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# Customer Service Manual for A N Other Ltd

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## 1 Introduction


### 1.1 This Document

This document is designed to offer you an introduction to Metaphorix and the way we support you.

### 1.2 Contact Details

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### 1.3 Contents

This document describes each of the services provided by Metaphorix from sales through to support, from adding bespoke programs to getting more training, from resolving your issues to keeping you informed – we want to make sure that you get the best possible service.

The main areas of the service offered by Metaphorix that are covered in this document include the following.

- The role of the Customer Service Consultant
- The Project Closure Report
- Keeping You Informed
- Support Contracts
- The Customer Support Process
- Customer Events
- Case Studies and References
- Customer Feedback

Each of these is covered in more detail in the sections that follow.

## 2 The Role of the Customer Service Consultant

### 2.1 Introducing Our Customer Service Consultant (CSC)

In order to make sure our customers get the service they need we use a Dynamics NAV consultant as a roving ambassador to meet with you and ensure your satisfaction with us and the solution, face-to-face.

Our CSC is extremely knowledgeable about the functions in much of Dynamics NAV and is familiar with implementing the product for other users like you. Because the CSC is an operational person, not marketing or sales, you can count on getting support and advice for your installation of Dynamics NAV free-of-charge.

The Customer Service Representative (CSR) is a very importantly role for us. Adopting a softly, softly approach to selling to customers once they are installed means we run the risk of losing touch with you and this is something neither we nor our customers want to happen.

So, to make sure that we keep up to date with you and your use of the system we ask you to accept a twice yearly visit, at your convenience, from our CSR.

#### 2.1.1 The Role of the CSR

Our CSR has a very specific remit.

The number one priority for the CSR is to ensure that customers are happy with both the system in use and the support they get from Metaphorix whilst using it.

To make sure that you are happy with the system, we need our CSRs to be able to understand the operational issues you might have with Dynamics NAV. That's why our CSRs are recruited from our operational staff, bringing to the role an excellent knowledge of the functionality within NAV and the process of installing and using it in a live company.

This means that the CSR is not a sales or marketing person and, in fact, we insists that our CSRs do not attempt to sell anything to customers. Their mission is to inform and help.

Using their knowledge of the system they can advise you on any issues you might have, the best way to tackle new processes using NAV and even to fix little niggling issues that you may have in the set up or use of the system.

#### The CSC will...

- Visit you to understand your issues
- Visit you to help you solve problems with the system.
- Follow up queries or outstanding help desk logged calls.
- Get a sales person to contact you if you need to buy something or want more information on products and services that you are thinking of taking.
- Encourage you to come to customer events that we believe will prove informative and helpful.

- Keep you up to date with the latest news from Metaphorix, Microsoft and the general business software world that we feel you need to know.
- Ask you to complete the Microsoft Customer satisfaction survey as part of our commitment to Microsoft to ensure customers get a chance to voice their opinions of us and our support services.
- Ask you to help us by creating a written case study, but only if you want to!

**The CSC will not...**

- Try to sell you anything.
- Send you marketing materials...

...unless you ask for them or unless Microsoft or other third party product suppliers have asked us to pass them on to you, and then only in an 'informative' way.

- Insist on seeing you even if you don't want to see her.

We believe that the CSR adds a lot of value and we encourage you to accept their visits to make sure you get the best possible support for your system.

### 2.1.2 The CSR Visit

The CSR visit offers a number of benefits.

The description above of the role of the CSR highlights one benefit – the use of their knowledge to help your system to run more effectively for your users.

However, the visits offer more value because they cover a number of other areas.

- The CSR will bring to each of the bi-annual meetings a report on your use of the help desk, any outstanding queries you might have and discuss how well you feel we are supporting you via the Help Desk. If there are any areas where you feel we can step up our game, the CSR will report those back to us for action.
- The CSR will update you on the latest news from Metaphorix and Microsoft, ensuring that you know what is happening so you can take action or make plans if things are changing that affect your situation.
- The CSR will take back any issues from the visit that you feel we need to advise you on. This might be an area of the system that needs expansion, something that's happening in your business that you want the system to cover, issues with charging where you want us to take a look at the pricing or billing of fees or simply a need to add users or tables or forms. The CSR will decide on the best person to handle each of the issues for you and make sure that you get the response you require.

Based on this, we would strongly advise that you take up the CSR visit and make the most of the services they offer.

## 2.2 CSC Visits

The CSC is available to visit you on a frequency you dictate. This can be more or less often, to suit your needs. The timings available are:

- Quarterly
- Twice a year
- Once a year
- On request

The frequency will be set with you as part of the project closure process when you first get to meet your CSC.

The agenda for any CSC visit will include the following:

### **Introduction to the role of Customer Services Consultant (only done on first visit)**

- My background & why I was employed
- Impartial link between Operations & Sales
- Help and assistance with any issues with Meta (e.g. support escalation)
- Help Meta to improve its service to customers by providing regular contact, support and opportunities to improve the user experience.

