



Leveraging Web 2.0 to Improve Collaboration With and Among Customers

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November's Topic of the Month for SSPA Research is Web Collaboration. When asked last month which title you would most like to see addressed in this month's SSPA News, the winner with 50% of the vote was "Web 2.0: Collaboration With and Among Customers."

Web Collaboration Isn't Just About Chat

When you ask companies how they use Web collaboration in support, their first reaction is usually, "Oh, we don't offer Web chat." Yes, Web chat is a popular piece of Web collaboration suites from eService vendors such as **KANA**, **RightNow** and **Talisma**, but Web collaboration is not limited to customer/agent chat sessions. To other companies, Web collaboration means Web meetings, a la **Citrix Online** and **WebEx**—allowing people all over the world to participate in meetings and share documents without leaving their offices.

But when surveyed, clearly the business problem most of you are hoping to solve with Web collaboration technology is finding new and better ways to communicate with your customers, and to help build a sense of community by enabling customers to interact easily, sharing best practices and maybe even war stories about your technology.

I have written previously about Web communities (see reference list at the end of this article), but here's a basic primer if the Web 2.0 world is new to you. Online communities, or social networking, are best known for pure consumer sites such as MySpace, LinkedIn and Facebook, but online communities are becoming common for customer service and technical support, and software companies such as **Lithium** provide community platforms targeting usage in support. If the answer to a customer question isn't found in a Web self-service knowledgebase, customers have the option to post a question in a forum, and other customers can share their insights. Company moderators step in to answer questions not successfully resolved by peers. Online community features include:

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- **Forums.** Discussion forums allow customers to post questions, as well as comments on questions from other customers. As a best practice, forum content should be indexed with the knowledgebase search engine so if a customer is searching for an answer not addressed in the knowledgebase, they are provided with links to any relevant forum discussions.
- **Reputation model.** As customers become more active in forums, they move through various stages in a reputation model based on number of postings and customer ratings of their postings. Reputation levels are named differently in each forum, but typical names are along the lines of Novice, Junior, Professional, Veteran, Wizard or Guru. The more a customer participates, the higher the reputation level they receive.
- **Wikis.** The best known Wiki is Wikipedia, an online encyclopedia to which anyone can contribute. Wikis increasingly have a place in customer support communities, particularly now that software companies such as SocialText are providing support-oriented Wikis, which allow customers to propose best practices and continually edit and refine the best practices.

It's All about the Process

Companies that buy CRM software hoping it will provide the processes necessary to manage customer relationships usually learn an ugly truth: technology can enable and streamline processes, but it isn't great at creating processes in the first place. In fact, during my time implementing customer service and knowledgebase software, I saw two underlying reasons for most implementation failures:

1. Using the technology to automate broken processes
2. Using the technology to create process where none exists

Enabling Web collaboration with and among customers is no different. If you do not currently have a well designed process to solicit and track customer feedback, and input on products and service offerings, launching an online community and expecting customers to magically participate will fail. Similarly, if you have yet to define a way for customers to contact each other, sharing information and best practices, the fact that you launch an option to do this online will be unlikely to find high customer adoption.

The key, then, is to take your existing processes for customer collaboration and migrate the processes to the Web, incorporating community capabilities such as forums and Wikis to replace existing email distribution lists, conference calls, maybe even some local user group meetings. Once this online beachhead is established, you can begin to expand the community to incorporate additional processes and additional customers. When other customers see lively discussions going on around topics they are interested in, they will be much more likely to join in and participate.

Which Customer Collaboration Processes should be Migrated Online?

When it comes to online communities, SSPA Member companies are curious where to start. While every company, and every industry, approaches processes differently, in this section I offer a few ideas on existing processes you likely already have that easily lend themselves to online execution.

- **Beta tests.** The beta test process is a great candidate to be moved online. Logons to secure forums and software download sites can be given to participants. Most beta programs require customer feedback at certain steps of installation and go live of the beta hardware or software, and this can equate to customers making postings in a shared Wiki, as well as allowing them to post questions to the support or development team when problems arise. Some threads can be migrated to a forum for all customers when the product hits general availability, to jump start dialog and aid in upgrades.
- **Bug/Enhancement requests.** There are excellent examples in the consumer world for this, such as the [AT&T Wireless Forums](#), which offer discussions on technical problems and product suggestions by handset manufacturer. Another example is the highly active (but hard to locate) [Tivo Help Forums](#), which include a board in which features are discussed and enhancements are suggested. Collecting input on enhancements and bugs using an online community helps collect data points on the impact of each issue, and also allows you to easily communicate to all concerned when an item is scheduled for an upcoming release, or when you need to gather additional information.
- **Customer focus groups.** Companies offer various kinds of customer focus groups: advisory boards, committees on certain functional areas, vertical focused groups, etc. Each of these groups has an inherent process: topics are introduced and customers provide input on each topic. This process is ideal for online collaboration, with forums providing a dialog between a subset of customers and marketing or product management, and Wikis to serve as the learnings or opinions of the group to share with the broader customer community.
- **Regional user groups.** Online communities cannot replace the intimacy and immediacy of in-person user groups and conferences. However, finding time to get out of the office to attend meetings with local or regional customer user groups is difficult for customers, and providing onsite resources from support, product management, development, sales and marketing is an expensive proposal for most technology companies. Moving regional meetings to an online forum can help remedy this, with customers posting questions for the company and for each other, allowing customers to collaborate and share ideas/best practices, with the company weighing in on product related issues. Again, migrating identified best practices to a Wiki is a good way to share

the regional customer findings with the larger customer population.

For more information on leverage Web communities for support, see the following SSPA Research:

- **Leveraging Web 2.0 for Margin Improvements.** This piece discusses the risks and benefits of customer support forums, as well as pointing to SSPA partners specializing in community software.
- **Spring 2007 SSPA Recognized Innovators.** This round of awards included a category for Web 2.0, with details on two SSPA partners doing exceptional work in this area.
- **Top Knowledge Management Trends.** This article addressed the hottest topics from the Spring 2007 SSPA Best Practices Conference, including this one: In a Web 2.0 world, with experts and knowledge articles on your products existing outside of your sphere of influence, how can you leverage external content without losing control over quality?

In addition, here are some posts from my blog, **Ragsdale's Eye on Service**, addressing Web 2.0 and online support communities: **Supporting Customers using Online Communities**, **Proactively monitoring the blogosphere: What are customers saying about your products?**, **KM 2.0: Knowledge Retrieval Beyond the Firewall**, **Wetpaint Wikis: The Consumer is In Control**.

About John Ragsdale.....

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