InfoStrat

Implementing Microsoft Parature:

A step-by-step guide to get the most of your Parature investment

An InfoStrat White Paper

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Background

Microsoft Parature, from Microsoft, enables personalized customer care experiences. Microsoft Parature is a cloud-based help desk/customer service management application that enterprises can deploy to provide self-service capabilities to their customers. Parature's knowledge management system, self-service portals and multi-channel engagements allow customer service representatives (CSRs) to deliver more efficient and effective service. While Microsoft Parature is obviously useful for organizations that have significant customer support demand, it is also a tremendous value-add for organizations of all sizes as they seek to provide excellent 24x7 customer service to both current and prospective customers. However, the process of implementing a Microsoft Parature implementation is not well understood and involves several key steps to achieve the optimal results.

Executive Summary

Microsoft Parature is comprised of a Service Desk that helps CSRs manage the flow of customer inquiries efficiently and route them through an escalation process to ensure complete customer satisfaction. It also provides a customer support portal for customers to use to submit tickets, search the knowledgebase, or chat with a CSR to help them get answers to their questions. Parature is strictly a cloud-based system and is in use on many highly visible web properties (for example, the Social Security Administration and Ask.com).

This whitepaper will provide an overview of the Microsoft Parature Service Desk and the Microsoft Parature Customer Support Portal and provide detail on the steps to set up and configure a Microsoft Parature system tailored for your organization based on the lessons learned by our staff.

Microsoft Parature Components: 30,000 foot view

Cloud Service

Microsoft Parature is strictly a cloud-based service only. There is no “on premise” version of Microsoft Parature.

Service Desk

This component is for the use of the organization’s Customer Service Representatives. Knowledge management: The Parature support solution provides easy-to-create, easy-to-access content that can be delivered both internally to CSRs and across all major service channels to the customer, for real-time updates, deflection of frequently asked questions, and improved first contact resolution.

Multi-channel engagement

With this feature customers can reach your organization at any time in whatever way and through whatever channel is most convenient for them, whether it’s live chat, email, self-service portal, social media or mobile.

Customer Support Portal

Microsoft Parature provides a support portal designed for current and prospective customers of the organization. The Parature self-service portal combines a custom-branded, mobile-responsive support portal with a searchable knowledge base, support ticketing, and other multichannel contact options, such as live chat, to deliver real-time answers, increase customer satisfaction, and deflect a high volume of frequently asked questions.

