as part of the organization's structure and practice of DevOps and technology governance.

The ultimate goal is to have a controlled process for data protection, support agents, support partners as well as customers and their users. And two pillars are fundamental:

Matrix of roles, boundaries and responsibilities

Set the limits and access levels for each profile

Among the internal team, the team of partners, and users of your service solutions, you must define the roles of each profile, responsibilities and limits, actions allowed, and profiles blocked within the environment of production. From this matrix of responsibilities, the focus should be to establish the smallest possible group of people with full access permissions.

Audit and governance

Define governance and audit processes over the environment and support profiles

In conjunction with the Admin/DevOps and General Governance processes of the solution implementation environments, the support environment should receive special attention due to the large volume of personal data handled. The goal is to ensure continuous control of access, permissions, and data flow.

Deploy Your Support Services

The digital transformation of business does not end with the new app's go live

The process of adopting the new platform is critical to the success of the investment. It's no use having a highly sophisticated solution that took many hours to develop and then not have the usability and adoption of it.

Your service and support strategy is key to enabling the productivity of end users of technology solutions, whether internal or external.

The support team needs to receive functional and technical training on the project, as they will need to guide users on possible business rule questions, how to navigate the system, map improvements, and even incidents.

Two elements are fundamental to a successful launch of support team operations:
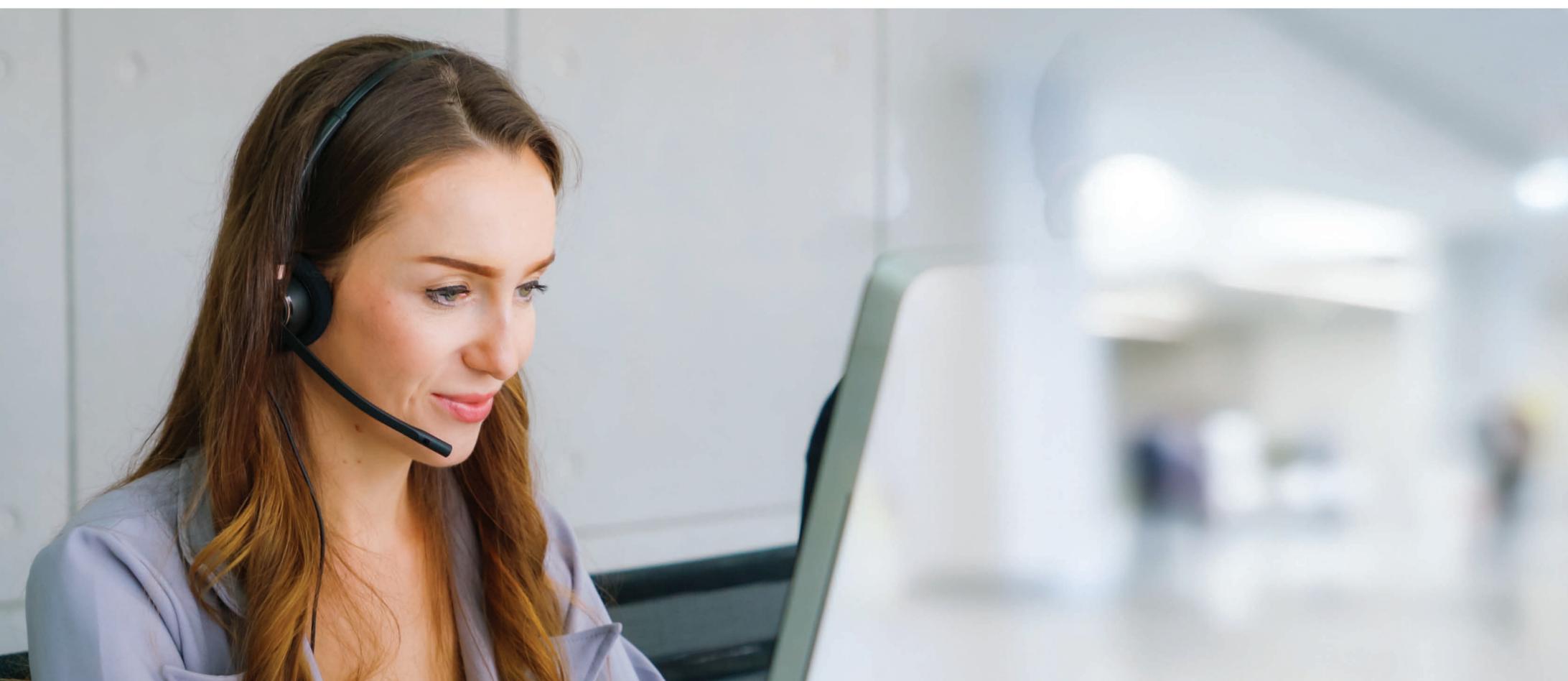
Phase out development to support

Plan the transition from project delivery by the development team to the support team

Phase Out is the transition moment when the development team delivers a project (in the agile or waterfall model) and the service and support team takes ownership of meeting user requests from the launch and use of the application. This transition allows end users to rely on the service and support team from the beginning, contributing to the organization's adoption of the new technology.

Knowledge transfer

Build the processes and documentation that will enable knowledge transfer

A well-structured **knowledge transfer** guarantees that knowledge is passed from one team to another, ensuring that the processes, rules and criteria adopted by the application are clarified, functioning as resources the support team uses to deliver services to users within of the defined SLA. It even allows the entire training load necessary, so the entire team stays constantly up-to-date.

The 5 Steps

Identify your support need

- Support Services:
  From Users to Application
  - N1: User support
  - N2: Admin
  - N3: Application management

- Sustenance Services: Center of Excellence (CoE)
  - DevOps
  - Governance

STEP 1

STEP 2

Scale your support needs

- Service tools
- Current capacity
- Service channels
- Types and volumes of service
- User profiles

Manage support service quality

STEP 3

- Key performance indicators (KPIs)
- Service level agreement (SLAs)
- First call resolution
- Backlog age
- Effective resolution rate

STEP 4

Align support services with data protection laws

- Matrix of roles, boundaries and responsibilities
- Audit and governance

Deploy your support services

- Phase out development to support
- Knowledge transfer

STEP 5

Service Framework

Service design

business context and dimensions for the service journey

Solution design

technology design and governance on the Salesforce Platform

agile management of people and teams in implementation of solutions

Support

support, administration, maintenance and evolution of applications and solutions

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Support is an essential part of any technology strategy — ours too

Ongoing service is the practice of our service framework focused on sustaining technology.

It is a set of essential solutions to ensure user adoption, administration, maintenance and evolution of applications on the Salesforce platform. It allows managing change safely and adopting a center of excellence in technology governance practices for good application performance and systems reliability.

Discover how to build a complete and personalized support service for your business.

Talk to one of our experts to learn how OSF Digital can help you with your strategy.

Connect with us

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Salesforce expert support and maintenance strategies for the best return on your investment

Support			Center of Excellence	
User Support	Admin	Application Management Services	DevOps	Governance