Reduce cost and increase you ability to support your customers: Integrating Customer Support and Defect Tracking— an architecture for success

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Introduction

In today's fast moving business environment it is important to provide customers with timely support when problems occur. Effective customer support keeps customers happy and improves your ability to keep them as a customer. Customer Support modules within CRM systems provide this functionality.

Customer problems may be ones that can be resolved with a known or researched solution. Some problems, though, cannot be resolved in this way. These problems involve the design of the product or software. Many companies today use Defect Tracking Systems to help them track and manage these issues. These same systems can also help them manage feature and enhancement requests, and help plan and document product releases.

Companies get best results when they integrate Customer Support and Defect Tracking.

This reduces costs and increases the speed at which defects can be identified and resolved.

Frequently the Customer Support system and the Defect Tracking System are separate pieces of software. Usually they do not talk to one another. So when a support problem needs to be reported to Engineering, first the Support Agent needs to document the problem, and then the Engineer has to enter this data into the Defect Tracking System. And the Engineer may not have access to all the information collected by Customer Support, and may have to retrace steps already taken by the Support Agent.

Companies who get the best results from their Customer Support and Defect Tracking development systems are those who use integrated system. Maintaining two different systems has many costs and issues. They cost more to use and support, and they inhibit the flow of information to engineering of possible product problems, and the flow of information to support about problems that have been resolved.

Soffront CRM offers this integration. Soffront pioneered this in 1992 with the first integrated Defect Tracking and Customer Support solution.

System definitions

Defect Tracking

Defect Tracking systems allow Development Engineers and QA Engineers to track and manage defects, feature requests and enhancement requests. Usually there is a process where QA validates the defect, then Development resolves the defect, and QA verifies the fix.

The systems are often also used to help plan, manage and document new releases of the product.

Customer Support

Customer Support systems provide various ways for customers to report problems: phone, fax, email, through a customer portal, or though a chat session. The Support Agent will try to provide a resolution to the problem. They often use a Knowledge Management system to assist in the search for a resolution.

If the problem is a defect, then the Support Agent will not be able to resolve it, and must pass it to Development for a fix.

Problems with systems that are not integrated

If these functions are handled by two separate systems, a number of issues occur. The first is that Development notification of defects becomes a manual process. This requires time from both the Support Agent and the Engineer just to handle the information. Also it is not a real time process, so there are inevitable delays.

Then the defect must be logged into the Defect Tracking System. The Engineer may not have all the information that was collected by the Support Agent, and may have to repeat steps done by the Support Agent. When the defect is resolved, the notification of the Support Agent is another manual process.

> Systems that are not integrated require more time and effort from the users, inhibit the timely flow of information, and have increased costs to operate and support.

Additional issues may come from the differing terminology and language used by the two different systems. This only adds confusion for the users.

Also, comprehensive reporting and analysis of customer-related defects and their resolution becomes almost impossible.

These problems can be avoided by the use of a system that provides an integrated solution, like *Soffront CRM*.

Benefits of Integration

When Defect Tracking and Customer Support are integrated, companies find:

- Customer defects are identified and resolved faster.

- The cost of collecting defect data is greatly reduced.

- Development and QA engineers spend more time working on issues and less time collecting information about bugs and defects.

- When the defect is resolved, customers are notified more rapidly.

> Integrated systems enhance your ability to detect and resolve problems, improve your capacity to keep your customers happy, and cost less to use and operate.

- Customer Support agent time is better used and productivity improves.

- Customer Support and Development use a common language and terminology, which makes their communication more effective.

- Comprehensive reporting and analysis of customer-related defects is now possible.

The results of these improvements are direct and immediate. They consist of improved customer support, increased customer retention, and improved productivity for Development and QA Engineers, and Customer Support Agents.

Other benefits include improved morale for Customer Support, Engineering and QA teams, and improved customer support and defect data.

Soffront CRM"s integrated architecture make these benefits available.