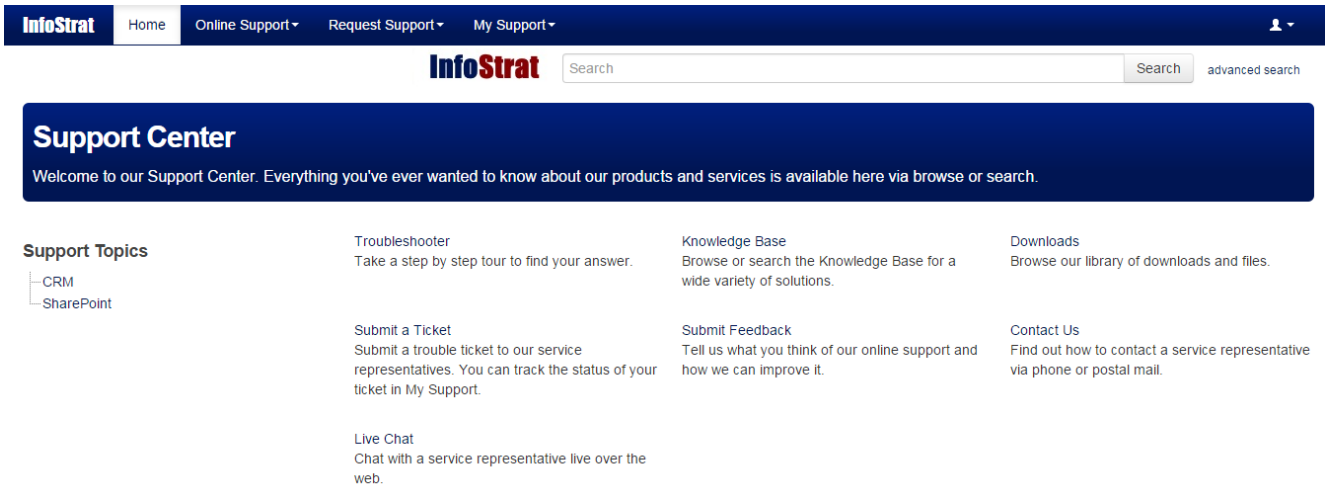


Figure 1: Customized InfoStrat Support Portal

Setup Module

The Setup module is where your Parature Administrator can tailor Parature to meet your organization's specific needs by adjusting the configurations for each module.

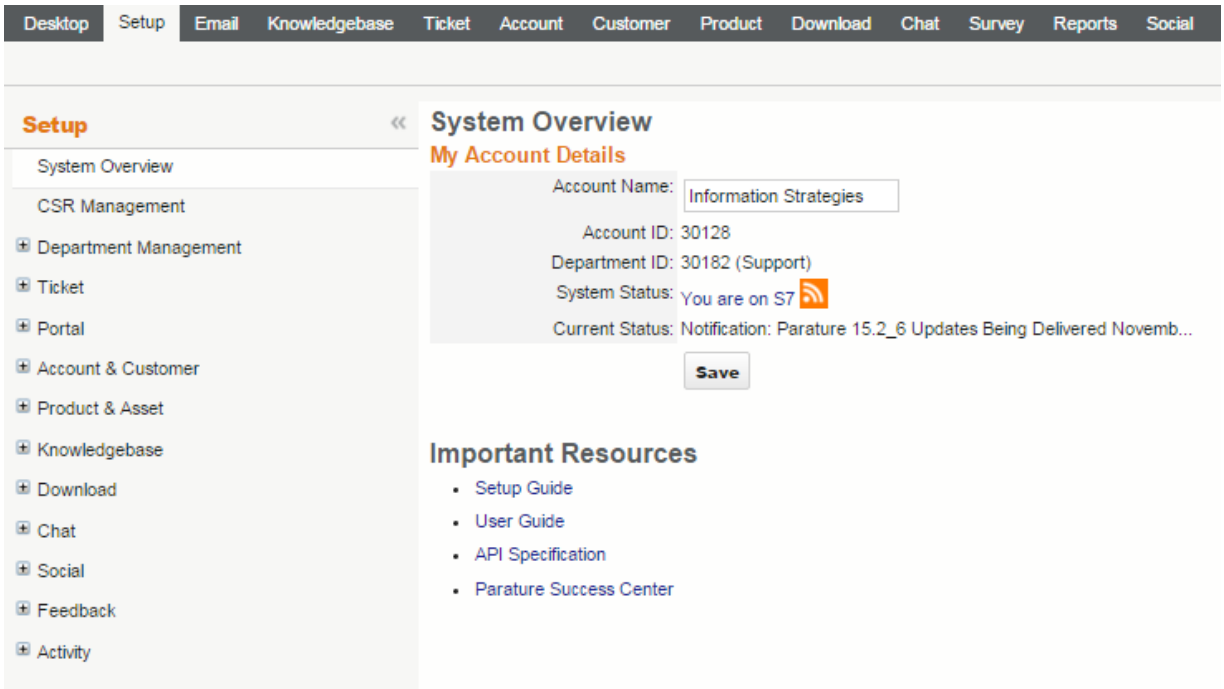


Figure 2: Setup Module Interface

Ticket Module

Tickets are an important communication vehicle for your customers to report issues to your support team when they experience issues or have questions about your products or services. Tickets can be requests for services – such as returns or exchanges – or for reporting technical defects with your products. Tickets are versatile and easily accessible for both CSRs and customers and can be customized to suit a variety of purposes.

Account & Customer Module

The Account module is used to manage Accounts, which are groups of Customers who share a Service Level Agreement (SLA). Accounts allow CSRs to view groups of Customers and their data together in one dashboard and manage shared Products, Assets, Tickets and Chat histories, and permissions.

