knowledge17

WORK at LIGHTSPEED™

Customer Service at Epicor Software

IAN ASHBY
SENIOR VICE PRESIDENT , GLOBAL SUPPORT
Epicor Software Corp

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servicenow

Speaker Introduction



Name: Ian Ashby

Title: Senior Vice President, Global Support

Function: Support & Maintenance Services

Company: Epicor Software Corp.

EXPERIENCE: 20+ years in technology companies: from large & quoted through to small VC-backed startups

EXPERTISE: Operational, Commercial, Strategic

ACHIEVEMENTS: Successful implementation of ServiceNow for Customer Service at Epicor as part of a major Business Transformation project

CURRENT PROJECTS: Executive sponsor for ‘EpicCare‘

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Agenda for Today

- Epicor Overview/Introduction
- Context
- The Case for Change: EpicCare
- Critical Choices and Decisions
- Planned Benefits
- Implementation Waves and Timelines
- System and Process Specifics
- Business Results
- What's Next?

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Epicor at a Glance

EPICOR

grow business not software™



~20,000 customers

3,800 employees

150 countries

70+ products

~$1 billion revenue

Complete Value Chain Solutions – B2B & B2C
The World's 5th largest ERP Software Provider

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Our Customers

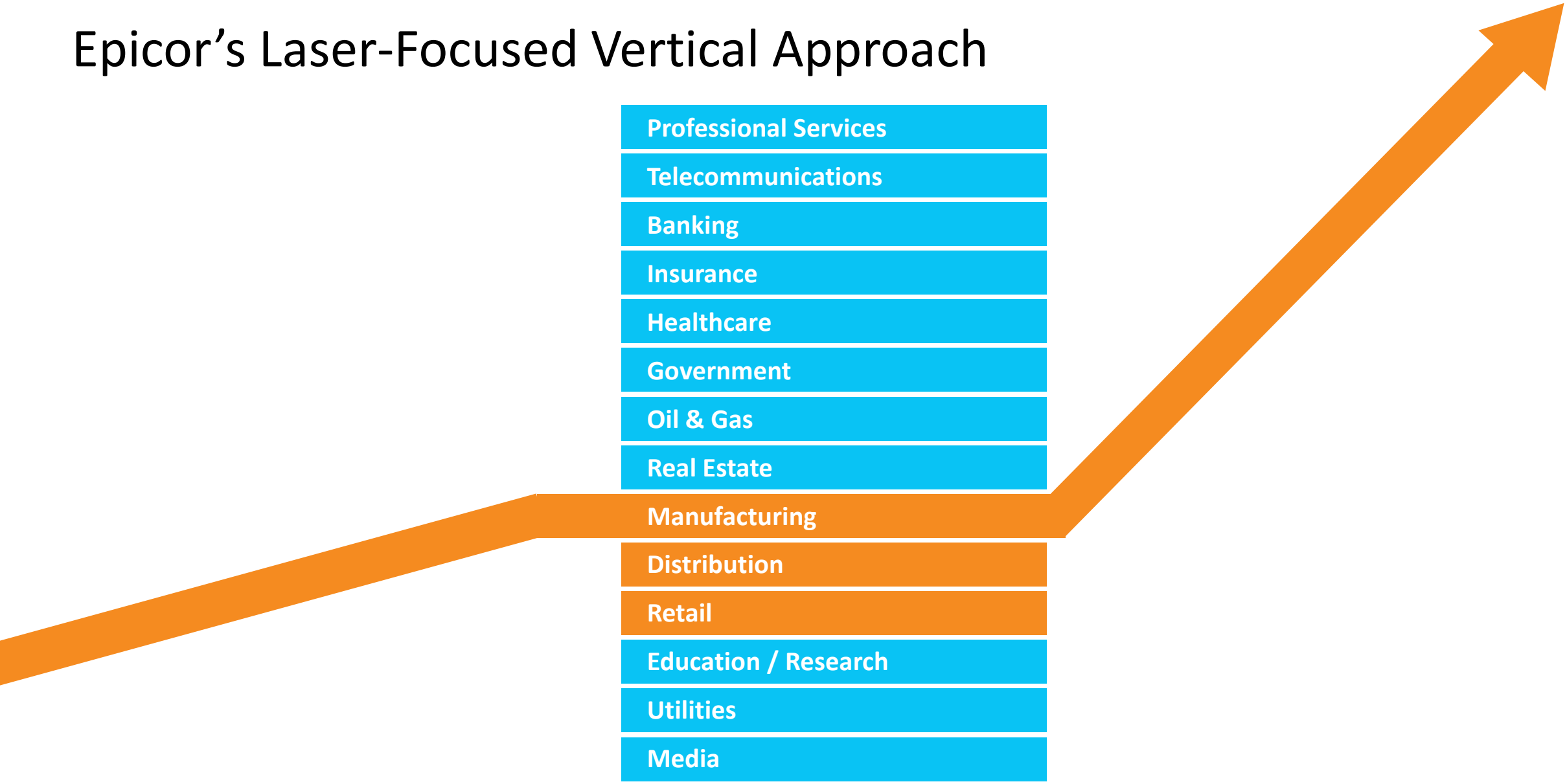
Lehigh Hanson HEIDELBERGCEMENT Group
Rexel
Standex
Applied Industrial Technologies
sonepar
MS National Multiple Sclerosis Society
Hyatt
Energizer
DXP
tyler technologies
True Value
Aquarium of the Pacific
Manufacturing Institute
K2
Heidelberg
Rev-A-Shelf
United Electric Supply
Chicago Bulls
Metastorm
JELD-WEN Windows & Doors
Black Hawk Industrial
SA Source Atlantic
ACE
Affinity Federal Credit Union
Petitti Garden Centers
Heidenhain
AGIE CHARMILLES
HAJOCA
Leggett & Platt Incorporated
Zippo
Despatch Industries

Industry Recognized Solutions

Gartner
Nucleus Research
TEC Technology Evaluation Centers
2016 Gold Stevie Winner
Best of 2014 mittelstand
Info Security Products Guide 2015 Global Excellence Awards
ROI Awards 2015
CRN Channel Chiefs 2015
Network Products Guide IT World Awards 2015 Finalist
CIO 100 Honoree 2013
Industrie Preis 2014 Best of

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Epicor’s Laser-Focused Vertical Approach



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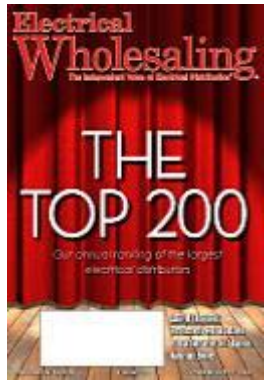
Vertical Approach Example: US Distribution

