As you may have heard, we are organizing our Support department into teams to provide a more seamless support experience for our clients. Each support team will be assigned to a particular sales person, and will support that person’s client base. Here are the specifics:

**Team Concept**

We will be forming teams that will be comprised of a Tier 1 and Tier 2 support person, a sales person and an engineer. Each team will handle support issues from clients that have been assigned to their sales person. Tier 1 members will handle phone calls and perform troubleshooting of client issues as well as general project resolution duties to the limit of their training/ability. Tier 2 members will handle phone roll-over and escalated cases from Tier 1, as well as project resolution duties. Engineers will provide pre-sales support to their sales person, and detailed engineering support assistance to their Tier 2 technician, in order to expedite more complex client issues. Sales people will act in a relationship management role with the client.

**Call Flow**

There will be two basic call flow trees:

*General Support line* – There will be a general support number that will ring all Tier 1 support members regardless of team. The Tier 1 member will then attempt to hot transfer the call to the appropriate team’s Tier 1 support member, or their Tier 2 member if Tier 1 is not available. If neither is available, they will attempt to help the client. If no one from tier one is available, then calls flow to tier 2. If tier 2 is not available, then engineering should pick up this line and either take a detailed message, or help the client, depending on the situation.  (As time passes, calls to the general support line should slowly be reduced. Changes in scheduling should also prevent large gaps in call coverage, unless support experiences a large number of incoming calls where all available agents are on the line. The idea is to remove engineers from being the initial contact on regular support calls, unless absolutely necessary.)

*Team Support line* – Each team will have their own support line, which will be distributed to their client by the sales person after Deck has won the project. This line will ring the Tier 1 team member, roll over to the Tier 2 member, then the Sales Person in that order. (The Sales Person, at that point, will act in a relationship manager role and take pertinent information for either the Tier 1 or Tier 2 team member, whichever is available first.)

Call groups have been set up according to this call flow process, and the appropriate queues and phone numbers are now live. (Team phone numbers are at the bottom of this document.)

**Support Technician Outbound Calls**

The Tier 1 technician will be making two outbound calls to the client:

*Pre-deployment Call:* As part of the process following the winning of a project by a sales person for Deck, the Tier 1 team member for that Sales Person’s team will contact the client and introduce themselves as the client’s “Deck Support Representative”. The technician will verify that team’s contact information with the client, as well as any parts of the project that are outside of the norm that may affect support, and pass any pertinent support information to the client now, including the new commissioning form engineering has developed:

<http://support.deckmonitoring.com/entries/21345693-click-here-to-link-to-our-thorough-commissioning-checklist-online-form>

*Schedule Installation Call:* Logistics is in the process of rolling out a company-wide calendar. This will give us the ability to schedule a technician to be available when the client installs their system. We will attempt to get installer information from the client, contact the installer, and have a technician available when the installer is working. During this scheduling call, send the installer all pertinent support documentation for their review prior to the install date, including the above commissioning form. (We should have this capability within a week or so.)

**Sales Force and Zendesk**

Sales Force will still be the relationship manager for the Sales team. Support is moving away from using SF cases (which are difficult to track, and lack functionality that the Support team needs) and will be using Zendesk. Zendesk will be integrated with Sales Force so that each client in Sales Force will have a Zendesk section that will show all related Zendesk tickets for that client. Zendesk will show Client information pulled from Sales Force. Zendesk will also be the repository for knowledgebase articles that are either client or DECK only facing. This repository is already up and working, and the client-facing topics and articles can be seen at <http://support.deckmonitoring.com/forums>. Eric Leisy in marketing has a generic login for sales people that will allow you to login and see DECK facing only articles. We are still making some adjustments to Zendesk, but it will be taking inbound support emails soon. Clients will also have the ability to submit their own tickets through a customer facing portal in Zendesk.

**The Teams**

Here they are, with phone numbers:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Team 11-971-266-5522 | Team 21-971-266-5530 | Team 31-971-266-5527 | Team 41-971-266-6418 |
| T1 | Rodney | Steve (Eugene) | Justin | Nicholas Craig |
| T2 | Yonatan | Nate (Eugene) | Paul Nist | Paul Ogden |
| E | Jason Child | Keith Rossman | Mike Ray | Brian Pelowski |
| S | Scott DeWitt | Jim Sandberg | Kaitlin Borstelmann | Larry Lowery/ Andy Rocker |