Customers are the individuals that your organization serves by selling products or services and providing support resources for those products and services.

Product & Asset Module

The product & Asset module is where you can catalog, manage, and keep track of the goods and services that your organization provides to customers. By creating a catalog of products, you can keep track of individual instances of these products (assets) that your customers own and help provide personalized support to your customers. You can also associate Ticket fields, knowledgebase articles, and other data with products to help streamline what customers have access to through your support portal. This can help simplify the support process for both the CSR and customer.

Knowledgebase Module

Parature provides easy to create, easy to access content that can be delivered both internally to CSRs and across all major service channels to the customer. Knowledgebase management ensures consistent answers and information disseminated to all customers. Knowledgebase management also ensures around the clock self-services access to information and reduces repetitive questions and increases first contact resolution rates for customers.

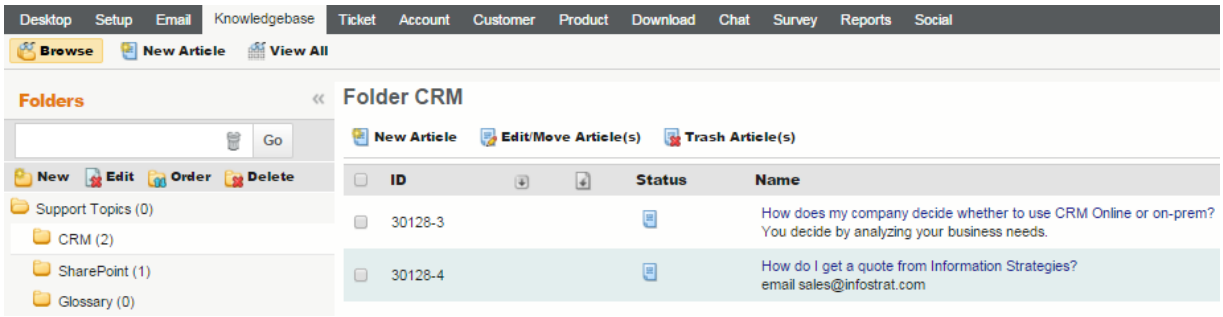


Figure 3: Knowledgebase Article Management

Download Module

The Download module serves a similar function and presents similar setup and organization steps to the Knowledgebase Module. The Download Module allows your organization to provide information via downloadable information. Articles, images, and videos are examples of downloadable resources you may want to provide directly to your customers or attach to a knowledgebase article as support documentation.

Chat Module

The Chat module allows your CSRs to directly provide service and support to customers in real-time through a customizable chat interface. By using the live chat communication method, organizations can provide a customized experience while CSRs utilize the fully integrated Service Desk Chat module to produce the most helpful and efficient support experience for the Customer.

Social Module

The Social module allows your organization to monitor your social media channels, such as Facebook, Instagram and LinkedIn, and provide service and support through each configured social monitor. Parature's Social Monitor enables CSRs to manage all social channels through the Service Desk interface.