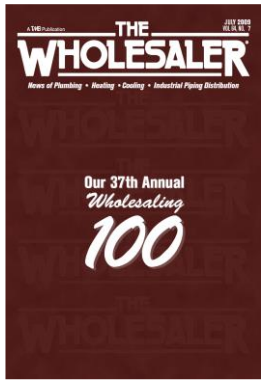
60% of Industrial Distribution's Big 50

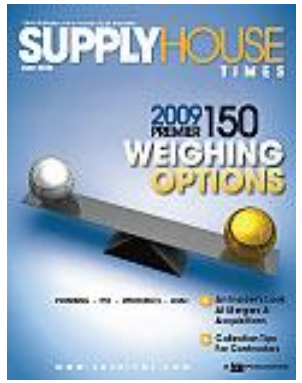
56% of Electrical Wholesaling's Top 200

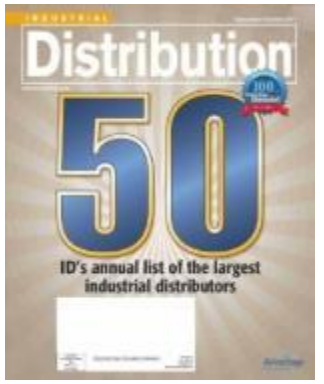
49% of Supply House Times' Premier 150

39% of The Wholesaler's Top 100









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Why Epicor

Flexibility informed by best practices



Flexible solutions backed by a team that knows industry best practices

Continuous innovation



Visionary solutions delivered to provide business benefit

Deep industry knowledge and vertical expertise



Solutions and services designed by a team with deep knowledge of your industry

Customer-obsessed service and support

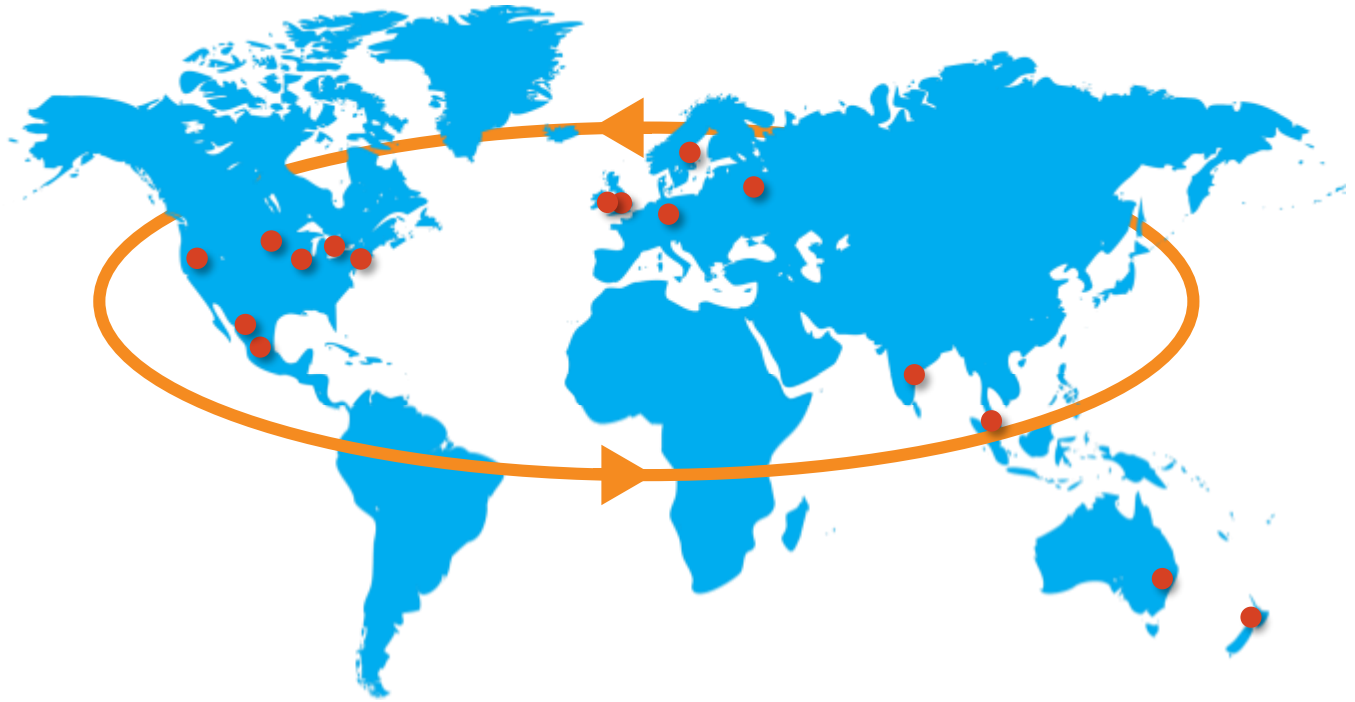


Customer-first philosophy across the business – from solution delivery through implementation and support

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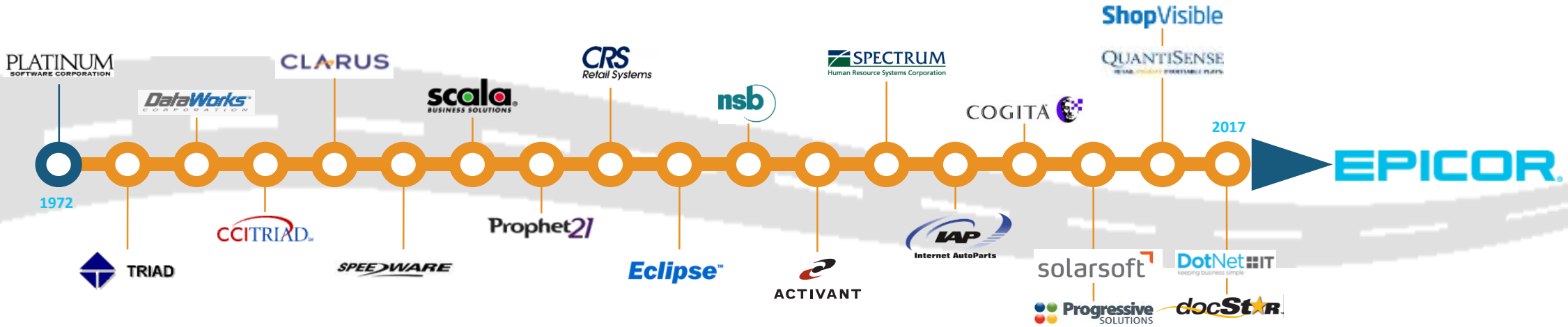
Epicor Support Overview

- Support for EPICOR SW, TECHNOLOGY, AND THIRD-PARTY SW PRODUCTS
  - Support & maintenance fees are approximately 50% of company revenues
- 16 MAIN SUPPORT CENTERS
  - From New Zealand to Europe to the Americas….
  - Newest support center in Bangalore, India (the ITC)
- Providing support in 21 LANGUAGES
- Handling c. 500,000 SUPPORT CONTACTS P.A.
- PHONE, PORTAL AND E-MAIL
- Supporting CUSTOMERS and PARTNERS



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Epicor's Evolution



- Multiple acquisitions, mergers and shareholder changes over 40+ years
- Complexity and Systems proliferation, especially in support operations

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The Challenge!

15+ Support Systems …





… and 50+ Customer Portals!

