

# Customer Spotlight

## JD Edwards' Commitment to Customer Service

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### The Company

J.D. Edwards provides a comprehensive family of modular, integrated, Web-enabled applications designed to assist large and medium-size companies improve business performance. Headquartered in Denver, Colorado and founded in 1977, the company has grown to provide software solutions to approximately 6,500 mid-market customers with sites in over 100 countries, and software in 21 languages.

J.D. Edwards's enterprise software, consulting, education, and support enables customers to get the maximum return on their technology investments. Software solutions enable customers to integrate all aspects of their businesses — from customer relationship management (CRM) to enterprise asset management (EAM), enterprise resource planning (ERP), supply chain management, and supplier relationship management (SRM). Certified consultants help the customer adapt J.D. Edwards's solutions to meet the customer's unique business needs. Education experts deliver personalized training programs, and worldwide support teams offer a range of options from Web self-service to dedicated account management.


### The Challenge

The Global Support Services (GSS) division provides worldwide customer support with highly skilled consultants that thoroughly understand GSS software products. GSS managers decided to brainstorm on how they could improve customer service. "We had good technical skills and experience and were providing good support, but we knew we could do better," said Irit Bean, GSS Training Strategist. Consultants were receiving extensive training on the products before being allowed to speak with customers but they needed training on how to conduct a successful service call to ensure the customer was fully satisfied with the support they received.

The GSS team decided to address the desired improvements by developing 10-minute discussion presentations around key customer service topics and engaged the support team leaders to deliver them to their teams. The discussion topics included such items as managing backlogs, disengaging a call, handling difficult customers and call escalation. After receiving feedback, half-day internal training classes were developed to consistently deliver the training to all GSS support teams. "We had developed some good training materials but we



17075 Via Del Campo, Suite 200  
San Diego, CA 92127  
Tel: 800.552.3058 or 858.674.4864  
Fax: 858.674.1192  
info@servicestrategies.com  
www.servicestrategies.com



were not industry experts and knew we would need some help to make this a truly successful program,” added Irit Bean.

Jon Mattei, Vice President of GSS, recognized that if J.D. Edwards could deliver world-class technical support, it could be a competitive advantage in the marketplace. “Our primary objective is to meet the needs of our customers with timely, accurate and professional support. In order to meet this objective, we needed superior technical and professional support skills. We needed to develop the technical skills we have and leverage the substantial investment in each of these valuable resources – so we elected to contract with an outside organization which specializes in customer service skills and is familiar with the complex nature of the software systems we support”, stated Jon Mattei.

## **The Solution**

J.D. Edwards began their search for a vendor to develop and deliver the customer service skills training that could have the intended marketplace impact. A list of needs was developed that included communication skill such as listening, questioning, managing conflict, and online communications. In addition, the list included items on how to handle a call from start to finish, the definition of exceptional customer service and how to deal with challenging customers.

It was not easy to find a qualified vendor to develop and deliver the needed training. “Most of the training available was not for highly skilled software specialists. We had a difficult time finding vendors that understood our business and also were experts in support service training,” said Irit Bean. The selected vendor needed to have the required content, a solid training methodology, be price competitive, flexible, match J.D. Edwards culture, be international in scope, have experienced trainers, offer a certification program and be able to train J.D. Edwards trainers. This was a tall order.

The company narrowed the potential vendor list to 3 companies and had each vendor present a half-day pilot training class. The vendors were thoroughly evaluated by a committee of 10 GSS employees ranging from managers to frontline consultants. Service Strategies Corporation was selected. “Service Strategies was chosen because they are technical trainers, had high quality instructors, met all our objectives, their content was geared to adult learning and they had a certification program,” said Donna Scharfenberg, GSS Training Specialist. The Service Strategies program is specifically designed for external support centers that deal with complex software issues.

GSS chose 20 people for a 2-day pilot class presented by Service Strategies and using examples and scenarios specific to J.D. Edwards. The feedback on the class was very positive and GSS decided to roll out the training to the entire division. The 2-day customer service training was conducted over a 3-month period in Denver, Colorado for their 300 consultants.

The next step was for Service Strategies to train 10 GSS trainers. A full one-week training class was developed and delivered by SSC. The newly certified GSS trainers then trained 100 consultants in London, as well as consultants in Melbourne, Tokyo and Singapore. Training was provided in both English and Japanese.