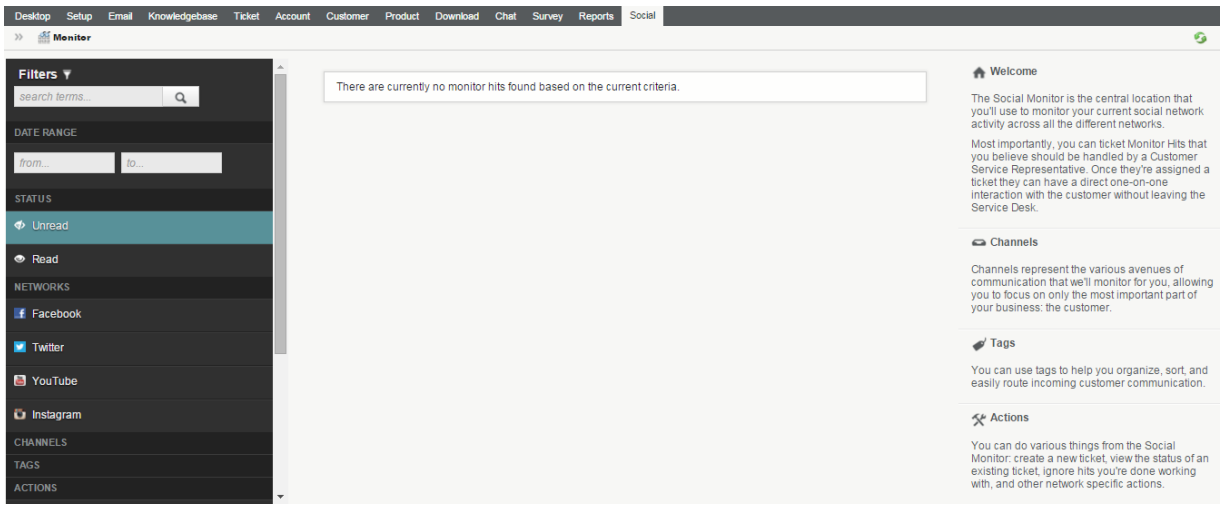


Figure 4: Social Media Monitoring Interface

Feedback Module

The Feedback Module is used to enable and configure feedback capabilities for other modules like Tickets and Chat. Feedback is used to gather information from your Customers about the service experience provided by your organization. Custom questions and feedback styling can be applied to meet the needs of your organization through the Feedback setup module.

Activity Module

The Desktop Tab provides a dashboard area where CSRs can create, accept, and manage Tasks and Events. Custom Task and Event fields are managed through the Activity Setup Area. An Event, in reference to the Parature Service Desk, is a time-based reminder while a Task is an objective-based milestone that can be assigned to a CSR or Team.

Step One: Take a TestDrive of Microsoft Parature

You can take a test drive of Microsoft Parature to get an overview of the main areas of the product including knowledge management, self-service support, and multi-channel support on the Microsoft Parature website: Take a TestDrive