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EpicCare
Customers for life



THE CASE FOR CHANGE: EPICCARE

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Customer Survey Results

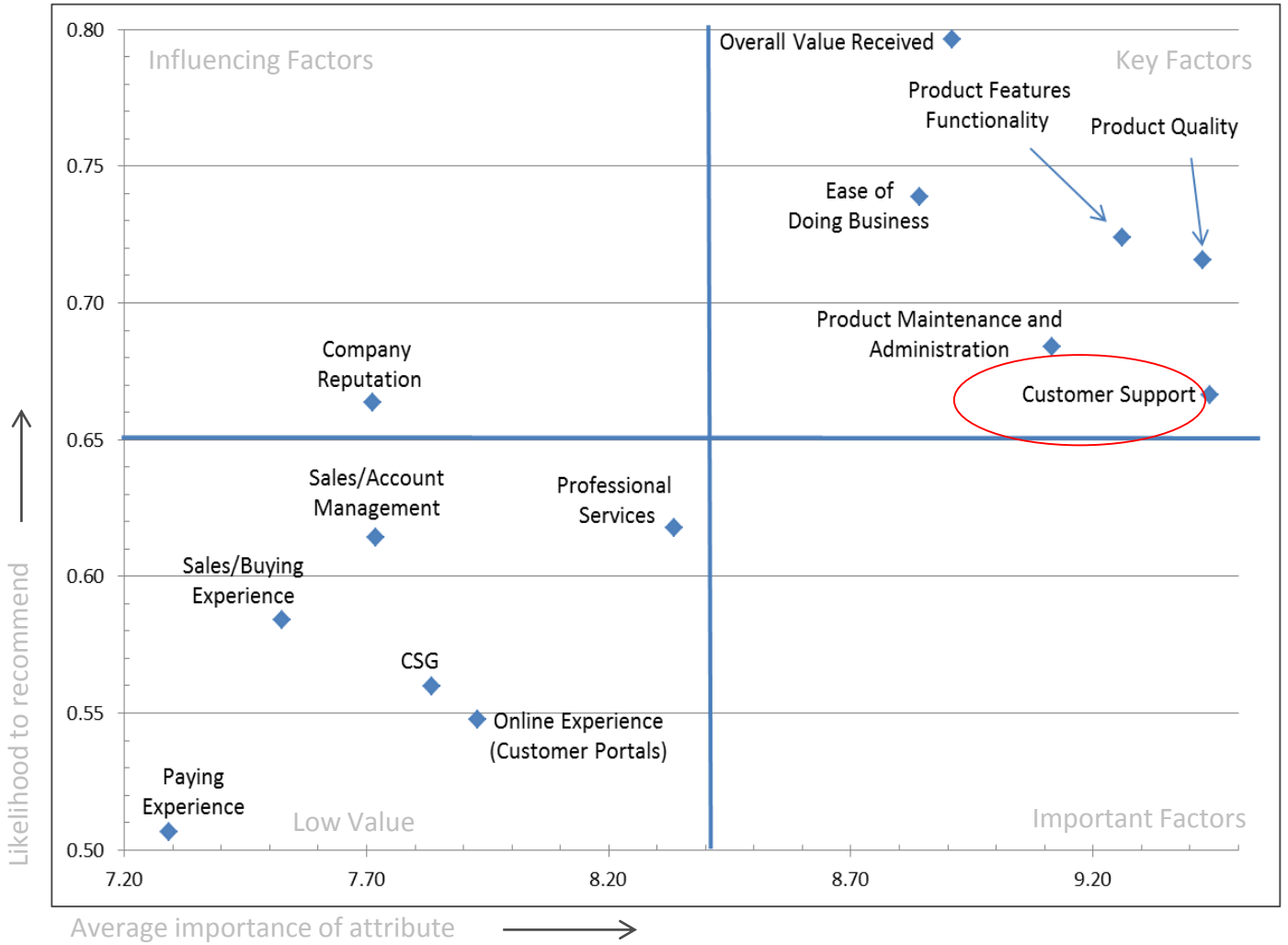
"Single biggest change you suggest we make to improve your overall Epicor experience?"



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A Word on Performance Analytics and NPS

- Improving attributes requires cross-business function engagement
- To drive any improvement, measurement of current state and definition of target state is required
- Current Metrics don't provide the necessary granularity or accuracy
- EpicCare offers an opportunity to re-evaluate current business metrics and embed new metrics into the new system



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CRM

Our Critical Choice

Service Mgmt



- **Customer relationship management** (**CRM**) is a system for managing a company's interactions with current and future customers.
- It often involves using technology to organize, automate and **synchronize sales, marketing, customer service, and technical support.**
- Today's CRM software is highly scalable and customizable, allowing businesses to gain **actionable customer insights** with a back-end analytical engine, view **business opportunities** with predictive analytics, streamline operations and **personalize customer service** based on the customer's known history and prior interactions.

- ITIL is the process of aligning enterprise IT services with business and a primary focus on the delivery of **best services** to end user (customer)
- ITIL focuses on delivering services such that that the end-user **experiences the most desired result**
- **Focus is on standardizing**
- Measures the **operational efficiency** in meeting service level expectations
- ITIL is a **comprehensive suite of best practices**

… BUT with an External Focus!!

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Our Decision

- To PARTNER with ServiceNOW to deliver the EpicCare platform: a COMMON AND CONSISTENT SUPPORT SYSTEM underpinning the service we deliver to ALL OF OUR CUSTOMERS & PARTNERS, FOR ALL OF OUR PRODUCTS, GLOBALLY
- To focus on GETTING THE SYSTEM IMPLEMENTED and rolled out across the entire company as part of 'Phase 1'
  - With the minimum of true 'customizations'
- Then to move into a 'CONTINUOUS IMPROVEMENT' phase
  - Delivering service improvements to Customers and Partners
  - Improving the user experience and efficiency for our Support Analysts



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Expected Benefits of The EpicCare Program

EpicCare
Customers for life



↑ CUSTOMER SATISFACTION

- Ability to Anticipate Customer Service Requirements
- Improved Responsiveness to Customer Calls & Service Delivery
- Making it Easier to Do Business
- Improved NPS



REDUCED SERVICE COSTS

- Complete Charge Capture of Service Delivery
- Improved Technician Productivity
- Reduced Time in the "Service-to-Cash" Cycle



STREAMLINED WORKFLOW

- Improved Processes & Technologies
- Automating Manual Processes Where Appropriate
- Separation of Case and Service Request (pre-defined workflows)



IMPROVED SERVICE LEVELS

- Vastly improved analytics and service controls
- Standardized Operating Model
- Ability to Deliver Consistent Service (Globally)



ENHANCED QUALITY & GROWTH

- Modularity for Supporting Growth
- Improve Quality and Reduced Costs
- Maximized Cross-selling and Up-selling opportunities
- Ability to leverage services as a Competitive Advantage

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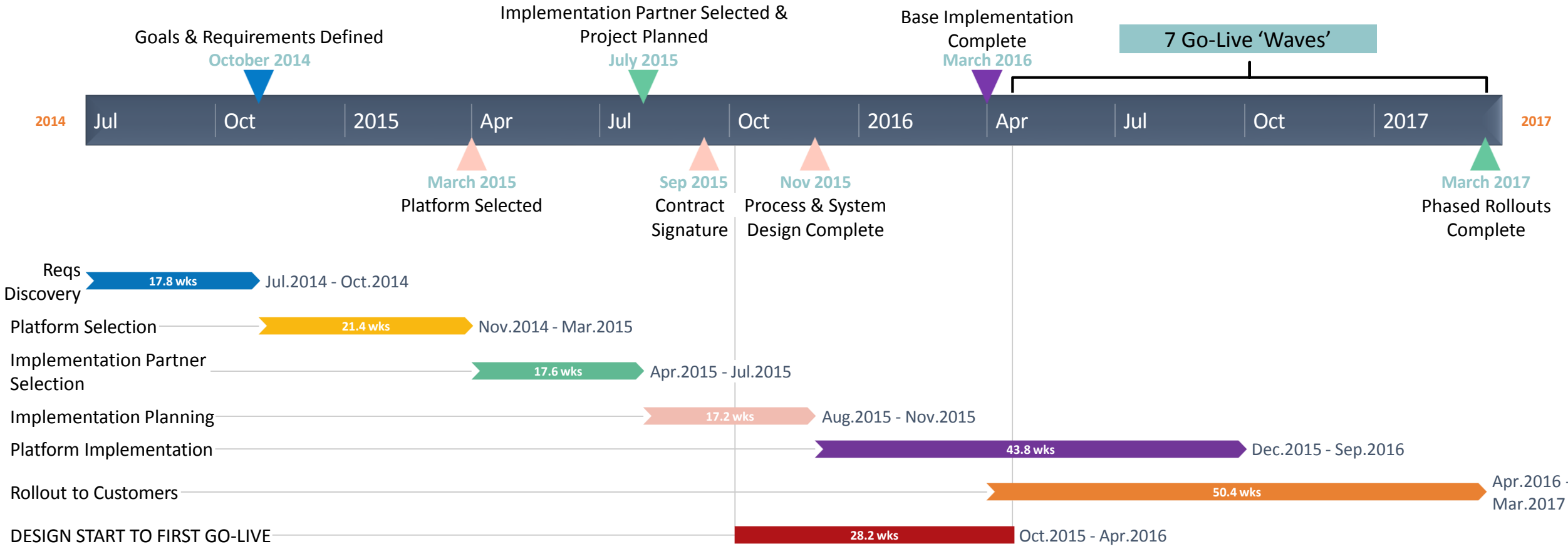
How We Have Positioned EpicCare