### **Provide Customer Engagement Document**

- Review Document with customer

### **Concern for customer & their use of the product set**

- Review customer support log report
- Outstanding calls and their status (customer or Meta focus)
- Outstanding project related issues
- Customer satisfaction with support desk and content & frequency of call log reports received
- QlikView Support Report
- Training requirements
- Establish frequency of CSC visits or calls.

**New information about Metaphorix and Microsoft**

- Metaphorically Speaking
- Product seminars (e.g. SQL, QlikView)
- Customer days

**Post Go-Live Support**

- Review Project Completion Document
- Agree date for sign-off and completion of Issues List.

**Gather Customer Information & Feedback**

- Gold Partner Status
- Case Study opportunity
- Microsoft References
- Check CS contact names, roles, phone and email are correct in CRM
- CSAT – 5 monthly

## 3 The Project Closure Report

### 3.1 Introduction

As part of our Sure Step implementation methodology, there is a last action in the project proper that marks the bridge between the live implementation and the hand-over to our support team for the on-going management of your installation.

This process is the completion of the Project Closure Report.

This is usually started at the Project Closure Meeting that we hold where the Metaphorix Project Manager, our CSC and your chosen representatives review the project and sign it off as complete so that it can be picked up by our support team for all future queries.

Once the notes are taken at this meeting, the CSC will take them away and draft up the report with any comments, ideas, recommendations for changes to our processes, any areas of future interest or actions to complete for additional phases in the project.

The draft document will then be provided to you for checking, amendment and then final sign-off.

The purpose of the document is to record the formal end of the implementation of this phase of the project.

The acceptance of this completion report will signal the move by the customer to the Metaphorix Help desk for support and the end of direct engagement with the project staff from Metaphorix that were involved in the implementation to date.

Following this process, the support of your account will pass to the following people/groups within Metaphorix:

- Sales                                      Your nominated account manager
- Customer Service                      Your CSC
- Support                                     The Metaphorix support Team

### 3.2 Content

The content of the document covers the following aspects of the completion sign-off process.

- Review of the Project

This section examines the way the project was rolled out, the deliverables that were specified for the project and the issues that were accounted during the process.

- Customer Satisfaction

This section asks for a view of the customer's satisfaction with the process and the overall result of the implementation. It also covers the objectives set for the project at the outset and how well the process met those objectives. This section asks that the customer describes areas where they feel it would be helpful to review the process and to make improvements.

- Formal Acceptance

This section asks the customer to accept each of the deliverables in the project as being complete and, if outstanding work is required in order that this acceptance can be forthcoming, that these are listed so that action can be taken to complete them as quickly as possible. These follow-on actions should also be specified in this report with a date set to review them to allow final acceptance to take place.

- Hand over to Customer Services

This section covers the hand over to the post implementation organisation within Metaphorix, including the help desk for support, nomination of the sales person that will handle any account issues in the future and the introduction of the Metaphorix Customer Service Representative (CSR) and the support services this role offers to customers.

- Project Sign-off

This is simply the sign-off section where each of the sections shown earlier in the document are summarised and signed-off by both the customer and Metaphorix.

## 4 Keeping You Informed

One of the main services we can provide to customers, post-implementation, is to keep you as well informed as possible.

There are two main ways we do this.

### 4.1 The Metaphorically Speaking Newsletter

Metaphorically Speaking is our single issue newsletter that we use to keep you informed about everything relevant to your use of the Dynamics NAV solution.

This is used as way of updating you on things that we feel you need to know – typical content includes:

#### Microsoft Issues

- Microsoft product news and announcements
- Microsoft offers and incentives
- Microsoft events
- Microsoft terms and conditions changes

#### Metaphorix Issues

- Metaphorix organisational or service changes
- Metaphorix support issues, including key dates when not available
- Metaphorix product news, including 3rd party add-ons to Dynamics NAV
- Metaphorix offers and incentives
- Metaphorix events

The format of Metaphorically Speaking is simple. It is designed to give easy access to the items you really want to see. Rather than bombarding you with lots of documents that you would just find annoying, we let you judge if any edition of Metaphorically Speaking is relevant to you first.

Each edition is sent out as a simple email describing the content and context of the Metaphorically Speaking in question.

There is a link on that email that allows you to choose if you download the actual PDF document that contains all the details of the edition.

If you do not currently get these updates, or there are people inside your organisation that you feel should be receiving it but don't at present, please email us at:

[lizvh@metaphorix.co.uk](mailto:lizvh@metaphorix.co.uk)

We will add the names to the distribution list.