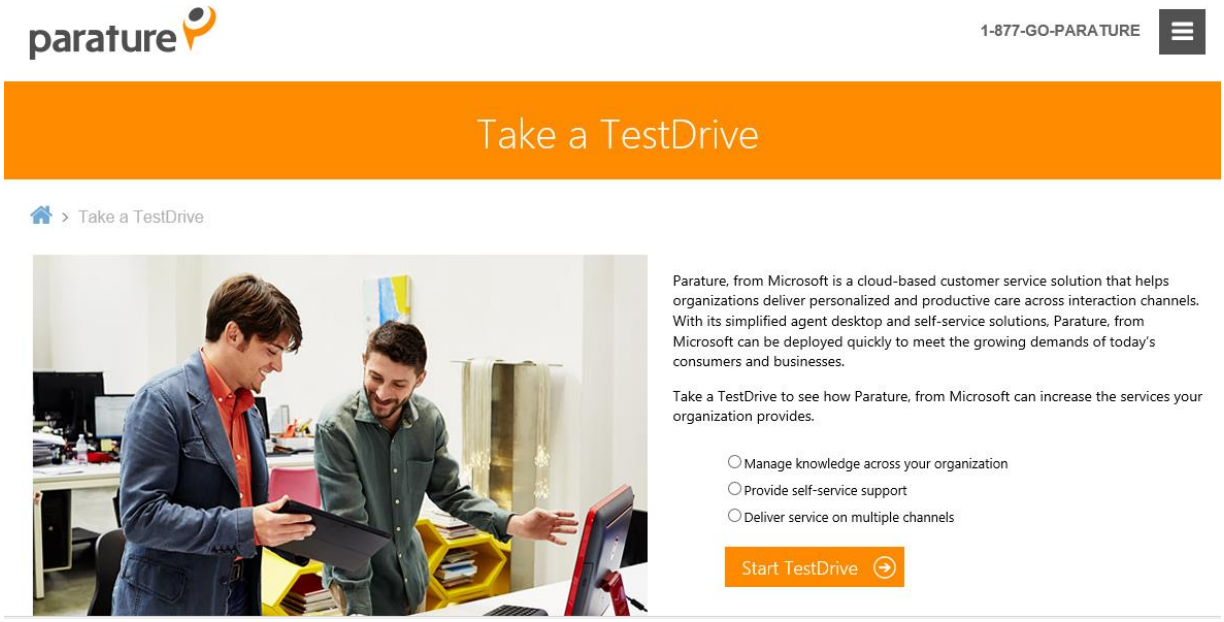


Figure 5: Parature TestDrive

The TestDrive will walk you step-by-step through an interactive demonstration of Parature features including managing and publishing knowledgebase articles, optimizing and utilizing the features of the Customer Support Portal, and demonstrates the multi-channel support your organization can provide to ensure a wholesome and engaging customer support experience. The TestDrive highlights the features and advantages of the Service Desk Module that will provide your organization with a complete overview of Parature and the Customer Support advantage it will provide your organization.

Step Two: Request a 30-day managed trial of Microsoft Parature

Once you completed your TestDrive and are interested in moving forward with testing the Service Desk features to see how Parature can meet the needs of your organization, the next step is to conduct a 30-day managed trial of the product. You can request a managed trial at: Request a Trial

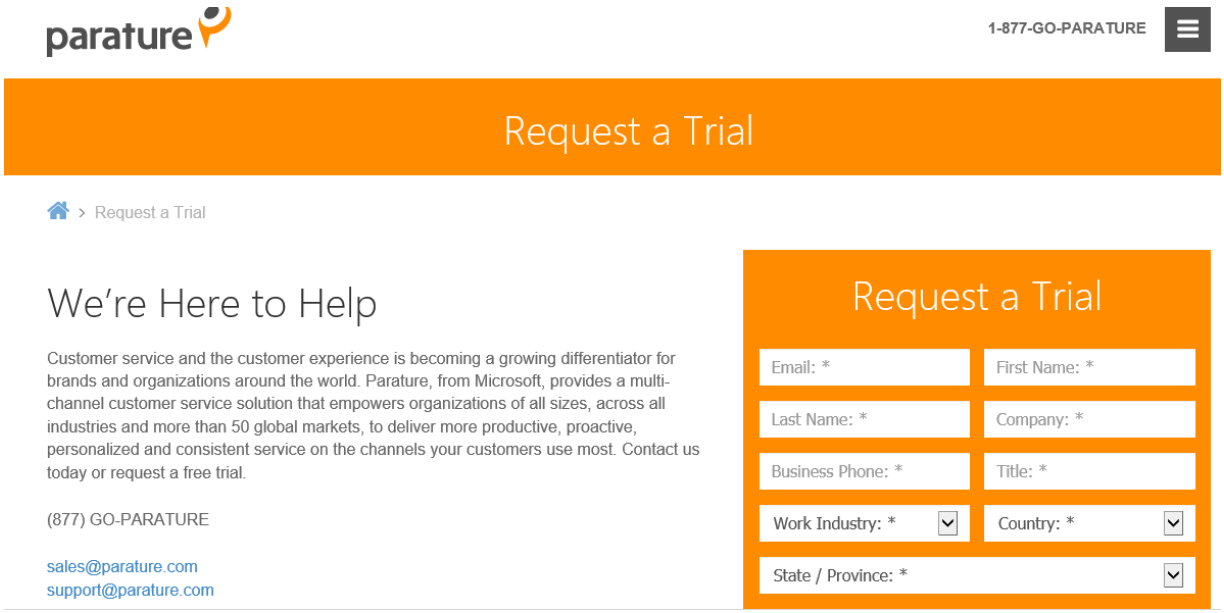


Figure 6: Parature 30-day Trial Request Form

Step Three: System Access and Setup

CSR Management

Once Parature licenses are procured and a service desk instance is created for your organization by Parature, system access for the service desk needs to be configured for your Customer Service Representatives (CSRs). CSRs are the agents responsible for providing front-line service to your customers from the Customer Service Portal through the service desk.
All CSR creation and deactivation must be done in Office 365 (*All prior Customers to Jan. 2015, can create and deactivate CSRs directly in the Service Desk). CSRs cannot be directly created or removed through Parature Service Desk. Each CSR must be granted a license in Office 365 before using their CSR account. However, Admins can create API CSRs to view, edit and delete in the Service Desk for specific integration scenarios. To manage and edit CSR roles or information, you can click a CSR's name from the list in the Setup module. This will bring you back to the CSR's profile. You can use the same check boxes, drop-down menus, and text fields to update a CSR's roles and information.