- TRANSFORMATIONAL project focused on improving the overall customer experience
- Major investment, driven from customer feedback
- Combination of SYSTEMS and PROCESSES
  - A SINGLE SUPPORT SYSTEM across all products, all BUs, all geographies, based upon the ServiceNOW platform
  - CONSISTENT SUPPORT PROCESSES, leveraging best-in-class ITIL/ITSM practices, driven by Command Center team
- Move to Knowledge-Centric Support (KCS)
- Continuous improvement focus

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EpicCare Implementation Timeline



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EpicCare Major Changes

EpicCare
Customers for life

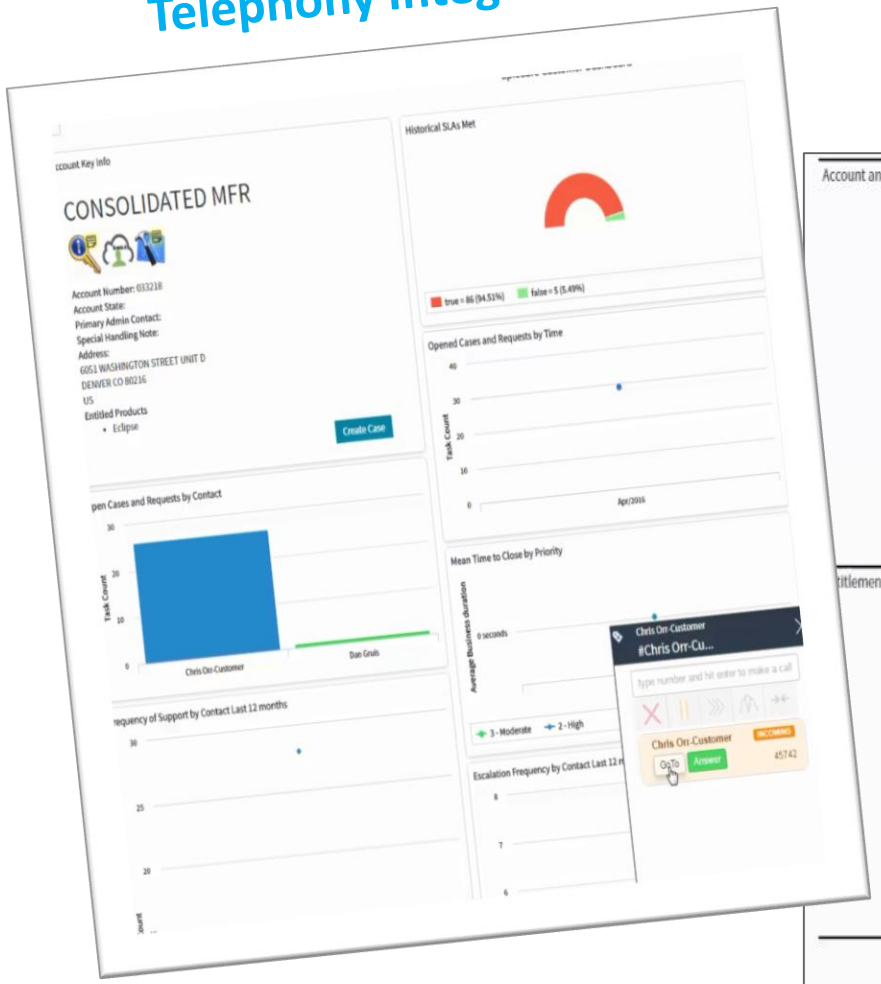
Customer Management	Business Data	Case Handling	Workflows	Other Capabilities
► **Entitlement**: Faster, Embedded Customer Attributes (Icons), Caller ID	► **Customer Data Integrated** with Epicor Business Systems	► **Customer Need**: Case, Problem (Defect), Service Request	► **Service Catalog** for commonly requested services	► **Common Reporting** and Metrics to drive CSIP
► **Dashboards**: Account Summary, Queues, Metrics	► **Support Managed Data** maintained in EpicCare: Contacts, Entitlements, Asset Details, …	► **Knowledge** usage embedded in Case, breadcrumbs	► **Email Hub** Receiving, Sending, Notifications	► **Single, Global System** driving Service consistency
► **Designed to Measure**: SLAs, SLTs, KPIs	► **Customer Configuration Management**	► **Process Integrated** with Non-support Stakeholders	► **Appointment** scheduling	► **Single Sign-on** for Agents
► **Survey** Mgmt		► **Positive Call Closure**	► **Time Management**: Tracking, Billing, Normalization	► **Collaboration capabilities** including chat, concurrent updates
► Enhanced **Portal**, Self-Help				

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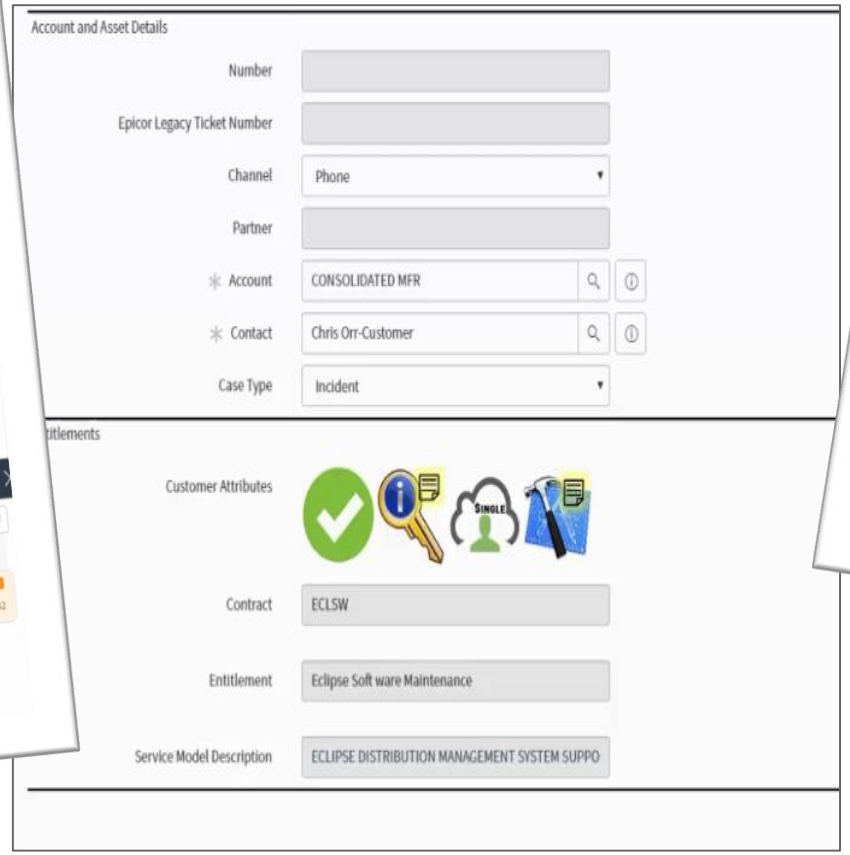
EpicCare: Transforming Epicor Customer Support