## The Results

The training program has been highly successful. “We received many positive comments about the class via Email from students after they attended the class. We also had each student complete an evaluation immediately after the class and we summarized the results. The bottom line was that we had made the right decision and this was the right vendor,” said Irit Bean. GSS now includes the 2-day training class for all new employees as part of their new hire orientation program.

Because the skills learned were so critical to successful customer service, GSS developed quarterly themes that reinforced the training. The teams did role-plays and taped the sessions and made the learning fun, while ensuring the consultants were continuing to use the new skills.

At this time another key decision was made. GSS saw that the training had been successful and wanted to demonstrate in a tangible way that all support teams had reached a consistent high level of customer service skill. The best way to do this was to conduct certification exams. “J.D. Edwards defines a knowledgeable, committed workforce as one of its six strategic imperatives. GSS has made significant investments in training and we have seen tangible improvements in our service delivery – certifying all our consultants will allow us to keep the momentum going”, added Jon Mattei.

GSS developed a pilot refresher course with a comprehensive review guide and gave it to 10 people. An open book practice test was given at the end of the half-day course. The 10 people then took the SSPA online Certified Support Professional (CSP) exam and all passed with high marks. “We didn’t want to spend the money to have consultants take the certification exam until we were sure we had a good method for preparing them for the test. The refresher course and guide proved to be a very successful tool to help ensure consultants could pass the online CSP exam,” said Donna Scharfenberg. The decision has now been made to get all 400 GSS consultants certified.

Now that a plan is in place for all consultants to be trained and certified, the focus is turning to the management team. Service Strategies also provides a Certified Support Manager (CSM) training course. The 32-hour course is uniquely created to provide training on the standard fundamentals of management, relative to the support environment, and to enhance the inherent skills and knowledge of the support manager. This course focuses specifically on the most common management elements required to manage a dynamic support center. The course requires a half-day test to receive the certification.

GSS managers typically have 3 years experience as a manager and have been with J.D. Edwards for 9 years. They all attended the customer service training but felt they needed management training more specific to a support center. GSS decided to put several of their managers through the CSM class to test its value. “Leadership, resources, knowledge, customer satisfaction, performance and financial matters are the concern of everyone in a good support center,” said David Tinucci, GSS Support Center Manager and member of the initial CSM course, “but this class teaches managers how



to deal with these support topics in a process oriented and methodical way. The course leaves you with several tools that make managing these support center topics easier and less time consuming.” Based upon the success of this first management certification experience, GSS plans to have all 40 of its managers certified.

The training and certification programs have had such a profound impact on GSS that they have decided to have all their business partners throughout Europe and Asia/Pacific certify their support team members. In the future, a company’s staff will need to achieve the Certified Support Professional designation before they can become a J.D. Edwards certified business partner. This will ensure consistently high quality support for the entire J.D. Edwards customer base.

A final step in the process is having all the J.D. Edwards support centers certified as meeting the standards of the Support Center Practices Certification program. The Support Center Practices (SCP) Certification quantifies the effectiveness of customer support based upon a stringent set of performance standards and represents best practices in the industry. The SCP program is guided by a body of sponsoring companies who represent core members of the Service & Support Professionals Association (SSPA), and is managed by Service Strategies Corporation. The sponsor companies contributed their insight and perspective into defining key elements required for delivering World-Class support. The criteria sections defined within the SCP Certification program represent the broad scope of business practices necessary to deliver top quality support. Companies that execute well in all of these areas will ensure that they have the appropriate business processes in place to drive efficient support operations and high levels of customer satisfaction.

J.D. Edwards is now receiving higher customer satisfaction scores from its customer support activities. Turnover of consultants has been reduced because they are more fully trained. “The support is pretty much what I expected, but let me emphasize that I hold them to a very high standard. J.D. Edwards is supposed to be the Cadillac of systems, and that’s what I look for from them”, says Robert Lieberman, CTO, New Plan Excel Realty Trust Inc.

“Overall, this program has been successful for us and our customers because customer service is a key differentiator. With our consultants, sites and partners all on the path to certification, we can focus on delivering excellent customer support”, added Jon Mattei.