For step-by-step details on CSR creation, go to:

Manage CSRs

Each service desk module has its own permission levels. Unused modules can be hidden from CSRs by removing permissions from those areas. CSR information is initially configured by a service desk administrator for the preliminary login to the service desk. Once the CSR successfully accesses the system, they can manage their user information through the “My Settings” area.

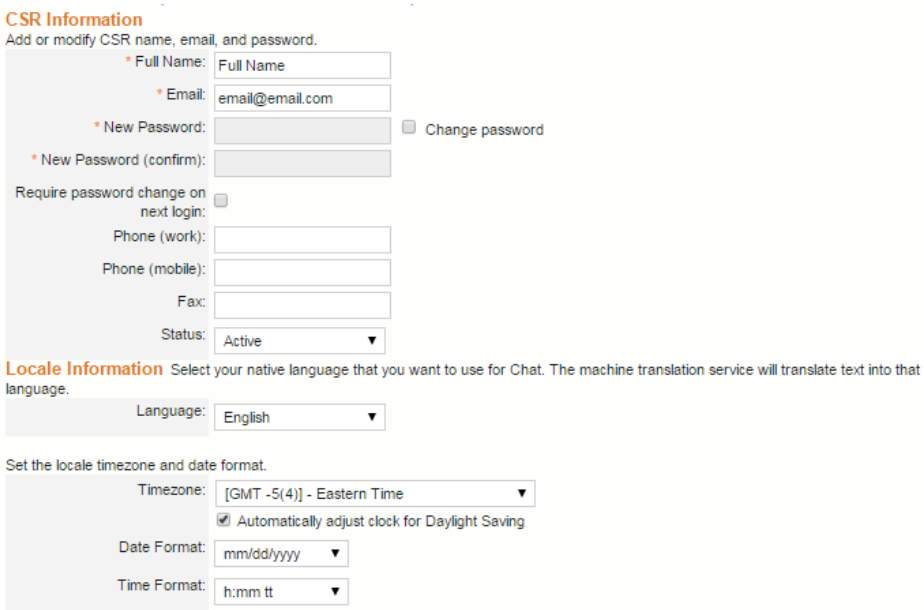


Figure 7: CSR Management

Department Management

The next step in the system setup is to configure the Department settings. A Parature Department allows for an organization to create a distinctive support desk presence and workflow while sharing accounts and customers with other Departments in the organization. While the Account and Customer modules are shared, the Ticket, Knowledgebase, Download, Email, Forum, and Survey modules are specific to a Department. Department benefits and limitations should be examined before implementing multiple departments. For the purpose of this white paper, we will focus on a single department service desk. Department setup consists of multiple configurations. The Department profile area contains general settings for the Department such as name, logo and locale settings.

Configure Department Management Settings

Department Business hours are configured to help manage communication with your customers. Time sensitive alerts and routing rules can be based on business hours. Alerts based on time elapsed will only consider time within business hours before alerts are sent if the alert is configured to use business hours. Holidays can also be tracked in the Department Business Hours.

