

Customer Relationship Case Study Profile

Customer: National Customer Service Company
 Location: West Chester, PA
 Contact: William Smith, VP of Technical Support
 Phone: (555) 555-1000
 Date: February 24, 2003

A. General Customer Background

Customer Demographic Categories	Response
Length of time personally involved with the CRM Software	4 years
Number of licenses presently authorized/in use at the respondent's facility	100 licenses
Vertical Customer/Market Segment	Computer/IT Services Organization

B. General Product Evaluation Factors

General Product Evaluation Factors	Perceived Product Importance	Perceived Product Performance	Gap
Importance/Performance of the CRM Software Product to the organization's day-to-day operations	4 (very important)	3 (just as expected)	- (1)

C. Primary Sources of Service And Support

Primary Sources of Service and Support	Response
Primary source of telephone technical service and support	Publisher-Direct (i.e., National Software, Inc.)
Primary source of on-site service and support	Publisher-Direct * (i.e., National Software, Inc.)

* "I don't think we've ever had anybody actually come out to our site, other than the salesguy. Everything we need done, we get done over the phone."

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D. Product-Related Evaluation Factors

Product-Related Evaluation Factors	Perceived Importance	Perceived Vendor Performance	Gap
Software quality	5	4	-(1)
System reliability	5	4	-(1)
System functionality	5	4	-(1)
State-of-the-art technology	4	3	-(1)
Cost of the software per license	4	3	-(1)
Reputation of the software publisher	4	3	-(1)
Ease of software use	4	2	-(2)
Ease of upgrading the software	4	3	-(1)
Quality of system documentation	4	2	-(2)

Rating Scale:

Importance:

5	Absolutely essential
4	Very important
3	Somewhat important
2	Somewhat unimportant
1	Not important at all

Performance:

5	Much better than required
4	Better than required
3	Just as required
2	Worse than required
1	Much worse than required

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E. Service and Support-Related Evaluation Factors

Service and Support-Related Evaluation Factors	Perceived Importance	Perceived Performance	Gap
Quality of user training	5	3	-(2)
Quality of telephone technical support staff	5	3	-(2)
Professionalism of telephone technical support staff	4	3	-(1)
Product knowledge of telephone technical support staff	5	2	-(3)
Quality of on-line technical support	4	4	-
Ability of the vendor to resolve problems quickly	5	3	-(2)
Overall responsiveness to inquiries/requests	5	3	-(2)
Ability to reach the right person, the first time	4	3	-(1)
Availability of after-hours or weekend tech support	4	1	-(3)
Ease of executing software patches	5	2	-(3)
Following through on requests	5	3	-(2)
Getting the job done	5	3	-(2)

Rating Scale:

Importance:	5	Absolutely essential
	4	Very important
	3	Somewhat important
	2	Somewhat unimportant
	1	Not important at all
Performance:	5	Much better than required
	4	Better than required
	3	Just as required
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F. Statements

Our service and support vendor ...	Agree/Disagree
Understands our use of the software in our business applications	(3) Agree somewhat
Is responsive to our technical service and support needs	(3) Agree somewhat
Is committed to continuous service improvement	(3) Agree somewhat
Is easy to deal with	(3) Agree somewhat
Responds to our tech support calls on a timely basis	(2) Disagree somewhat
Is flexible with respect to its service contract agreements	(4) Agree strongly
Has the necessary product knowledge to get the job done	(2) Disagree somewhat
Completes all of the required work to our satisfaction	(2) Disagree somewhat
Consistently meets our service and support expectations	(2) Disagree somewhat
Fixes the problem right the first time	(2) Disagree somewhat

Rating scale:

Agreement:

4	Agree strongly
3	Agree somewhat
2	Disagree somewhat
1	Disagree strongly

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G. Problem Areas/Possible Areas for Improvement

Problem Areas/Possible Areas for Improvement	How Often a Problem?
Delivering what is originally promised	(3) Sometimes
Responding to our tech support calls in a timely manner	(3) Sometimes
Resolving a software problem correctly the first time	(3) Sometimes
Following through on problem resolution	(3) Sometimes
Getting a system "fix" in a timely manner	(4) Rarely
Receiving after-hours or weekend technical support	(2) Frequently
Communications with telephone technical support	(3) Sometimes
Ability to get a quick answer to an important question	(3) Sometimes
Prompt response for after-hours or weekend support	(1) Always

Rating scale:

Problem Frequency:

5	Never a problem
4	Rarely a problem
3	Sometimes a problem
2	Frequently a problem
1	Always a problem

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H. Service and Support Importance/Performance/Change

Service and Support Evaluation Factors	Response
Performance of the tech support received for our software	(2) Worse than required
Change in level of tech support performance over the past year	(2) Worse than last year *

* "Their tech support over the past several months isn't anywhere as good as what it was in the past. Their new release came out a few months ago, but we're still using the previous one. I think their tech support people have been better trained on the new release, but they never quite got it all together on the release we're using. This is becoming a real problem, and we've talked to them about it already - but nothing is apparently being done. If it gets much worse, we're going to have to do something!"

Rating Scale:

Performance:

5	Much better than required
4	Better than required
3	Just as required
2	Worse than required
1	Much worse than required

Change:

5	Much better than last year
4	Better than last year
3	Same as last year
2	Worse than last year
1	Much worse than last year

I. Recommendations/Renewals

Recommendations/Renewals	Response
Likelihood of recommending the software to other organizations	Yes; but with some reservations *

* "I would tell them to be careful that they protect themselves once a newer release becomes available. That's when their service performance really began to take a hit with respect to supporting their older versions, like the one we're using."

