

CUSTOMER CASE STUDY: OSISOFT

# Serving Customers Better



If the health of your systems infrastructure is absolutely critical to your business, chances are you already know OSIsoft. The company's PI System is the industry standard in enterprise infrastructure, for management of time series data and events. Serving the Who's Who of power companies, oil and gas companies, and other major manufacturers, OSIsoft's products analyze massive amounts of systems data minute by minute, enable improved business intelligence about the manufacturing process, and give an early warning of potential issues.

The OSIsoft support organization is the "last link" in making sure customers have an excellent experience. Made up of seven different departments, the support organization architects solutions, implements the solutions, and trains the customer teams. They then keep the solutions humming with a technical support staff of degreed engineers.

**"I needed to get all these smart people working together and pulling in the same direction."**

Don Smith  
Vice President of Global Support

With some 200 highly educated support people spread across more than 10 different countries, OSIsoft needed a way to enable each member of the support team to leverage the brainpower of the full team. "I needed to get all these smart people working together and pulling in the same direction," said Don Smith, VP of Global Support. "I wanted to get all my highly skilled people collaborating at the front line level, about what we should be doing and how we should be doing it. They are in the best position to steer how we serve our customers."

Don wanted to help foster a culture of empowerment, passion and initiative. He knew this required that he find a way to resolve a number of age old issues. To realize his vision, he turned to the Socialtext collaboration platform.

## Summary

### OSIsoft Vision

- Empower the members of the support organization to actively contribute to knowledge creation and solution development
- Improve the customer experience and provide tools to help them solve their problems
- Increase quality of service
- Decrease the time to resolve each case
- Reduce the need for escalation and empower the first line of support

### Problems

- Knowledgebase not keeping up with demand
- Knowledge locked in people's heads
- Limited ability to leverage each other's work
- Difficult to ensure consistent answers
- Too many sources of information, not enough intelligence

## Summary

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|--------------------------------|---|
| <b>Solution</b>                | <ul style="list-style-type: none"><li>• Socialtext Collaboration Platform, with wiki workspaces and rich people profiles</li></ul>  |
| <b>Results with Socialtext</b> | <ul style="list-style-type: none"><li>• Timely knowledge and insight; 15 fold increase in new internal articles per month</li><li>• All work done openly and fully leveraged by team</li><li>• Global customers supported in a more consistent way</li><li>• Customer problems solved much faster; often in minutes vs. hours</li><li>• A strong sense of team; everyone contributing</li><li>• Improved communication and cross-departmental collaboration</li></ul> |

## Needed: timely knowledge and insight

The first issue was that of timely knowledge and insight. Since OSIsoft is in the business of providing real time insight to their customers, they understand the value of timely knowledge. Yet only a fraction of the knowledge needed to resolve new customer issues quickly and effectively was readily available to the technical support team. Their knowledgebase was sparsely populated, because it is difficult and time consuming to add new articles. New knowledge articles were being published at a rate of less than three a month, a pace that was nowhere close to keeping up with demand. At the same time, OSIsoft knew that each person in the group had a wealth of knowledge and experience that could benefit the entire team. “The information was locked in each person’s head,” said Steve Nye, Global Support Manager.

When the knowledgebase came up short, the support engineers would scrutinize the various records in the case management system to try to piece together information and work up the best response possible. Don recognized that this was time consuming, and led to answers that were inconsistent: “Support engineers in different parts of the world serve the same customer with the same problem. We want those customers to get the same answers.” Providing Everyone With Access To Content, Colleagues, and Conversations

## Needed: collective intelligence available to everyone

In addition, the effort a support engineer put into helping one customer could not easily be leveraged to help the next customer. The next support person who was faced with the same issue would have to wade through a sea of previous case records to find a solution that helped. If they weren’t lucky enough to find the nugget of insight they needed, they were forced to recreate all the same steps and to piece together their own answer. Don wanted an easy way for everyone to contribute insights and learnings, in the moment, so others could benefit from them immediately: “We wanted the collective intelligence of the entire team to be available to every member of the team, and for everyone’s work to be leveraged by everyone else.”