## 4.2 Metaphorix Blog

Issues of particular interest to our customers are published on our Blog, including copies of all our Metaphorically Speaking Newsletters. To access the Blog, simply go to:

<http://metaphorix.wordpress.com/>

## 4.3 LinkedIn

Over 135 million professionals use LinkedIn to exchange information, ideas and opportunities – keep up with Metaphorix on our LinkedIn profile at:

[http://www.linkedin.com/company/metaphorix-ltd?goback=.cps\\_1285841395504\\_1](http://www.linkedin.com/company/metaphorix-ltd?goback=.cps_1285841395504_1)

## 4.4 Facebook

The premier social networking site offers us a channel to keep you up to date with what's happening at Metaphorix – to friend us got to:

<http://www.facebook.com/?sk=2361831622#!/group.php?gid=150947511610910>

## 4.5 Twitter

There is no better way to get an instant update from Metaphorix than by using Twitter. To get a constant feed of informative and useful tweets from us, simply go to:

[http://twitter.com/meta\\_tweets](http://twitter.com/meta_tweets)

## 4.6 Microsoft Customer Source

As part of the support service offered by Microsoft there is a customer site that offers on-line training, help and advice called 'Customer Source'.

As part of the role of CSR, you can ask us to set you up on Customer source so that you have a log-in and are able to get the latest information direct from Microsoft via the site:

<http://www.microsoft.com/en-us/dynamics/customersource.aspx>

## 4.7 The Customer Support Log Graphical Report

A graphical report is available to customers to help them track their usage and issues posted with the Help Desk. Using our business intelligence reporting software, QlikView, this Support Call report is available to you monthly via email.

For those of you who are not familiar with QlikView, the data will be shown in a colourful graphical dashboard format and will provide a snapshot of your support data.

The report shows the number of calls and emails your organisation has logged via our support desk in the previous month. It also breaks the analysis down to show the actual people who logged the calls and which category the calls fell into. There is also a graph showing a comparison analysis of calls this year and last.

## 5 Support Contracts

Every installation has a number of components that require support if something goes wrong – the server hardware, the PCs, telecoms and, of course, the application software that supports all your business processes.

This is an introduction to the Metaphorix Customer Support service and the contracts available to you to make sure you have the cover you need when you need it. It also describes the process that we employ to ensure that any problems get fixed as quickly as possible.

### 5.1 Introduction

When you need support, you want to be helped right away and you want to be helped by an expert.

That's how we handle your support issues and our contracts reflect this approach. The areas where support is needed include:

- Server hardware and operating software.
- Peripherals and the software they run.
- The line of business software you use.

The third of these is, arguably, the most crucial. If you get a major problem with your application software, your business could grind to a halt.

This is where our main expertise lies, but we know that you want a one-stop-shop for all your issues, and that's what we offer.

### 5.2 The Process

If you experience any problems at all with your system installation, we want to know. As the support arm for your main business software solution, our job is to keep your system running.

So if you get any kind of problem, you should tell us about it so we can help diagnose the best way to get it fixed.

- If the problem is application software related, then we will we apply our normal approach to fixing problems, as described in the sister document to this one – 'Customer Support'.
- If the problem is related to hardware or operating system issues then we will help guide you to the right person. This might be one of our own hardware technical specialists or it could be the third party provider who installed your hardware.

No matter who is tasked with fixing your problem, we will make sure that it doesn't fall into the gap between us and any other organisation helping to resolve that issue.

Metaphorix does not directly offer hardware support, so our role in fixing any problem of this type will be advisory. Our skill set is centred on keeping your business software running properly.

So, the most important support that we can offer you is the software support service we make available to all users.

### 5.3 Software Support Contracts

There are two types of application software support agreement available to users, each charged annually in advance for a 12-month period.

- Standard Software Support
- Bespoke Software Support

#### Standard Software Support

This is the type of support contract that covers you for all the standard Microsoft Dynamics NAV or third party supplied products that we offer.

The cost of the contract is calculated at 21% of the list price of the software being provided (based on taking out a three-year support contract with Microsoft).

The cover offered includes:

- New releases of software FOC when issued by Microsoft or others (14%).
- Help Desk support by Metaphorix as part of our Customer Support function (7%).

Taking out cover on an annual, rather than three-year, contract basis changes the Microsoft element of the maintenance to 16% and the Help Desk fee to 8%, making a total of 24% per annum.

Both types of cover are important to your installation and deliver real benefit to you and your users.

The benefits offered by the standard support contract are described in the sections that follow.

#### Exciting New Function

Microsoft is constantly finding new ways to do things, new approaches to solving old problems.

The Microsoft resources dedicated to making the software easier and more exciting to use are significant.

- Microsoft invests more in R&D than any other technology company – over \$2.5B a year.
- Microsoft tops the European Commission Global R&D Investment League Table.
- Microsoft employs 800 ‘thinkers’ to come up with new ideas for the software.
- Microsoft sustains six software development labs spread across the globe.

All this power is committed to delivering you the best business software available.

### **Key Business Functions**

We live in a very fast-moving business environment. Processes and practices change constantly, companies find new ways to trade with one another, to pay one another and to keep each other informed.

You only have to look at the massive move to the use of the internet in the last few years to know that things simply won't stand still. When your customers and suppliers move to handle things differently, to alter the relationship you have with them, the system has to reflect those changes.

This is one of the vital benefits of upgrading – to get software that will handle all the latest business practices.

