

Rethinking Application Support

CIMdata Commentary

Key takeaways:

- *PTC Global Support has been re-engineered to align with customers' needs based on extensive customer feedback*
- *PTC's support offerings can be personalized for individual users via a new web portal, and include pro-active, social components*
- *Support is embedded within PTC software to provide quick access to traditional support features as well as the capability to provide contextually-relevant answers delivered within the application*

Software Support Drives Full Value of PLM

Developing a product, bringing it to market, and supporting it through its operational life are at the core of a product company. Applying the latest Product Lifecycle Management (PLM) enabling technology ensures that the latest and most complete product related information is captured and managed using the applicable control processes throughout the product's lifecycle. But ensuring that a company is receiving the full value from its PLM software investment is not a one-time event; it's a continuous process. To deliver short- and long-term value to individual users and their business organizations, all of the appropriate software enhancements, diagnostic assessments, technical best practices, and technical resolutions must be utilized properly throughout the lifecycle of the PLM applications.

Just as manufactured products have a lifecycle, so, too does the PLM enabling software that supports them. Software solution providers offer support services to ensure their customers will receive the expected return on their software investment. But "maintaining" software today is not strictly about reactive fixes. A PLM environment, when managed well, is a source of competitive differentiation. Therefore, customers expect the applications to support their business requirements, and that their IT departments and administrators will be able to effectively utilize the solution to drive out inefficiency and reduce system costs.

Unlike manufactured products, software has the advantage of being able to deliver incremental improvements in new releases. Updating PLM software can be a complex process due to technology dependencies or organizational structures. Ensuring that software updates, enhancements, and data migrations are well planned, tested, and implemented are potential sources of strain on the production environment and a potential source of cost overruns. Good, comprehensive support services can mitigate these issues.

At CIMdata we believe that understanding and preventing the sources of customer trouble is a key competency for PLM solution providers who want to support their customers effectively. The most significant capabilities are those services that help customers avoid issues in the first place. Assessment, system monitoring, training, and knowledge sharing tools are key to delivering a robust, complete support solution that allows the customer to quickly and efficiently research and locate their own resolutions without having to engage the solution provider in troubleshooting cases.

The Evolution of Support Services from PTC

PTC made a major investment in transforming its PLM support organization to provide an improved customer experience. To emphasize a broader customer perspective centered on how to help customers maximize the value of their PLM technologies, PTC invested in 3rd-party research and customer feedback to uncover the real value customers seek from their software support services. CIMdata applauds the use of a 3rd-party to validate customer requirements while minimizing bias. A key result of this effort included the formation of a customer council whose primary contribution resulted in the development of a new online support experience.

Support Services Aligned to Customer Goals

In mid-January 2013, PTC announced a new positioning of its support services. The purpose was to emphasize services and enhanced features that are designed to improve the support experience with PTC PLM applications. Table 1 presents customer goals and challenges and how PTC's support services map to those requirements to meet them.

Table 1—Alignment of PLM Goals with Support Services

Your IT/Admin Goals	Challenges to Goals	Meeting Those Challenges	Related PTC Support Services
Maximize Productivity	System Downtime	Adopt the latest software releases to avoid incompatibilities; implement code fixes	> Software Releases: major, maintenance and security updates
	Over reliance on experienced internal personnel	Immediately leverage vendor technical assistance to expedite diagnosis and resolution	> Support Desk: Case Management; ISO-certified process > Self-Guided Support: online; personalized > Premium Services: Technical Account Manager; Onsite; Senior Support Engineers
Optimize System Performance	Upgrade & Migration Delays	Upgrades and Data Migration projects help optimize system performance. Planning well in advance, with the vendor, and leveraging best practices and vendor tools are keys to success.	> Support Desk: Integrated R&D support > Self-Guided Support: online; personalized > Premium Services: Technical Account Manager; Onsite; Senior Support Engineers; Upgrade and Migration Specialists
	Slow / Reduced Performance	Specialized monitoring tools and regular implementation of maintenance releases are proactive solutions to ensure maximum system performance and avoid technology incompatibility that impacts performance.	> Software Releases: major, maintenance and security > Support Desk: System Monitoring Tools
Control Costs	User Downtime	Access vendor resources to plan and test, well ahead of changes to the production environment. Production changes may best take place on a weekend to avoid peak user hours	> Support Desk: Planning and Diagnostics > Software Management: Update Advisor Tool > Premium Services: Planned Weekend Support
	Application Customizations	Move to current releases with more OOTB functionality to reduce internal personnel time spent supporting application	> Software Releases: major
Reduce Risk	Data & IT Vulnerability	You need ongoing updates including maintenance releases and security updates to reduce risks to the business like downtime, data loss, and system performance issues.	> Support Alerts: Technical, personalized alerts; <i>Support Advisor</i> email > Software Releases: maintenance and security updates
	Unsupported IT Environments	You need ongoing updates including maintenance releases and security updates to reduce risks to the business like downtime, data loss, and system performance issues.	> Support Alerts: Technical, personalized alerts; <i>Support Advisor</i> email > Software Releases: maintenance and security updates

New Customer Expectations

A second dimension of the PTC support transformation was responding to customers' changing expectations regarding their interaction with PTC and the manner in which they would like to receive service and support information. To meet these expectations, PTC focused on making the delivery of their support services personalized, proactive, social, and integrated. PTC is focusing on the right areas for improvement, and CIMdata expects to see continuous improvements in their customer satisfaction ratings as a result of this effort.

