



## Can Technical Support and Professional Services Get Along?

By Phil Verghis, President, The Verghis Group

Technical Support and Professional Services teams are often siloed both in terms of processes and organizational structure. To take one specific example, Professional Services often feels that even after they take the time to send Technical Support detailed notes about the customer's environment with specific instructions on how to handle them if they have an issue, it never seems to be used. From their perspective, it is just a matter of time before the inevitable call from the customer comes stating that the Technical Support team does not understand their specific configuration.

Since Professional Services often works with a specific set of customers, from their perspective exceptions should be relatively easy to handle. Their stock in trade is dealing with unique and custom configurations.

From the perspective of Technical Support, an e-mail or documentation from Professional Services no matter how well crafted is not a good enough handoff of the specifics. This is because this information is often not integrated into the Customer Relationship Management system. This means that it is just a matter of time before the 'special procedures' for specific customers breaks down into an unmanageable mess.

Since Technical Support often works with the entire spectrum of customers, exceptions are relatively few and far between, and each exception is often just a disaster waiting to happen.

To top it off, often the reporting structures for Professional Services and Technical Support are often different. Professional Services usually reports into Sales. Technical Support often reports into Operations or Engineering, and once in a while into Sales. Each parent organization has a different mentality and a business culture that comes with it. Professional Services will often do 'whatever it takes' and come up with creative non-standard solutions, while Technical Support typically prefers solutions that scale.

### Is there a solution?

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Given this background, is there any hope for the Professional Services and Technical Support teams to work closer together?

While working at a large 'software as a service' provider, we were able to come up with a way for the Professional Services and Technical Support teams to work hand in hand that benefited both – and the customer. At that organization, Technical Support comprised of highly skilled people providing complex support in a 24 x 7, follow-the-sun support environment. Professional Services was locally managed by sales teams around the world. This meant that while they were regionally optimized and highly responsive to local needs, they could not sustain requests 24x7 coverage without breaking their staffing model.

As more global enterprises were added to the customer base, they demanded a different level of support, including 24x7 support, while they were implementing Professional Services solutions. They were not willing to deal with a Technical Support team (no matter how good and technical) that did not have a deep knowledge of *their* specific configuration. The only team that had it was the Professional Services team that did the implementation. They were not able to be on the phone for all night conference calls while the implementations were being rolled out.

Enter Technical Support. The solution was to train a small subset of senior Technical Support team members around the world on how to handle the most common (not necessarily the simplest) types of implementations. They worked hand in hand with Professional Services as the solution was being designed and became intimately familiar with the customer's environment and their specific requirements. This Technical Support sub-team passed all Professional Services certifications, and was seen by the customer and as importantly by Professional Services as being an extension of Professional Services.

Once the critical period was over, the sub-team would train the rest of Technical Support on the specifics, and it was better integrated into the Technical Support team's processes and CRM system.

There were a number of advantages to this model.

- From the customer's perspective, they felt relieved that Technical Support was getting involved early in the support process, which gave them comfort that Technical Support was capable and knowledgeable on *their* environment.
- Professional Services liked it because they could stay on call, instead of on being on long conference calls that sometimes went through the night.
- Technical Support liked it because it gave the senior team a chance to enhance their skill sets and better understand what a customer was trying to achieve rather than just deal with incoming issues.

- From a career path of view, this allowed two-way mobility between Professional Services and Technical Support.

While all this sounds good, we had to do some extra communication to ensure that people understood the big picture. The first set of issues revolved around making sure that Technical Support did not feel it was just 'grunt work' that was being sent over by Professional Services, but it was complex work that was important to the customer. The second was the concern from Professional Services that Technical Support was slowly going to take over their jobs.

### **About Phil Verghis.....**

*Phil Verghis is one of the world's preeminent experts on global service delivery. He is the president and founder of The Verghis Group, a consulting firm that works with motivated clients to optimize global service delivery so that they get and keep profitable customers for life.*

*Prior to founding the Verghis Group, Phil was the vice president of infrastructure and support at Akamai Technologies. He is the only two-time winner of the "Service 25" award given to people who made a significant impact in the field of service and support. He is the author of critically acclaimed The Ultimate Customer Support Executive.*

*Phil will conducting a breakout session on this topic, titled "A Successful Tale of a Partnership Between PS, IT, Engineering, Sales & Tech Support" at the SSPA Services Leadership Conference taking place November 12 – 14 in Washington D.C.*

### **In this session, you will learn how to:**

- *Apply different constraints that allow you to come up with innovative ideas*
- *Partner effectively with engineering, IT, sales and professional services*
- *Provide career paths that make sense between technical support and professional services*

*Also, don't miss Phil's information-rich training day taking place at the conference Sunday Nov 12. In this workshop, you will learn how to maximize the business value of customer support and how to position yourself and your organization for success. Space is limited.*

**Click here** or call the SSPA at 858-674-5491 for more information.

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