### **Protecting Your Investment**

Having made a major investment in your software solution, it would be a terrible waste of your time and money to let it lapse over time and become out of date.

Not only would this hurt your businesses ability to operate in its chosen markets, but would also mean that the whole system would have to eventually be replaced if you are to remain competitive.

It makes hard commercial sense to make sure you pay for the updates that Microsoft offer on a regular basis.

Dynamics NAV, previously known as Navision, started life in 1993 and has gone through 6 major upgrades to reach today's version. As a user with a standard software support contract, all this software function is made available to you without additional payment.

The only cost you incur is for the time we spend uplifting your solution and educating users.

This is more cost effective than letting the system get out of date, forcing you eventually to look for a replacement system with the associated cost, risk and disruption involved.

### **New Legal Requirements**

Some enhancements made to the software may be nice to have, but some are essential to have. None more so than those that need to be made to adhere to changes in legal and fiscal operations announced by governments in the UK or EU.

A recent example of this process is the CIS scheme that forces companies to electronically communicate with government bodies. This is something that is only going to increase in intensity in the next few years.

You need the new release support service to make sure you don't have to foot the bill for bespoke changes to meet these mandatory requirements.

### **Help Desk Use**

Users can call us any time to get advice and guidance on how to use the system, to report problems to us and for us to help get your use of the solution back on track, quickly and efficiently.

Without this access, users that hit problems will not have anywhere to turn. They will be stuck and will have to start to work around parts of the system. Once that happens, the investment in your Dynamics NAV solution is threatened.

If users stop using parts of the system, introducing their own spreadsheet or paper-based workarounds, the system will become less and less useful.

The automation that offers so much benefit will disappear, making staff less productive and introducing errors into your data.

All users will, at some time, see the tremendous value offered by this element of our support service. Many use the Help Desk a lot and feel that they get great value out of its use based on the volume of calls they make to it.

However, the value offered by this service is not always about volume. Just one call to us on an issue that is crucial to your business can be worth the fee alone.

This support is like an insurance policy – vital to keep in place whether you use it a lot or a little. When you need it, it's a must-have.

### **Bespoke Software Support**

This type of support contract covers you for all additional bespoke programs that we provide as part of your implementation.

Because this does not involve the provision of new releases, the rate charged is less than that for standard support. However, bespoke program support is important as these programs can sometimes be the source of many more queries than standard programs.

The cost of bespoke support is set at 18% of the cost of the bespoke program, and offers access to our Help Desk to resolve issues.

Bespoke support is an important part of your maintenance contract with us. If you have a standard software support contract, but no cover for the bespoke elements, then there could be an instance where the bespoke software causes problems and you have no one to call to get it fixed.

It is fair to say that, should you encounter problems in your bespoke software, we will move to offer a resolution. However, rather than being covered by the one annual payment, we will charge our standard day rates to investigate, diagnose and fix both the software and the data, which might have been corrupted as part of the fault.

Just one incident of this type could cost in excess of the annual fee for all your bespoke-written software. Once again, this contract makes a lot of commercial sense.

### **How We Support You-**

Our office in Coleshill, Birmingham, is the home of the Metaphorix Customer Support function. For more details, see the Metaphorix Customer Support brochure.

## Summary

Metaphorix support contracts offer your organisation the cover you need to keep your installation modern, fresh and robust.

It makes total sense to budget for this annual cost as part of preserving the investment you've made in your systems and the people that use them.

## 6 The Customer Support Process

Having given an overview of the types of support we offer and why it is so important that you have access to it, it is right that we now offer a guide to the use of the Metaphorix Customer Support Desk and related support facilities.

### 6.1 Introduction

Our office in Coleshill, Birmingham, is the home of the Metaphorix Customer Support function.

Through a combination of skilled technical people and structured support procedures, we ensure that there is always a suitably qualified person available to deal with user issues.

Our support team responds to end user problems, technical and installation support requests, and consultancy and planning requirements.

If you have anything you feel the technical team can help with, then this document will guide you through the process by which you can get the required response.

### 6.2 The Team

The support team is made up of three elements.

- The Telephone Support Team
- The Software Development Team
- The Technical Support Team

Our Telephone Support Team is controlled by the Support Administrator whose job it is to coordinate all calls into the Metaphorix Customer Support Desk to ensure a proper response to your queries.

The Telephone Support Team is backed up by qualified software developers and analysts in our Software Development Team.

If any of the issues you report to us involve looking at the programs or the data held on your system, this team will step in to diagnose and fix the problem.

Finally, if issues involve the technical set-up of software or any relationship with hardware, we call on our Technical Support Team to add their weight to the Customer Support function to fix the issue.

### 6.3 Our Skills

All of the team members that make up the Customer Support function are all fully trained in Microsoft Dynamics NAV. Some have taken up areas of the product set and focused on it primarily so that they become expert, but all have a good general knowledge of the system.

In addition to understanding how the system works from their training, most members of the team have real world experience in the daily use and operation of the software.

