



BY DAVE BROWN

The “Future State” of Customer Support

Before You Create a Roadmap, You Need to Know Where You’re Going

Few people would argue that the future of customer support is Web-enabled e-support. You might get some good debates going about exactly what that means, but few would argue with the basic concept (see my previous columns in *The Professional Journal* for a definition and discussion of knowledge-enabled e-support models). But, because a concept can mean different things to different people, particularly when we’re talking about new methods, we must clearly define the vision...and we must clearly set expectations.

When companies are looking to improve current support operations using traditional techniques, they often perform some form of operational assessment or audit. I’ve done many myself, and it’s an effective approach to solving problems in the existing operation, improving efficiency, or validating the

need for reengineering. However, when considering a radical change, such as moving away from a labor-based, traditional model (telephone support) and toward a knowledge-enabled e-support model, you’ll need something else. You’ll need a “future state design.”

A future state design (FSD) is your blueprint. No, I take that back. The future state design is the equivalent of the architect’s rendering or designer’s concept. It’s the thing that gets everyone on the same page; the thing that makes it clear what “this” (your idea) will look like when it’s done. It’s the thing that is necessary *before* the blueprint can be developed.

So how do you go about developing a future state design? And what does one look like when it’s done? First, let’s define the future state design as it applies to transitioning to a knowledge-enabled e-support model.

Definition

The FSD is a description of what the support organization wants to be at some future date and how knowledge management and e-support programs will enable that new model. It describes what the operation will look like when we complete the transformation. The FSD should include descriptions of how end users will interact with the company’s products, how channels will be supported, how services will be delivered, new revenue streams that will emerge, changes in the company’s competitive positioning, and required changes to performance metrics.

The FSD also should describe what will be required from each functional entity (executives, sales, engineering, marketing, support, HR, etc.) in order to achieve the desired future state, including changes or additions to specific job roles and skills. These descriptions

must be focused on changes brought on by the new knowledge-enabled e-support model.

The FSD should describe how each participant in the service process (customers, employees, and partners) will function in the new model. The FSD must describe the changed business processes and how specific knowledge tools and practices play a role in those changed processes. While some details will be worked out during ensuing steps (this is too early to define every detail), at this point we should be able to “frame” the model; describe the basic workflow for calls, e-mails, and Web-generated incidents; describe the service agents’ call-inquiry handling process; estimate the call-process handling times; predict the level of staffing required; and estimate the service levels to be achieved. With that information, we should be able to estimate the new operating costs (develop a pro forma operating budget).

Approach

Now that we know what an FSD is, let’s talk about how to develop one. The creation of the FSD usually involves an outside consultant or facilitator—this is not essential, but it’s the most common approach. However, as opposed to the task of performing an operational assessment, where the outsider is independently evaluating the current operation, this is a collaborative process. The consultant must have significant knowledge and experience to be effective, but the role truly is to facilitate and translate. The job of the

consultant is to gather existing plans, ferret out undocumented visions and goals, compile, and clarify. The facilitator must reconcile potentially diverse views and conflicting goals from executive management, various functional areas, customers, and partners. Each must be considered so that the final design meets the needs of the company and those it serves.

The process of developing a future state design starts with an understanding of the company, its products, and its customers (both current and future). The company must realistically consider market conditions, competition, and other factors to predict the next generation of products...and users. An effective facilitator will be able to glean these views from interviews with the key executives. Often, additional market research is performed to substantiate the view of the future. The facilitator-consultant also may become a catalyst, generating new ideas by providing examples and proposing solutions. Developing the FSD essentially is collecting your various goals, concepts, desires, and visions and then transforming those concepts into a clear and concise picture. The consultant then will apply industry best practices, enhance this information with knowledge of what is or will be possible, and turn the collection of loose concepts into a concrete description of how things will be.

Conclusion

From a practical standpoint, a future state design should be accom-

panied by several additional items. The key components are a gap analysis (the difference between where you are today and where you want to be) and a roadmap to get you there. To create the gap analysis, there must be a relatively clear definition of the current state. This often comes in the form of an operational assessment, as mentioned previously. From the gap analysis, we can develop a roadmap or preliminary project plan and recommendations on how to phase the implementation of the prescribed strategy. The plans should address changes to technology, workflow, knowledge creation, and knowledge maintenance. With these pieces defined—future state design, roadmap, and pro forma operating budget—it’s relatively straightforward to develop the return-on-investment (ROI) analysis.

A comprehensive future state design, along with a thorough ROI estimate, is the best way to gain executive approval. The next step (to be discussed in my next column in the July issue of *The Professional Journal*) is the development of the comprehensive blueprint. ▼

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