The Architecture of Integration

Integrated Defect Tracking and Customer Support systems will share a common database, user interface, and reporting tools. Typically, the systems will provide notifications to the responsible Development Engineer and QA Engineer when the Support Agent has created a new defect. A well-designed

> Integrated systems provide for timely notification of problems to engineering, and for automatic notification of the support agent when the problem is resolved.
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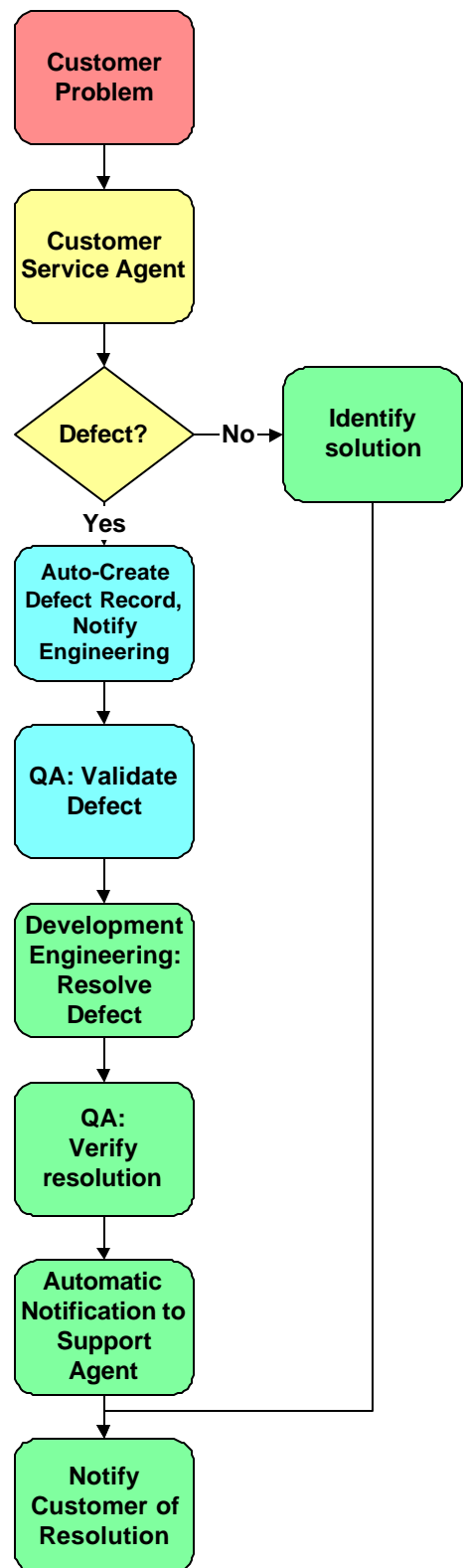> An integrated system improves management's data for these critical issues.

system will also provide a workflow for Defect Resolution that includes the QA processes as well as the Development processes.

This workflow both disciplines the process and makes it easier for the user to effectively use the system. When the defect is resolved, the well-designed system will also provide immediate notification of the resolution to the Support Agent, and then allow him to notify the customer and close the support ticket.

Typical Integrated Workflow

The flowchart shown to the right shows a typical workflow for the Support Agent, QA Engineer and Development Engineer.

Customer Problem

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Customer Service Agent

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Defect? — No → **Identify solution**

Yes ↓

Auto-Create Defect Record, Notify Engineering

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QA: Validate Defect

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Development Engineering: Resolve Defect

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QA: Verify resolution

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Automatic Notification to Support Agent

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Notify Customer of Resolution

Soffront

Conclusion

Integration of Defect Tracking and Customer Support provides significant benefits. These include improved customer satisfaction and retention, improved productivity of Development and QA Engineers as well as Support Agents.

Further benefits flow from a common reporting and analysis tool that provides management with improved visibility of these critical processes and issues.

> Integrated Support and Defect Tracking Systems provide many benefits.
>
> These benefits include increased capabilities, decreased costs, and improved measurement and communication.

One more set of benefits comes from the use of common systems. This reduces training time, system administration, and improves communication for all involved by implementing common terminology and language across these functions.

The costs of not integrating these systems are great. Perhaps one of the largest costs is the reduced productivity of the company's most expensive resource — the Development Engineer.

Soffront CRM provides integrated Customer Support and Defect Tracking, and an integrated workflow between the two systems.

To find out more about integrated Customer Support and Defect tracking call Soffront Software at 510-413-9000, or email sales@soffront.com.

About Soffront

Soffront Software Inc. has the experience, technology, and focus for mid-market companies seeking a CRM software solution.

A pioneer in the CRM market since 1992, Soffront offers web-based, end-to-end, fully integrated CRM solutions. These solutions are available either as a hosted/ASP or as on-premise software.

> *Soffront CRM* is powerful, flexible and affordable. With Soffront you can have the exact CRM solution you need to get the results your business requires.

With more than 500 CRM installations worldwide, Soffront's installed base includes Fortune 500 companies, mid-sized businesses, federal agencies and local/state governments. Soffront is privately held, debt-free, and profitable since 1995.