## 6.4 Third Party Products

We pride ourselves on knowing a great deal about each of the third party products that we supply to our users. In fact, our aim is to answer every query we receive ourselves without recourse to the technical experts of our third party partners.

However, it is important for all customers to feel completely comfortable that, should a more difficult query arise, we can handle it for them. That's why Metaphorix maintains excellent relationships with all the third party suppliers of software products that customers' computer installations depend on.

These strong relationships ensure that we are able to obtain ready access to their technical staff to expedite the resolution of any less familiar technical problems, should they arise.

## 6.5 The Service

Access to the Customer Support function is available to all customers from Monday to Friday. Hours of operation are from 9.00am – 5.30pm on any normal working day.

For those customers that require it, we can put in place additional times and non-working day cover at crucial periods for a fee.

You can contact the Customer Support function by calling the Telephone Support Team on 01675 432400, faxing them on 01675 465571 or you can email queries to them using:

[support@metaphorix.co.uk](mailto:support@metaphorix.co.uk)

Our preferred approach is to receive details by email first, then we can discuss them with you in more detail on the phone.

## 6.6 The Process

The process of handling any support call begins with you contacting us with your query.

### Logging the call

The call, however received, is logged and allocated a unique log number. This log number will be used to reference the call throughout its lifecycle.

After being logged, we send you a response by telephone or return e-mail that gives you the call log number. You should quote this number in all future communication about the call so we can give you the right information.

It is important to note that calls that are not logged via this method do run the risk of being missed.

So if you contact others in the company outside of the Customer Support Team with an issue then you run the risk that the call will not be answered to your satisfaction.

### Categorisation

Once logged, a decision is made about the severity of the problem being experienced so that we can give the call a 'Category'. Obviously, the category will dictate the type of response that the problem needs and we should offer.

The categories and our target response time for each type are shown in the table on the next page. You can see from the table below the categories that we use together with their definition.

CATEGORY	DEFINITION	SLA TARGET
<b>A</b>	System down. No users can work. A serious hardware failure, major software problem or severe data corruption.	<b>Closed within 4 working hours</b>
<b>B</b>	System severely degraded. A number of users cannot work or capacity is seriously restricted. A hardware problem or a software bug.	<b>Closed within 2 working days</b>
<b>C</b>	A facility not available or working incorrectly. Most business operations remain functional. A simple hardware or software problem.	<b>Closed within 5 working days</b>
<b>D</b>	A request for information or assistance. Normal operation of the system is not affected or is impeded in only a minor way.	<b>Closed within 20 working days</b>

## Diagnosis

Once the category is assigned, we move to diagnose the problem. This may mean us using our knowledge and experience of similar issues or it could mean us attempting to recreate it ourselves on our own servers.

Our network of hardware servers and peripherals allows us to replicate reported problems in our own working environment. This is an important step in helping us to understand the cause and produce a proper fix.

Our customer support database holds details of all the problems fixed in the past. We start by checking to see if the database has any record of the problem and how it was handled previously.

If no record of a similar problem exists on our database, we allocate the call to a member of the team with the most relevant experience and they will investigate the problem.

## Fixing the problem

Once we have diagnosed the problem, we move to find or produce a fix.

It is worth noting that in some instances we may not fix some problems immediately because of the circumstances surrounding the issue being reported. For example:

- If the problem is a known one and there is a fix available in the latest version of the software, we may recommend that you upgrade to that version. This decision will depend a great deal upon the priority of the original call.
- If there is a known workaround to the problem, we may recommend this for your use.
- If the problem is a business process problem and not a software fault then we may ask if you want this to be fixed on a chargeable basis.

Some problems may involve consultation with Metaphorix Developers (in the case of products that are developed by Metaphorix), with Microsoft themselves or the authors of the software where Third Party products are installed and supported by Metaphorix.

Following our investigation of how to fix the problem, an expected completion date will be allocated by the support administrator.

## On-going Management of Calls

The performance of the support team in responding to and closing support calls is closely monitored by the Support Administrator.

Our computerised call logging system provides a number of essential management reports that allows us to ensure that the desired service level is maintained.

The Support Administrator is provided with summary reports that enable critical situations to be focused on immediately they are logged onto the system.

Closing the call

Finally, in consultation with the customer, when we are agreed that the issue has been resolved, we will close the call.

Some calls will only involve a chat on the phone and can be cleared quite quickly. If they are cleared, we close them on our system with the customer's agreement. However, if the problem requires more investigation, the process continues.

The Customer Support Process schematic is shown in Figure 1, below.