Configure Department Business Hours

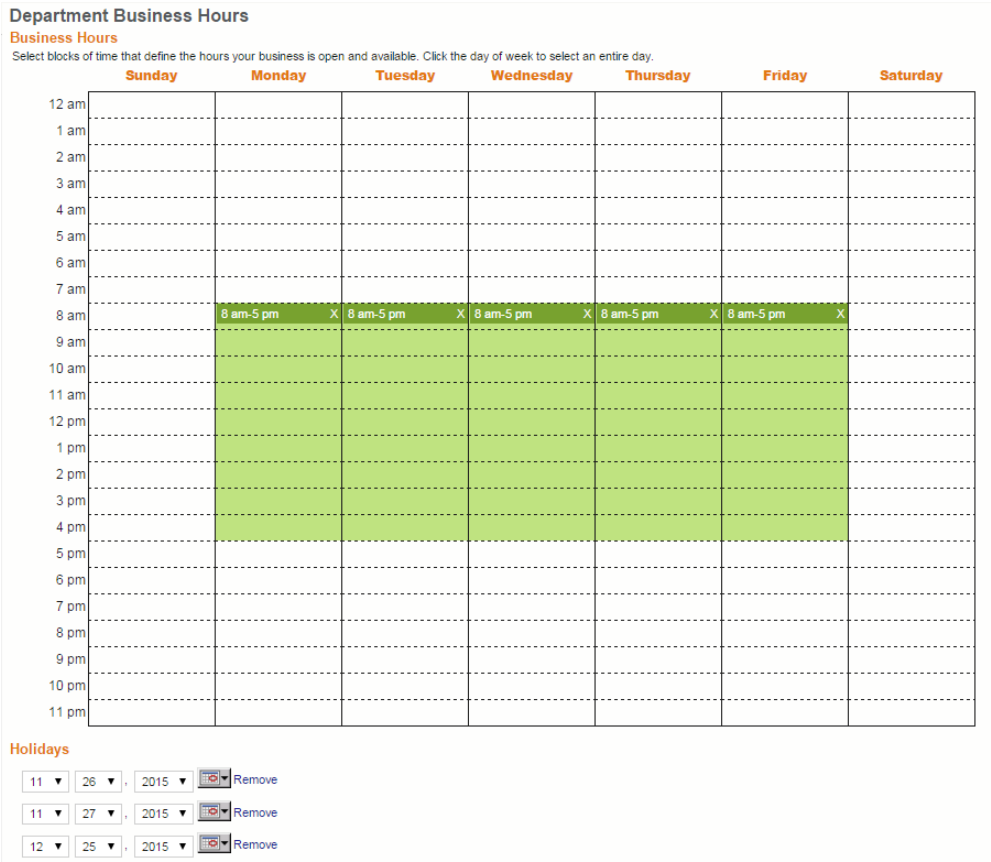


Figure 8: Department Business Hours Setup

The Email Settings area is used to configure outgoing mail settings. The user can define a default email for all emails generated by the system as well as an outgoing mail server. The user can choose to use their organization's mail server or can opt to use a Parature Provided Mail Server.

The Service Desk Tabs can be reordered in the Service Desk Tabs section. A New Service Desk Tab can also be added. The new tab can point to a URL, HTML, or a Report. The source of the Tab must be a valid URL starting with http, https, or ftp.

Service Desk Password complexity rules are managed in the Department Security Settings. To ensure system security, it is recommended to require a minimum length password of 8 characters including at least one alpha value, 1 numeric value, and 1 non-alphanumeric value. Password expiration and disabling password changes can also be configured in this area.

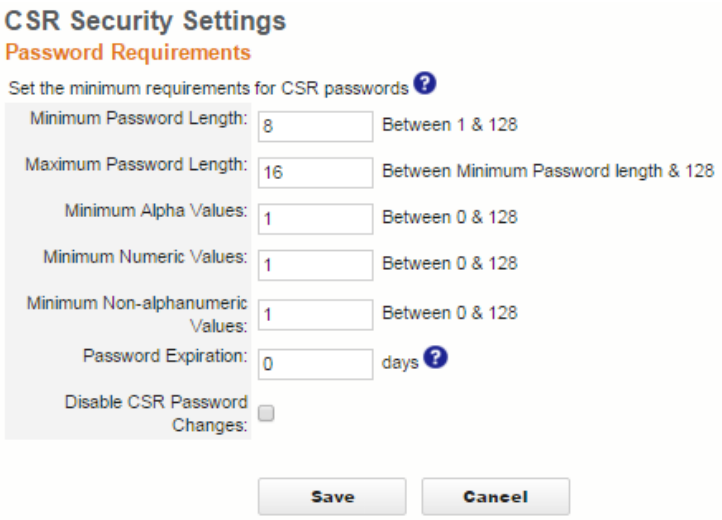


Figure 9: Password Complexity Rules

Single Sign-On End Points can be configured to integrate with the service desk. Single Sign-On setup requires a Parature Support Representative to configure some backend settings for your service desk implementation. You must contact your representative to complete the SSO End Point setup.