Rating Scale:

Likelihood to Recommend:

- Yes; without reservations
- Yes; but with some reservations
- No; I would not recommend the software

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J. Perceptions of the Way in Which the Vendor Conducts its Technical Service and Support:

Perceptions of Tech Support Performance	Yes / No
Accessible	Yes
Committed	Yes
Competent	Yes
Courteous	Yes
Flexible	Yes
Helpful	Yes
Honest	Yes
Knowledgeable	No
Professional	Yes
Prompt	No
Quality-minded	Yes
Responsive	No
Skilled	Yes
Understanding	Yes
Willing to Listen	Yes

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K. Verbatim Comments

- “We’ve been using their software for a long time, and they’ve generally always come through for us on our tech support requests. However, they’re a little rough around the edges and there’s been no real improvement over the past year in fact, things have actually gotten a little worse!”
- “We were getting everything we needed until we expanded our usage to include weekend and after-hours shifts. They really haven’t risen to the occasion. We have to call them two or three times to make sure they respond on the weekend. We keep leaving them messages, but we don’t always hear back. This is becoming a major problem, and we are thinking about switching vendors the next time we look at upgrading the system - probably next year around this time.”
- “They seem to know most of the answers to our questions, but they don’t respond very quickly. Their telephone tech support isn’t as sharp as some of our other software vendors in other areas. We’re willing to give them another chance, but if they don’t show some major improvement in the few months or so, we’re going to have to start knocking around some heads!”
- “The software isn’t the most easy to use, and it seems to crash every once in a while for no apparent reason - at least to us! We’re not really sure whether some of the repeat tech support calls we have to make are due mainly to inherent software bugs, or just the support techs not knowing exactly how to assess the problem right the first time. Sometimes it takes too long for them to get the software back up and running. This leads us to believe that maybe they really don’t know where the problem is sometimes. This is a real problem - and it’s not getting any better!”
- “We had a big problem with them last year. It’s all been fixed now, but they really got me in trouble with my supervisor. It all centered on an issue of what was ‘in coverage’, and what was not in, according to our new contract. The lesson I learned is that everything I do with them - everything they promise me - has to be put in writing! If it’s in writing, they’re rock solid. But if it’s not in writing, there’s always a potential argument.”
- “They’re really slow to respond on the weekends. If we make a call for tech support on the weekend, their phone response time is very slow. For example, we called in for service at 4:30 in the morning, but it wasn’t until 9:00 am [the next day] before they responded.”

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K. Verbatim Comments (continued)

- “They’re [i.e., the telephone tech support staff] very professional and friendly, and they always try to keep on top of things. But the company’s tech support training is pretty poor - as is its self-support technical documentation. As a result, we have become too dependent on their service techs, although we might want to take over some of the easy fixes ourselves to save time. However, their user training and documentation has to get better before we could ever attempt to do any of that.”
- “Most of the time, they meet our tech support expectations. However, when they don’t, they really tend to fail miserably! They’re generally pretty good, but they’re certainly not consistent - especially from one support tech to another - and you never get the same one. I guess their in-house tech training program isn’t so good. Sometimes we think we know their software applications better than some of their own techs do!”
- “When something goes wrong, there’s a lot of finger-pointing in their organization. Sometimes I think that it takes them so long to return our phone calls because they’re trying to figure out who to blame before they call us. It’s never their own fault - always someone else’s within their organization!”
- “Overall, their tech support has been okay - but some of the edge has come off over the past year. Things that we don’t complain about often enough have a tendency not to be fixed. We continuously have to complain before certain things finally get done. For example, it took me about four months of complaining before they finally put a patch in the software so that the system wouldn’t shut down every two weeks or so. It’s a lot better now, but it took a great deal of constant complaining.”
- “We’ll be thinking about a total system upgrade in about a year. I’ve already started casually checking out some other software packages to replace the one we’re using - but I’m afraid to make a complete break away from the software we’re presently using - at least we already know where it doesn’t work! Still, I know from some of my associates at other companies that some of these other vendors provide better support on the weekends or after hours. I’ll really have to check them out before it’s too late.”

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L. Customer Assessment

Overview

- High importance is placed on the use of the software; however, the tech support they receive is “worse than required”, and has deteriorated from one year earlier.
- Only uses telephone tech support directly from the publisher. No on-site support has been used since implementation. Publisher-direct support is basically okay on weekdays, but a growing problem after hours and on weekends.

Product/Service Points of Vulnerability

- Product knowledge of telephone support staff (Significant)
- Availability of after-hours or weekend support (Significant)
- Ease of executing software patches (Significant)
- Quality of user training (Moderate)
- Quality of telephone tech support staff (Moderate)
- Ability to resolve problems quickly/overall responsiveness (Moderate)
- Following through on requests/getting the job done (Moderate)

Potential Points of Disconnect

- Responds to tech support service calls on a timely basis (Moderate)
- Has the necessary product knowledge to get the job done (Moderate)
- Completes all of the required work to customer satisfaction (Moderate)
- Consistently meets service and support expectations (Moderate)
- Fixes problem right the first time (Moderate)

Existing Problem Areas

- Prompt response for after-hours or weekend technical support (Significant)
- Receiving after-hours or weekend technical support (Significant)
- Delivering what is originally promised (Moderate)
- Responding to tech support calls in a timely manner (Moderate)
- Resolving a software problem correctly the first time (Moderate)
- Following through on problem resolution (Moderate)
- Communications with telephone technical support (Moderate)
- Ability to get a quick answer to an important question (Moderate)

Negative Performance Trends/Perception

- Technical support performance is perceived as both “worse than required” and “worse than last year” (Significant)
- Not believed to be “Knowledgeable”, “Prompt” or “Responsive” (Significant)

Potential “Kick-Out” Factor

- Considering switching to another software vendor next time they plan to upgrade the system (Significant)