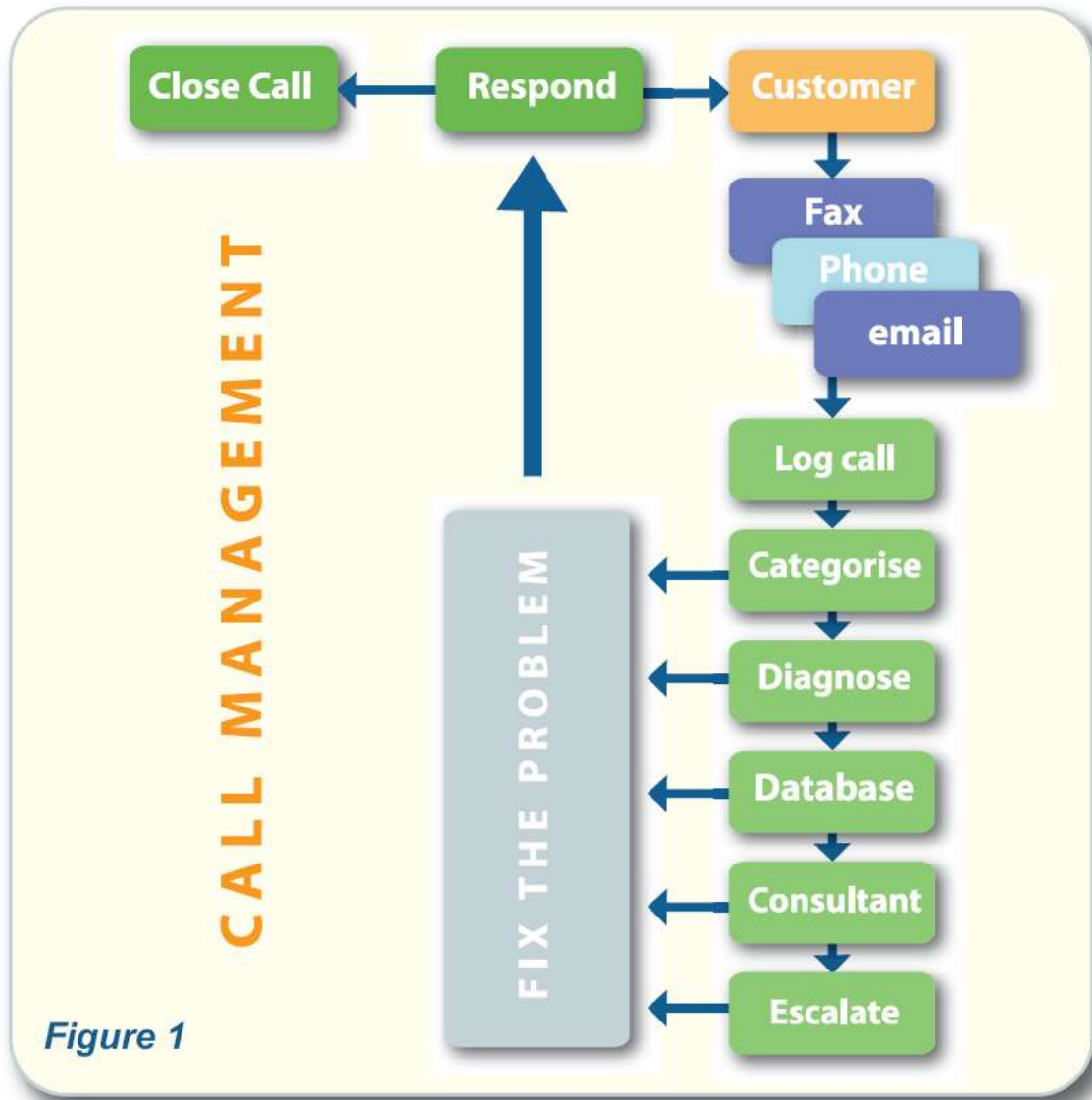


Figure 1

## 6.7 Call Category

One of the important parts of getting the right response to your calls is the way in which we categorise it.

Here is the method we use to define the category that calls fall into and, therefore, what target response time we apply to it.

We categorise calls in four ways depending upon severity. Calls may involve requests for help or advice, a fix to a software problem or a problem with your hardware.

No matter the apparent source of the issue, we would really like you to call us and we will help you to define the best way to get it fixed.

Obviously, if the hardware is at fault and we are not your support company for hardware, we will point you at the right party to answer your query.

### Category D

Calls that seek 'how to use' advice are normally easily and quickly responded to and as such are classified as Category D.

Whilst our target of 20 days to close Category D calls reflects their low impact, in over 90% of cases this type of call is closed in the same day as placed.

If a customer uses the support facility to obtain "how to use" advice on an issue, we are happy to help. We see this as an important service to our users.

However, if Customer Support notices that there is a problem in terms of basic training, misuse of the system or technical assistance outside the support contract, we may recommend additional training.

### Category C

This category of call involves an apparent software or hardware problem that has minimal effect on the use of the system. These we categorise as C.

### Category B

Thirdly, calls may involve an apparent software or hardware problem that is causing quite a bit of disruption to your use of the software overall or in one area in particular. These we categorise as B.

### Category A

Finally, there is the type of problem that is causing you major disruption or it could even mean that you are unable to use the system at all.

This most urgent type of problem must be fixed in the shortest time possible, and so is categorised as an A.