EpicCare
Customers for life

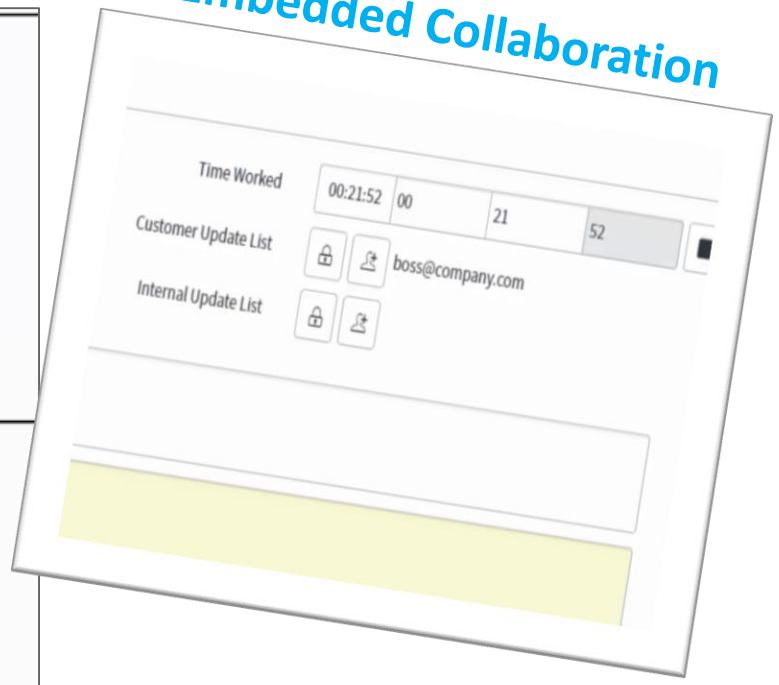
Telephony Integration



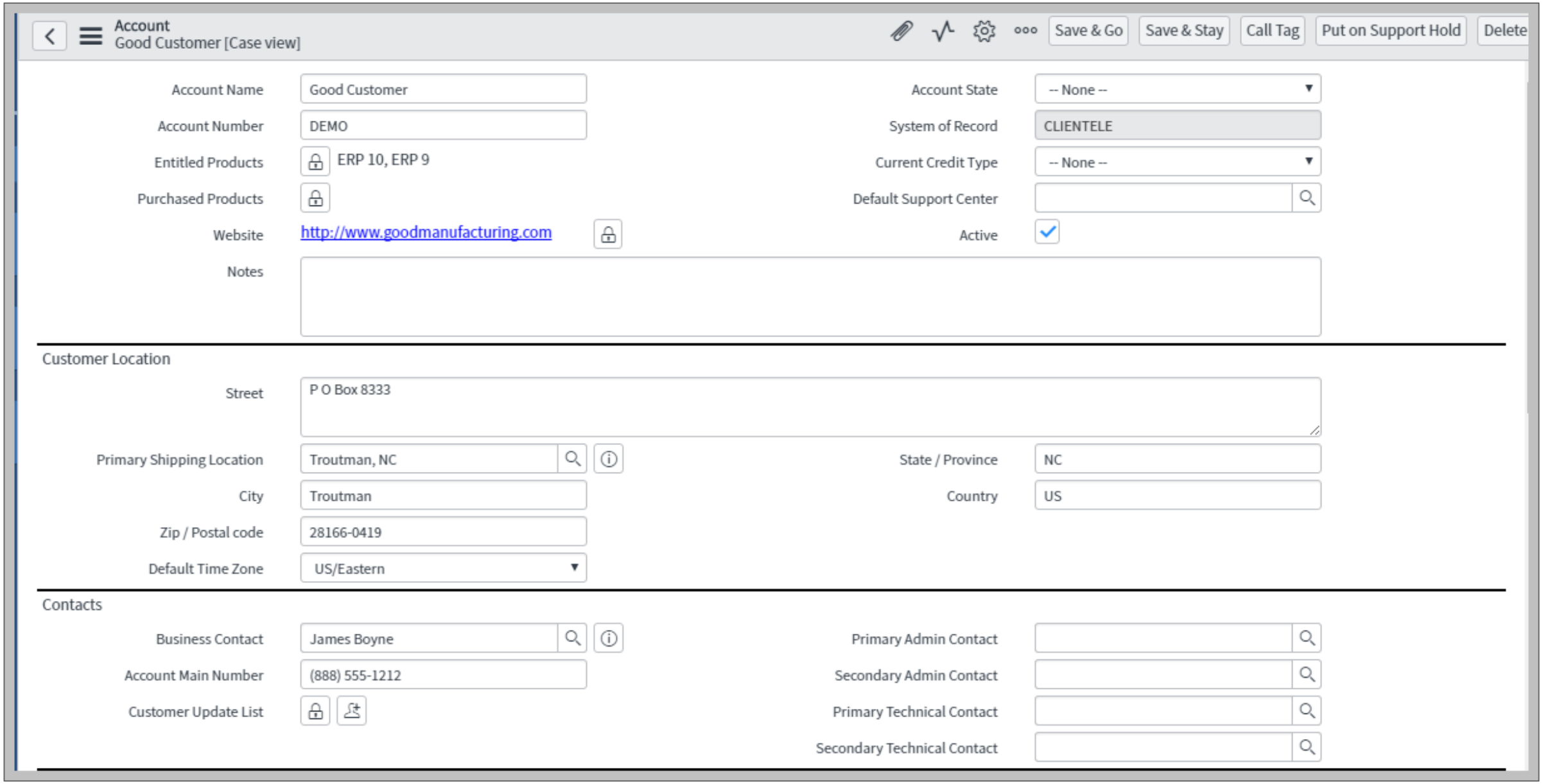
Knowing Our Customer



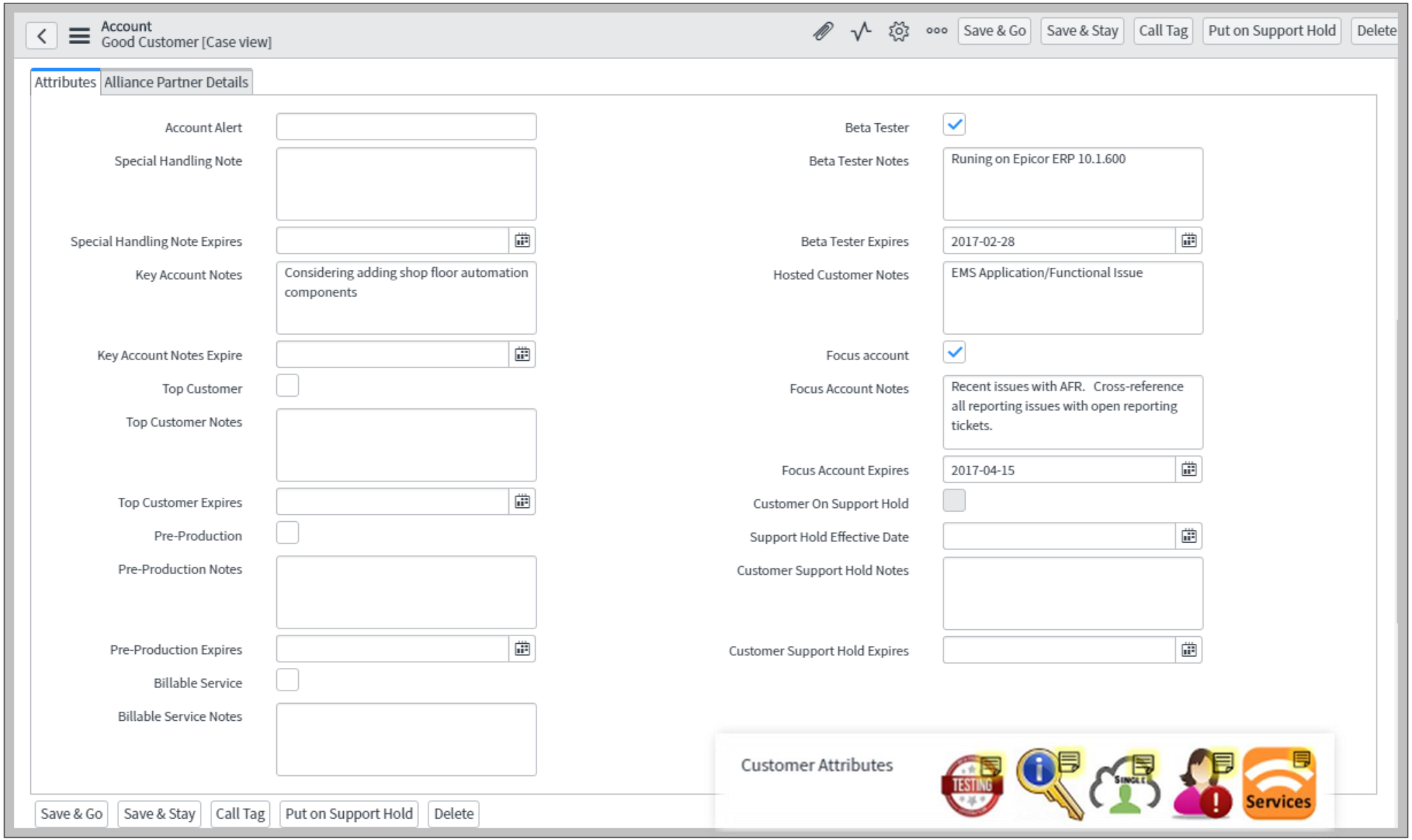
Embedded Collaboration



