



# CustomerSupport

## The Metaphorix approach to supporting your installation

Metaphorix Customer Support is the part of the business that looks after your installation of the Microsoft Dynamics CRM software, third party software and enhanced components of the solution built by us to your specification.

This is an introduction to the Metaphorix Customer Support service. It will also help to act as a guide to the use of the Metaphorix Customer Support Desk and related support facilities.

### 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.

### 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.

### Our Skills

All of the team members that make up the Customer Support function are all fully trained in Microsoft Dynamics CRM.

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.

### 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.

### 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.

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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**.

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

## 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 Figure 1 that 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.

### 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.

The Customer Support Process schematic looks like that shown in Figure 1.

## 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 | 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 1 working day</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 10 working days</b> |

## 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 notice 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.

## 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.

## 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.



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## 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.

## ABOUT METAPHORIX

Metaphorix helps small and medium-sized companies change the way they do business with their customers and with their suppliers.

Using the Dynamics suite of ERP and CRM software from Microsoft, together with our high quality professional services, we evolve your business processes to deliver a faster, more accurate, more productive and more efficient business model to the benefit of everyone that interacts with it.

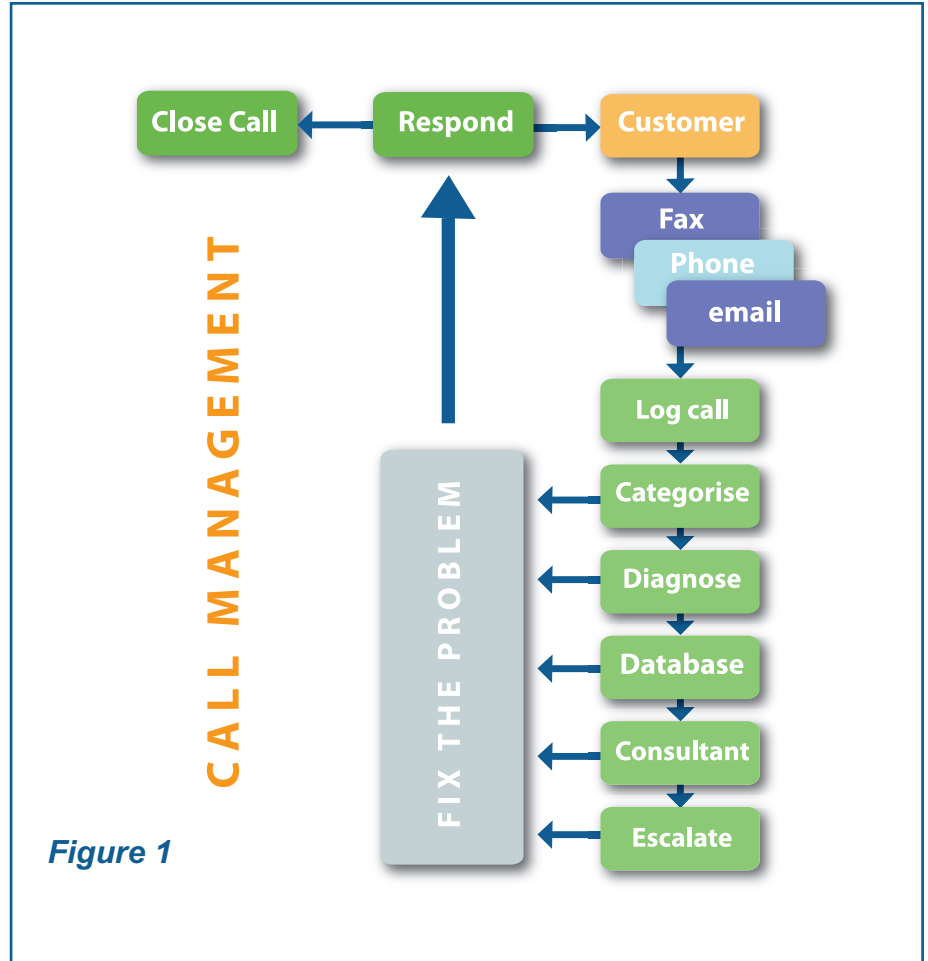


Figure 1

Since its inception, Metaphorix has been leading the way in implementing Microsoft Dynamics solutions.

We began life in 1998 as the Software Solutions Division of Mitsubishi Electric. Breaking away from our parent company, we conducted a careful review of the major ERP and CRM solutions on the market.

The company decided to focus on the delivery of just one product set, Microsoft Dynamics.

Having made this decision, we set out to structure our services portfolio to ensure its successful implementation for all our clients.

Metaphorix is now one of the premier partners for Microsoft Dynamics in the UK and a consistent top performer in terms of new customer installs and customer service.

Today the company has a strong customer portfolio in our chosen vertical markets across the SME and Corporate sectors.

As a Microsoft Partner, we provide extensive Microsoft product support to our growing customer base.

We have continued to invest in our staff and their skill base to help us to build a product portfolio that offers a complete solution set for all our customers.

Our unique approach to delivering projects, offering fixed price contracts, means that our customers know exactly what they are getting for their money.

That's why we are the partner of choice for over 100 companies, from construction and manufacturing to retail and distribution.

For more information about our products and services, please call: **01675 432400**, email us at: **sales@metaphorix.co.uk** or visit our website: **www.metaphorix.co.uk**

# Metaphorix

  
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