### **Call Category Review**

Whilst we categorise calls at our end, we are not the ones using the system. Only you know just how disruptive the issue is to your business.

So when we feedback to you the status of the call, you can ask us to review the category based on your experience.

In addition, if a call is not closed and the problem becomes worse, we may move to reclassify the call to reflect the urgency it now requires.

## **6.8 Escalation Procedures**

Following the first report of the call we offer an initial response within 1 hour. This response tells you the log number and category allocated to the call.

During the life of the outstanding call, there are several points where it may be escalated to improve the response offered.

### **Daily Review**

All support calls, regardless of their priority, will become urgent if left unresolved for long enough.

However, you would expect us to apply ourselves to the most urgent calls ahead of others and so we monitor our support levels based on our ability to process and close category A and B calls.

Based on this, a review is carried out by the Support Administrator to examine the status of each outstanding category A or B call at the end of each day.

If our SLA targets are not being met, appropriate internal problem management and, if necessary, escalation procedures are initiated, involving senior management on both sides.

### **Escalation**

Either the customer or Metaphorix can initiate escalation of any outstanding issue.

This will result in the involvement of senior management in Metaphorix to assist in progressing the matter with even more urgency to make sure we get a fix.

## **6.9 Help Us to Help You**

So that we can give you the best possible service from the Customer Support Desk, we would like to ask you to consider handling calls from your side in a way that helps us to deal with them more efficiently.

For us, the right approach from your side is to assign one person to be the 'Prime Contact' with us. They might be a member of the management team or perhaps someone from your staff that has a technical background.

This person will be responsible for co-ordinating all issues from the customer end. The Prime Contact will have the following responsibilities:

- Logging all support issues with Metaphorix.
- Prioritising support issues.
- Providing feedback to your management team.
- Alerting Metaphorix about major infrastructure changes.
- Alerting Metaphorix to any changes made to the software by you or a third party.
- Offering us a single point of contact for all responses.
- Organising regular meetings or conference calls with our Customer Service Consultant to discuss the status of your installation.

## 6.10 Additional Services

Although the primary purpose of the Customer Support function is to solve customer problems, the analysis of support calls also helps us to see other areas where we can offer assistance.

### **Better use of the system**

This could involve us pointing out areas of the existing installation that appear not to be fully utilised at the moment.

It might also mean us recommending additions to your suite of software to help you to gain more automation and greater efficiency out of the use of our solution.

### **Better knowledge of the system**

Where there appears to be an area of the system causing you more concern than others, it might be because you are lacking the right level of knowledge about the system and its functions.

We can help you to improve your knowledge through education, held on your site or ours.

### **eCommerce and Web Services**

We recognise that integrating business processes helps to make you more efficient and can save money.

Making processes and data available to people outside the organisation, or from within the organisation when they are out on the road, is one way to deliver this integration.

We can recommend ways in which specific functions can be automated using the latest Microsoft technology. You can compare the cost of implementing these changes against the savings they will make and decide if it is worth going forward with them.

## 7 Customer Events

Metaphorix runs occasional events aimed at keeping customers updated on important topics in the software or technical arena. Microsoft also holds events, as do our third party product partners.

All of these we make available to you – either as a physical event you can attend, a one-on-one meeting that you can request or a virtual event via webinar.

The normal method of announcing these events is through the Metaphorically Speaking and typical events include the following.

### **Technical Education**

Events such as SQL training, web services application development and reporting services.

### **Product Education**

This offers education in specific functional areas such as finance, distribution, warehousing, purchasing and manufacturing together with third party updates and education for products such as Jet Reports, QlikView and Zetadocs document management.

### **New Release Updates**

Normally held at Microsoft, this is done each time Microsoft makes a major announcement about developments in the product set you use.

### **Metaphorix Customer Days**

Every 2 years we hold an event that gives all customers a chance to see the latest developments in every area of the product and service we offer.

This is held at two locations – in the Midlands, near our head office in Coleshill, and in a southern location such as Microsoft's offices in Reading.

## 8 Case Studies and References

It is very important to us to make sure you are a happy customer. We do this by keeping you updated through the visits of the CSC and the Metaphorically Speaking newsletter.

We also do it through the Help Desk service that makes sure we keep you running and advises you on different issues you might have with your software.

If we manage to achieve the goal of making you a satisfied customer then we like to publicise that by doing a case study.

In addition, when we are trying to convince new users to install Dynamics NAV with Metaphorix, we need your help to give testimony to the fact that the software works well and that we support you properly.

This process helps us to know if we are doing the right things for you and helps us to attract others to do the same as you have, adopt Metaphorix as their systems supply partner.

So we are sure that you can appreciate that this area is very important to us.

### Case studies

In fact, there are two types of case study that we do. The first is our own, which gives a view of how Metaphorix and Dynamics NAV worked for you. The second is a Microsoft case study that is simply a view of the products and services offered by Microsoft and how well they performed.

### References

This involves either a short telephone call or a longer site visit that is arranged to suit you and a full agenda published before hand so you know what is expected and what to expect from the visiting company.