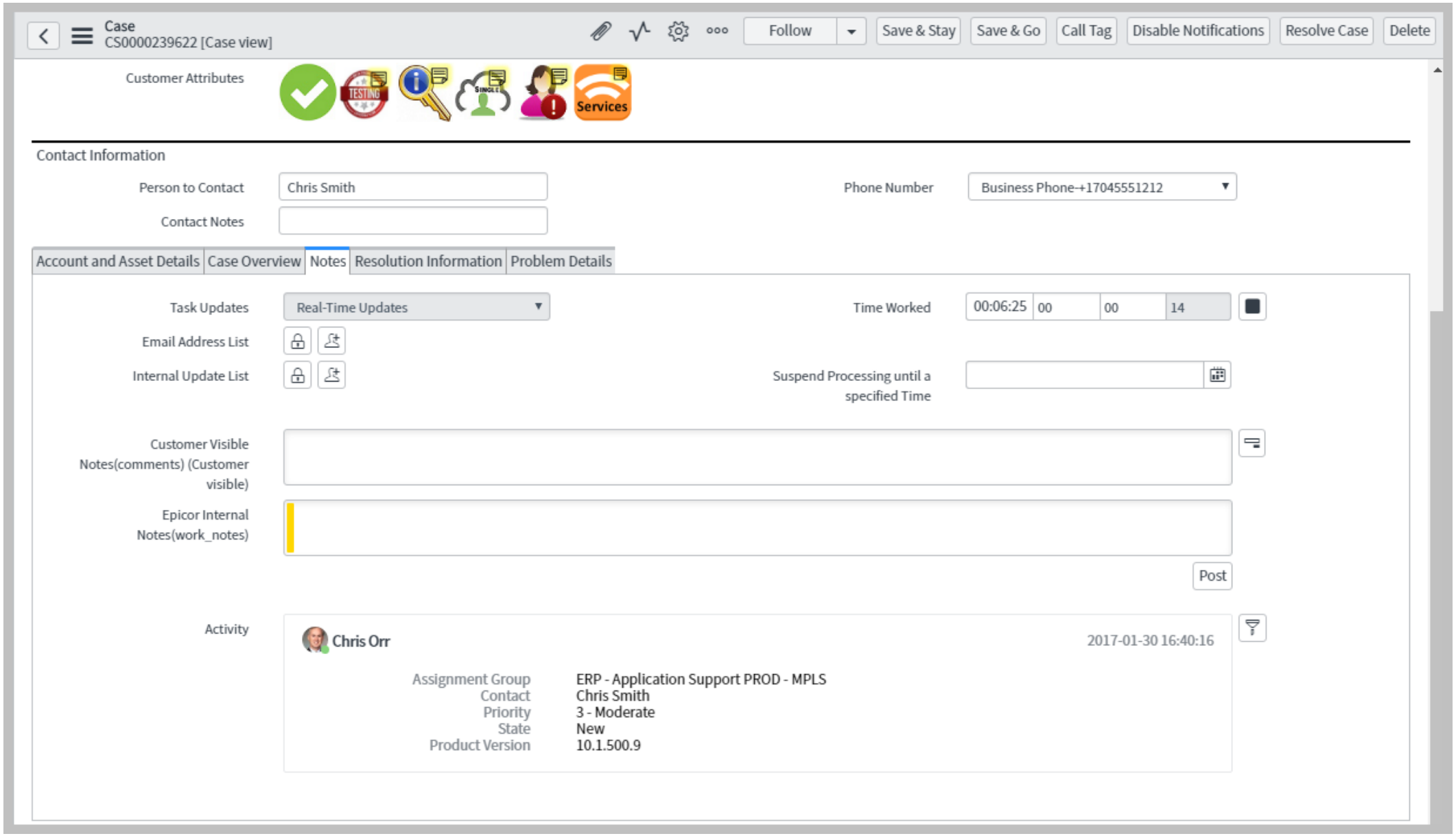
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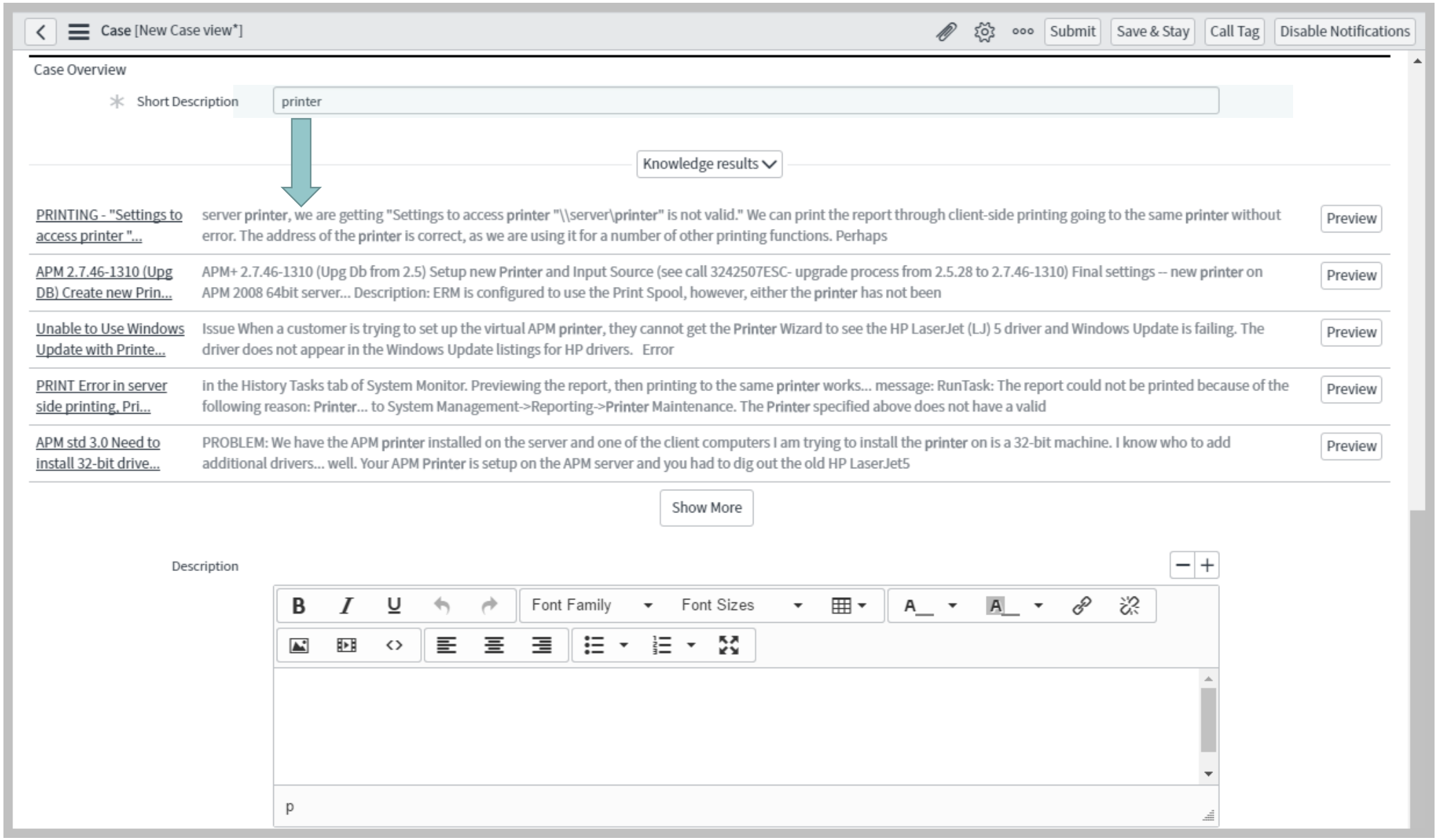
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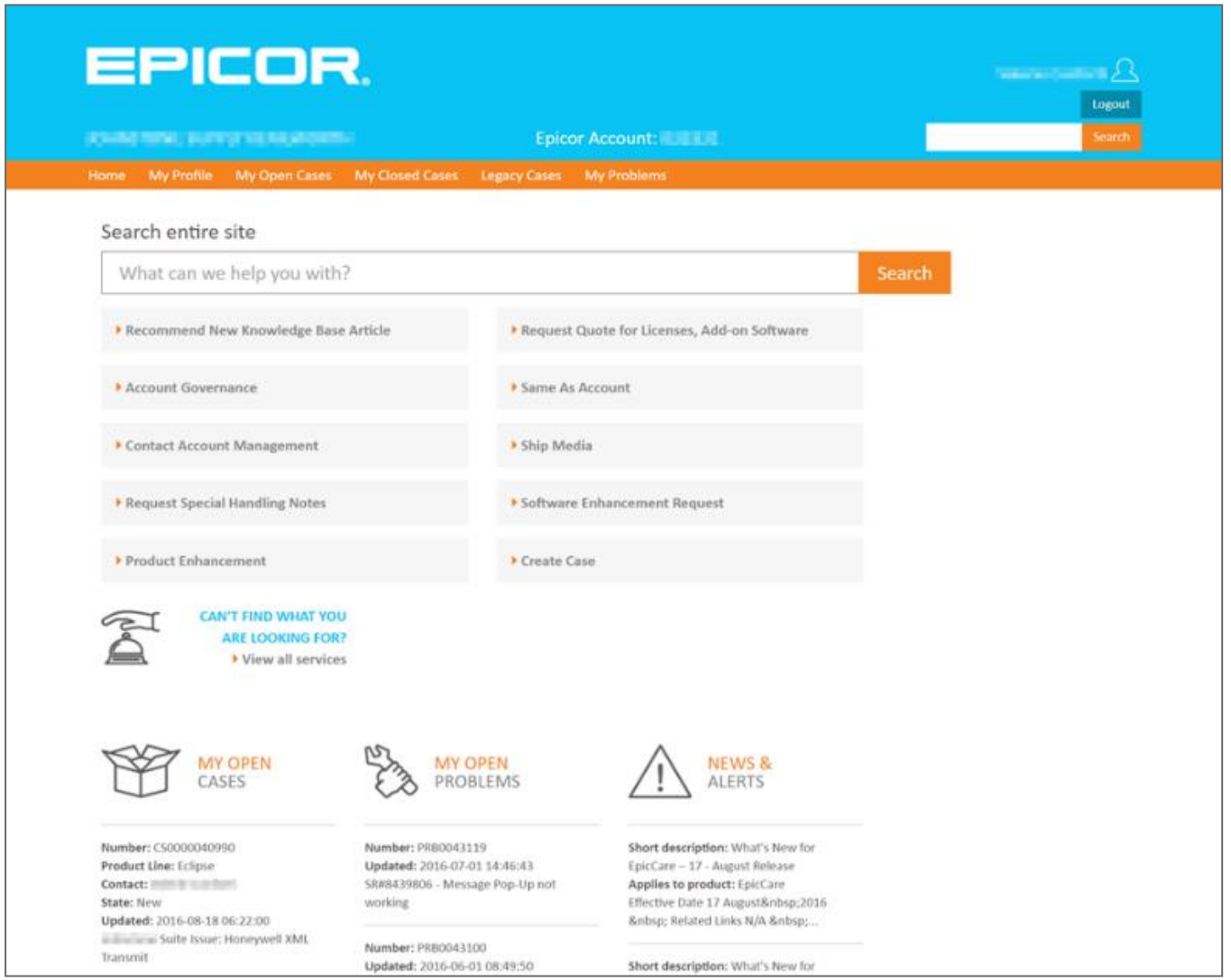