Personalized

PTC recently launched a new and award winning eSupport Portal. The Association of Support Professionals recently announced that PTC's site is one of the Ten Best Web Support Sites for 2013. The portal is the 24 x 7 gateway to PTC online support. Personalization is a key aspect of the new portal. The content is moveable and the layout can be customized. The re-design helps improve the speed of document search as well as the management of customer specific cases. Other areas supported by the portal include:

- Product-Specific Documentation
- Case Management
- Article Bookmarks
- Recommended Articles
- Recently Viewed Articles
- Technical Announcements
- Portlet Inclusion / Exclusion
- License / Account Management

The support knowledgebase itself has been completely overhauled with authoring, publishing, and editing conducted in a certified process (using the Knowledge Centered Support methodology) that improves quality and availability of services. Document revisions come from the Technical Support team's constant monitoring of their own use of these knowledgebase articles as well as a customer feedback widget built into each article. CIMdata believes that the social aspect of feedback driving revisions to knowledgebase documents will help to keep the content relevant for a longer time period as well as improve its quality.

PTC's ISO-9001:2008 certified support call centers operate using formal processes to manage customer cases and are fully engaged with PTC's R&D organization. The Support Desk is multi-lingual and uses a single, global database to track all product and service-related information. Support cases are managed throughout their lifecycle from initiation through closure, including escalation, if necessary. To best support companies operating globally, each PTC call center has access to the most up to date information about a case no matter where it was initiated.

Proactive

Software Support is still the most valued component of a support agreement; these entitlements provide new releases, feature and security updates, and also maintenance fixes. Tech Tips, a recently enhanced service, consists of live webcasts that provide "coaching" through direct interaction with PTC product experts. Ensuring that users receive training on the latest features is a common problem at customer sites. CIMdata sees the webcasts as an effective way to quickly, and at a low cost, achieve focused knowledge transfer to specific customers.

Avoiding issues is a key aspect of being proactive. PTC provides multiple alerts to ensure that customers are aware of issues before they are impacted. For example, system monitoring tools are integrated into PTC's PLM solutions so customer administrators know about potential performance issues before they affect production.

Social

The new PTC Global Support includes three types of social interactions: (1) a Twitter feed with bite-sized support alerts; (2) a Windchill blog within the PTC Community site; (3) a product enhancement request tool, called "Product Ideas," that allows customers to interact with other customers. Customers can review all of the submissions and vote for the ones they like best. PTC Product Managers monitor and then regularly provide feedback within the site

to identify which ideas may already be in their roadmap and which ones they will consider for the future. CIMdata sees this social interaction as having great potential to help PTC fine tune its product roadmaps and possibly even get breakthrough ideas for product enhancements.

Integrated

Support information is available directly within PTC's software applications. This allows contextually relevant articles from the knowledgebase to be displayed when and where needed. A menu is provided to enable knowledge base searching and issue logging without leaving the software application.

Support Packaged to Fit Customer Requirements

PTC offers three support packages: GOLD, *GOLDplus* and PLATINUM. GOLD is the standard level that includes the core support services available including 24 x 5 access to technical phone support.

GOLDplus is a premium service that includes access to a more senior level technical support team and provides 24 x 7 technical phone support.

PLATINUM is the highest level of premium support designed for large, multisite organizations. It includes access to a dedicated team of the most experienced support engineers and onsite support. Platinum customers also benefit from the services of a Technical Support Account Manager who can guide them and the PTC Technical Support teams through priorities and goals to ensure day-to-day and project success.

Conclusion

In every business market, there are many ways to provide value. Just being a leader in technology, reliability, price, or any single metric is not enough to be a market leader. Customers expect world-class support and service that enable them to get the most value from their software and technology investments not just when the software is acquired but throughout the lifecycle of the application. In addition to supporting their business goals they also expect the services to use modern technology, be easy to use, and always be available.

PTC has made a significant investment in revamping their support offerings to ensure they provide more than just maintenance and defect fixes. They want to deliver the support expected by their customers and help them achieve the most from their investments in PTC and its solutions. The customer portal provides easy 24 x 7 access to available services, and the new and updated support structure and capabilities help customers use PTC's products more effectively to develop better products faster at lower cost.

About CIMdata

CIMdata, an independent worldwide firm, provides strategic management consulting to maximize an enterprise's ability to design and deliver innovative products and services through the application of Product Lifecycle Management (PLM). CIMdata provides world-class knowledge, expertise, and best-practice methods on PLM. CIMdata also offers research, subscription services, publications, and education through international conferences. To learn more about CIMdata's services, visit our website at <http://www.CIMdata.com> or contact CIMdata at: 3909 Research Park Drive, Ann Arbor, MI 48108, USA. Tel: +1 734.668.9922. Fax: +1 734.668.1957; or at Oogststraat 20, 6004 CV Weert, The Netherlands. Tel: +31 (0) 495.533.666.