There can be real tangible benefits for customers doing reference visits as Metaphorix says thank you to you for helping us, giving up your time in support of our sales efforts.

If you do feel able to help, your CSC will guide you through the process of producing a case study or being a reference. Throughout the production of the case study you retain total editorial control – and you also get to say how it's used.

To give you an idea of what's involved, the next two sections give an overview of the questions that are asked as part of producing a case study and as part of carrying out a reference call or visit.

## 8.1 Case Studies

The following areas and topics are covered during the interview to produce a case study. The interview is carried out by your CSC.

### 8.1.1 Organisation Profile

Details of company here (often we can take these from your website).

### 8.1.2 Business Challenge

Was there an existing ERP system? From whom and what was wrong with it? Why did it need to be changed?

What other business issues led to the decision to change the system?

When did the evaluation/search for a new system start?

### 8.1.3 Solution Deployed

What was the process of looking for a new solution that you went through?

Why did you choose Metaphorix?

What did you install? (e.g. NAV, CRM, MetaBuild, QlikView etc.)

How long did the install take, how did it go?

### 8.1.4 Benefits Achieved

What benefits do you feel you got from the implementation, did it fix the issues listed in the Business Challenge section?

What is it like, working with Metaphorix? Do you have any views on their people, their approach and their support service?

### 8.1.5 Pictures and Quotations

It is very helpful if you can provide a quote that we can use in the case study along with any high resolution photographs that we can use to represent your business in the case study.

Most importantly, could they provide a high resolution copy of your logo?

## 8.2 Reference Visits

Criteria for reference visits cover a number of areas including functionality, the credibility of the people working on the project from the Metaphorix side, the working relationship between the customer and Metaphorix, the success of the implementation and the after-sales support offered.

The reference visits that we organise seek to cover each and all of these aspects of our reference-ability.

Below we have listed the elements we believe that a prospective customer will want to reference as part of their call or visit.

### 8.2.1 Functionality

The reference visits should be able to cover key areas of function that the prospective customer is interested in.

### 8.2.2 Credibility of the Supplier

This will involve a discussion with a customer to find out if Metaphorix were knowledgeable about the product set, Dynamics NAV, and the areas covered by the implementation.

How were the consultants involved in the project, did they understand the business processes or offer suggestions as to how issues might be handled?

Did the customer feel that Metaphorix helped, supported and advised them during the implementation?

### 8.2.3 The Working Relationship

It is very important in any successful project to form a working relationship that allows the project to run smoothly.

Part of the reference will be to understand if the Metaphorix personnel were easy to work with, easy to get on with and if the customer's team felt they had a good working relationship with us.

### 8.2.4 The Success of the Implementation

This will give a perspective on the way the project worked overall and how it ultimately turned out.

Timescales, budgets and the level of functionality delivered will be covered here.

### 8.2.5 After-sales Support

How well do we support the customer through our Help Desk and other services?

Having installed the solution, the continued good health, efficient use of the system and the value it delivers to the business will depend largely on the kind of support your team can count on from Metaphorix.

## 9 Customer Feedback

We are always keen to get feedback on our performance so we can improve what we do and make sure we retain you as a happy customer.

There are two types of feedback that we get – informal and formal.

### 9.1 Informal feedback

All customers are encouraged to give their feedback to us informally. There are various methods.

- Through your CSC on one of their regular visits.
- Through the website, contact us section.
- To any member of our Help desk staff.
- Directly to your account manager.

All feedback is taken very seriously and we do our best to answer every query positively.

### 9.2 Formal Feedback

At the moment there is only one method to offer formal feedback and that's through the twice a year customer satisfaction survey carried out for Microsoft by an independent third party.

#### 9.2.1 Customer Satisfaction Survey

Microsoft wants to make sure we are supporting you properly so they regularly roll out their Customer Satisfaction Survey (CSAT) and our CSR manages this process.

##### How does it work?

This bi-annual survey is conducted by TNS, an independent research company on behalf of Microsoft. Our CSR gives TNS a list of your email addresses (provided that you agree to take part) and they send out an email to you, inviting you to participate in an online survey that takes about 10 minutes to complete.

Your responses are compiled into an index by TNS, which is used by Microsoft to judge our abilities as a support partner. It is also given to us so that we can take your responses into account as we plan changes to the way we work with you.

You should be assured that your privacy is totally respected and your contact information and responses will not be shared with Microsoft at any time. You can choose to respond anonymously or you can give us your name, either way is great as we just want you to respond. After all, how can we get better if we don't understand what we need to focus on?

##### What's in for you?

In an attempt to say thank you to those who responded we offer a little incentive. We are not allowed to see the actual responses, so we don't know who did respond. However, if users email our CSR after completing the survey telling us it's done then we enter you into a draw to win a technology related prize.

The customer satisfaction survey is a good way for us to find out what our customers are thinking, so we do ask you to consider completing it when asked as it could help us to improve the way we support you or to resolve any issues you have with us.