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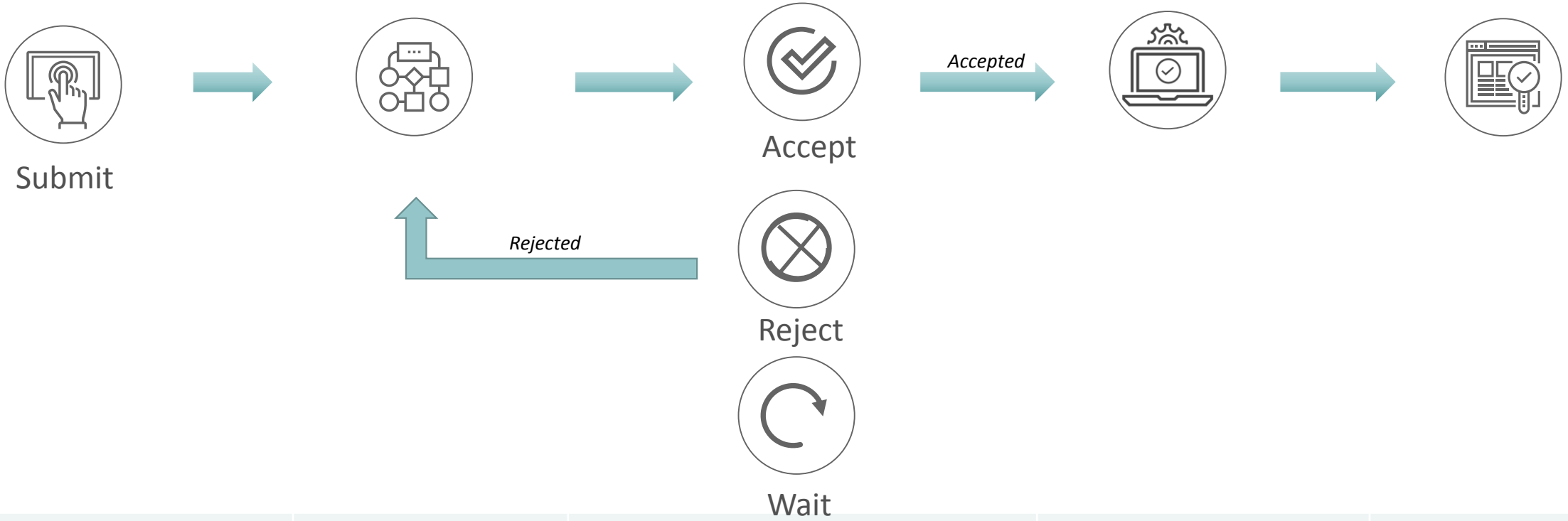
EpicCare Customer Portal