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## Removed many barriers to knowledge sharing

OSIsoft deployed Socialtext to help remove barriers to sharing knowledge. “Socialtext makes it really easy for everyone to contribute,” said Steve. With Socialtext, when a support engineer comes across a new issue, they just type what they learn about it on a page in their tech support workspace. Other team members are then automatically alerted to the new page, and can add their own insights and knowledge. As progress is made on the issue, the page continues to get updated. For example, as soon as someone identifies a viable workaround, this would get added to the page. In this way OSIsoft builds an organic repository of what the organization knows about the issue, and how to best help any customer who is impacted by the issue. OSIsoft also added a button in the case management system to open a new page in their Socialtext tech support workspace, formatted with a pre defined template. Steve explains that now, when a support engineer encounters a new issue, he or she simply clicks the button and fills in

what they've learned, right then and there in the flow of their work: "We tried to make it extremely easy to add knowledge. The support engineer is no longer intimidated by a laundry list of steps to get a simple concept added to our shared knowledge base."

## 15 fold increase in the rate of new knowledge articles

Now OSIssoft support engineers have an easy way to contribute knowledge and insights, and have the satisfaction of knowing their contributions help their teammates. Using Socialtext, OSIssoft is now generating 40-50 new internal knowledgebase articles per month, a 15 fold increase over the former pace. In addition, each nugget of information someone contributes can now be put to use right away by someone else, without waiting for it to finish a complex review process. "Support engineers can now provide the kind of service each wants to provide to customers – a fast diagnosis and 'one and done' resolution," said Don.

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## More consistent answers, much faster problem resolution

This has built a strong sense of team, where support engineers can more easily work together in serving customers. In several specific cases, it has clearly improved the speed at which OSIssoft was able to resolve the customer problem. Don outlines the net result for customers: "With knowledge propagating so much faster, our customers get more consistent answers and much faster problem resolution."

## One team with a strong sense of purpose

When the support organization started using Socialtext for world wide knowledge sharing, the product engineering team got much more involved. "Before we deployed Socialtext, we couldn't discuss a product issue in a way that would benefit the larger group," said Steve. "The discussions were all private." Exchanges about product issues took place in the hallway, via e mails or through phone calls or web chats, and the only ones who benefited were those who happened to be in on the private conversation stream.

"Now we can have a meaningful discussion about a product issue in a way that is open, where everyone can benefit." In Socialtext, every contribution is marked with a person's picture and profile link. A click to a person's profile shows a rich picture of who they are, complete with their recent activity, who they are following, and tags that describe their skills and interests. Don expresses it this way: "With Socialtext people feel like they have their own personality stamp. Support people around the world now feel like they are part of one team. They know each other, and they rely on each other, which fires them up. And they're much more tied in with the product engineering team. Socialtext lets us have a constructive conversation with all the right people."

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Steve adds to this: "We all want the same thing; we want accurate information to get out into the hands of customers. Now with work being done openly in Socialtext, everyone knows what's going on, and every effort benefits the whole team. It is a much better use of time for product engineering to answer a question on a workspace page where everyone can benefit from it, instead of answering it repeatedly, one call at a time."

## Automatically aggregate information from multiple systems

In order to fully empower their support team, OSIssoft wanted to use Socialtext to resolve another age old issue: support engineers had to traverse multiple systems to resolve each customer issue. Prior to deploying Socialtext, when confronted with a new customer issue, the support engineer would first check the knowledgebase and, when that came up short, they would check the case management system for a similar case. Finally, they would traverse to yet another system, the bug tracking system, to review bug status. OSIssoft turned to Socialtext to aggregate information from multiple systems and turn it into easy to consume intelligence.

Using the Socialtext REST API, OSISOFT now automatically populates the Socialtext tech support workspace with the bug reports and knowledgebase articles, pulling the information from the different systems into Socialtext. The bug report pages are automatically tagged with the bug's Priority and Status, and the Product affected by the bug. "Putting the information in Socialtext made it highly findable and consumable," says Don. OSISOFT configured widgets in Socialtext to filter in the specific information they need, exactly as they need it. For example, they use one widget to filter in an always current list of all the highest priority bugs, and other widgets to filter in bugs by type, by product, and so forth. Users do not have to spend time querying a database each time they need this information; it is displayed persistently and is always current.