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Epicor Case Management and Positive Case Closure (PCC)

Submission → **Solution Determined** → **Solution Proposed** → **Solution Accepted** → **Quality Review**



Case is submitted to Epicor Support. The selected Asset, Category, and Subcategory are used to route the case to the best support team.	Epicor works the request. Multiple teams may be involved in the determining a solution. Case Work notes show the progression of the Case.	Once a solution is determined, the solution is proposed to the customer and they are notified via eMail along with several remnders. Customers can choose to … • **Accept** the solution • **Reject** the solution • **Wait** – This option requires that the customer is registered on the Portal. The customer chooses the number of days to Wait and the Case will be suspended until that time after which the cusitomer will again be notified via eMail on these options.	If **Accepted**, the Case is marked as closed and customer accepted. If **Rejected**, the Case is returned to In Progress with a Status of "Customer Reactivated". If **NO customer response** is received after the several requests, the Case is marked as auto-closed.	Immediately upon closure, the Epicor Survey Process is initiated and the Case moves into the Quality Review process.
State = New	State = In Progress State = Awaiting Customer	State = Resolved	State = Closed	

#K
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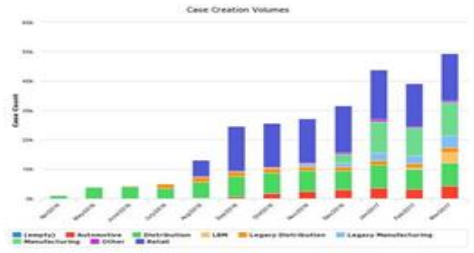
EpicCare Implementation Size



Products: 71
Product Models: 25k Supported; 264k Total
Customer Assets: 804k Supported; 1,592k Total

Red Bull
Energizer
Despatch
LEHIGH HEIDELBERGCEMENT Group
Zippo
AGIE CHARMILLES
JELD-WEN WINDOWS & DOORS

Accounts: 19k Entitled to Support; 41k Total
Contacts: 51k Active for Support, 25k Portal Users; 100k Total
Partners: 764 Partners with 4,646 Contacts



Cases created Apr 16 - Mar 17: 286k
Cases worked Apr 16 - Mar 17: 430k
Archived Cases: 6.3m

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EpicCare Customer Feedback

"It's a HUGE improvement over the old system of calling in issues… Before, I would get an email with gibberish in it about each ticket. Now it's in English and is much easier to follow. Now I feel far more comfortable having my staff call in issues and I won't have to be the only IT guy! What am I going to do with all of my free time? Good Improvement."

– Retail Customer

"What an improvement, the new portal is amazing, have been looking forward to it since Insights. I used the old one all the time and was constantly frustrated by it, now it's everything you hope for out of a modern support portal. Especially like the formatting in the Knowledge Base, the old character based one was embarrassing to pass onto my users and I used to reformat before sending out. Great work to everyone involved!"

– Distribution Customer

"You can actually drop screen shots right into the website, that is HUGE! You can also reply to a case notification email with a screen shot, again dropped into the email, and it attaches it. Just those two things and the ability to simply reply by email to the cases is HUGE, and many steps forward"

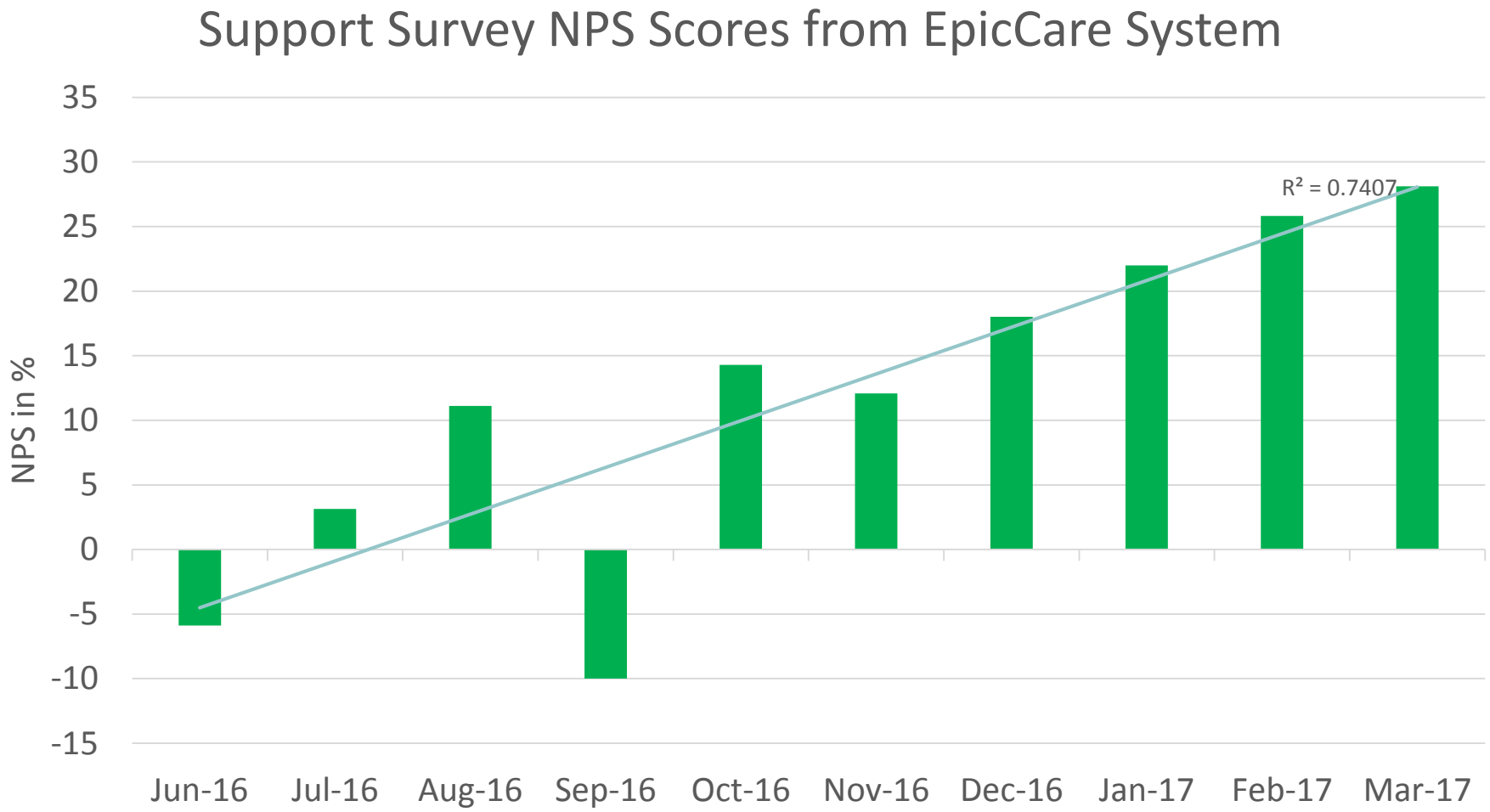
– Distribution Customer

"I appreciate the vision and direction of the EpicCare concept. The new electronic case management system is much better than the old Oracle database"

– Distribution Customer

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And Most Importantly…
Early Indication of NPS Improvement….



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What's Next for ServiceNow at Epicor ?

- EpicCare global rollout now complete
- Moving to EpicCare Continuous Improvement phase
- Upgrade EpicCare from Geneva to Istanbul
- Continued partnership with ServiceNow for Customer Service
- ServiceNow used for other parts of Epicor
  - Internal IT move already underway
  - Other areas?





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Take the Survey

Please take a moment to complete a session survey in the Knowledge17 app.

Thank You

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