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## Early warning of big issues

By putting all the essential customer information in Socialtext, OSISOFT now gets to use the reporting metrics in Socialtext to monitor which knowledgebase content gets the most views. This gives them a way to see which topics need the most attention so they can focus on work that is the most leveraged. It also gives them a new strategic advantage: an early warning sign of potential high volume issues that are just starting to build.

## Sped up Premier Support process 10 fold

There was another operational issue Don set out to resolve with Socialtext. With Premier Support customers, support engineers feed information directly into the customer's IT systems to trigger activity at the customer site. In order to do this, the support engineer has to know what types of issues each customer wants reported, as well as precise instructions on the format for submitting information into their systems. Prior to deploying Socialtext, OSISOFT kept this information in documents, stored in their document management system, SharePoint. With each new customer issue, a support engineer would have to spend 10 minutes searching for all the necessary customer information. OSISOFT wanted to make this information readily available, to compress the time it took to serve the customer, and to reduce the time their engineers spend on non value add work.

To do this, they moved the premier customer information out of SharePoint and onto Socialtext workspace pages, making use of basic tagging and attachment features to create easy to access templates. So from the customer page the support engineer simply clicks open the template and fills in the necessary fields to submit the information into the customer's system in the right format. Steve articulates the benefit: "With these simple changes, we've sped up this process 10 fold. Using Socialtext, we get to the customer problem a lot faster."

"If we bought Socialtext for this one function alone it would be worth it," said Don. "We can now give our customers gold star performance. For a support manager, it is a dream."

## Support team empowered to collectively impact the customer experience

Working openly on workspace pages and monitoring the activity feeds and alerts that are part of the Socialtext collaboration platform, OSISOFT's entire world wide support organization is much more informed about the issues affecting the customers they serve. Conversations now benefit the entire team, and everyone contributes. Don sums it up: "Team members know what is going on, they can now recognize when there is a problem and they can jump in and work together to solve it." The result? "Socialtext lets smart people respond to the problems that come up every day and solve those problems themselves. With Socialtext, we can serve our customers better. Socialtext has given us a deeper relationship with our most valued customers. This is the ultimate for management. Socialtext enables it. Other systems were not agile enough."

**"Socialtext is core to our success. Support says they can't live without it."**

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“Socialtext is core to our success. Support says they can’t live without it,” continued Don. “If our company had only 6 months to live we would still keep Socialtext.”

## Socialtext adoption was “explosive”

“We’ve never had a system where such a large number of people took to it,” said Don. “We’ve had wikis before, we have SharePoint, we’ve had other systems for sharing information – none of them used. Socialtext took off in an explosive way.”

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## Expanding the value that Socialtext provides

Now that OSIsoft has used Socialtext to empower their support team and deepen their relationships with customers, they are setting their sights on the next strategic horizon. A survey of their customers revealed that 40% would like the option to self serve when they have a question or issue, especially those customers whose native language is not English. Today OSIsoft gives self serve access into the knowledgebase, but customers often can’t find what they need. Don previews what’s coming next: “We need to make it easy for customers to get what they need, just like we did for our support team.”

## About Socialtext

Established in 2002, Socialtext is the first company to deliver social software to businesses. By unlocking knowledge, expertise, ideas and data, Socialtext eliminates information silos across the enterprise to drive superior business performance. Socialtext’s enterprise social networking products — including microblogging, blogs, wikis, profiles and social spreadsheets — provide simpler ways for employees to share vital information and work together in real-time. Delivered in a variety of hosted cloud services, as well as on-site appliances, enterprise customers are provided with flexible deployment options that meet their security requirements. Built on a flexible, web-oriented architecture, Socialtext integrates with virtually any traditional system of record, such as CRM and ERP, enabling companies to discuss, collaborate, and take action on key business processes. More than 6,500 businesses worldwide have accelerated their business performance with Socialtext, including Oxford University Press, Egon Zehnder, Getty Images, Symantec, Meredith Corporation, NYU Stern, OSIsoft, and Epitaph Records. To learn more, visit [www.socialtext.com](http://www.socialtext.com).

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