Single Sign On (SSO)

Cross-Origin Resource Sharing (CORs) settings can be applied to your service desk. Among other URLs, your Microsoft Customer Relationship Management (CRM) organization URL will be entered here to enable knowledge management through Parature from your CRM instance.

Lastly, the user can preview a department usage and total storage report as well as Export system data and set privacy settings. Privacy Settings can be linked to a current statement or customized for the service desk.

Step Four: Service Desk Configuration

Each module in the Parature Service Desk has its own configuration settings found in the Setup area of the Service Desk. CSR interaction with each module will depend on the settings defined in each area.

Ticket

General Settings

The ticket module includes extensive options for settings and configuration. The General Settings area allows the configuring user to define interactions with the ticket module including rules related to Service Level Agreements (SLAs), Ticket Create rules, Ticket Edit rules, and other Ticket management related rules.

Email Settings

Ticket Email Settings include configuring **Email to Ticket** conversion, editing **Email Templates** and defining settings for email **Attachments**. Email to Ticket conversion can be enabled and configured under Ticket Email Settings. The Email to Ticket conversion transforms incoming support emails into support tickets automatically. Content from the email is translated and mapped to existing ticket fields automatically. Navigate to the link below to review the Ticket conversion process.

Email to Ticket (E2T) Conversion

Ticket reply and create rules are also configured in the Email to Ticket area. The configuring user can specify how customer and CSR responses are handled by the conversion process.

Blocked Email Addresses can be added in the Email to Ticket configuration to prevent unwanted customers or potential email SPAM from creating a new ticket in your system.

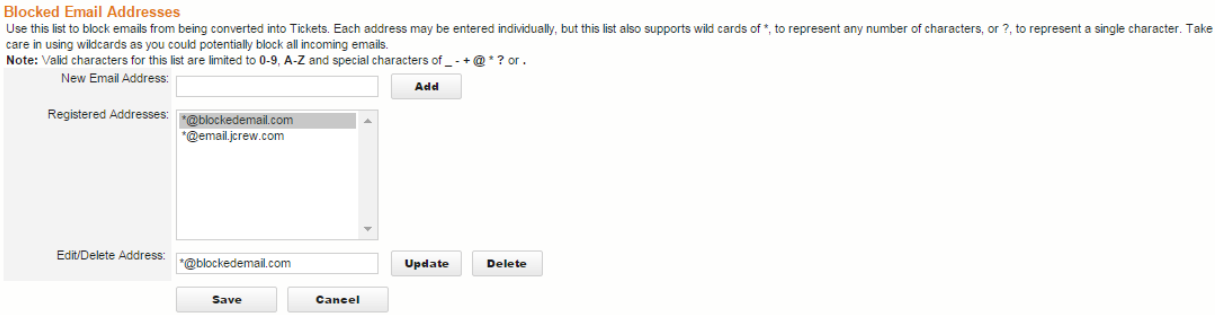


Figure 10: Blocked Email Addresses

Customer and CSR email templates are designed to provide flexibility in the email notification experience for each respective group. The configuring user can brand and style a customer email template to provide a website like experience for outgoing customer emails while the CSR template might include additional ticket detail or service desk links to provide ease of updating ticket information. Multiple email templates can be created to handle specific ticket actions performed by either the customer or the CSR.

Create and Manage Email Templates

Note: The configuring user needs to update both the Body (HTML) and Body (Plain Text) template fields to ensure the user receives the correct information depending on the type of mail they receive.

Fields

The Parature Ticket module provides standard out of the box fields to gather information from the customer or reporting user. New custom fields can be created to capture unique information from your customers and help tailor the ticket workflow to your business processes. Custom Ticket field settings include, value requirement, search availability, view visibility, and external vs internal use. Many field types require you to configure field options or default values. Navigate to the link below to review custom field management.

Custom Field Management

Note: Many out of the box fields do not allow the configuring user to update field settings. Some fields restrict access to update the fields required or search settings.

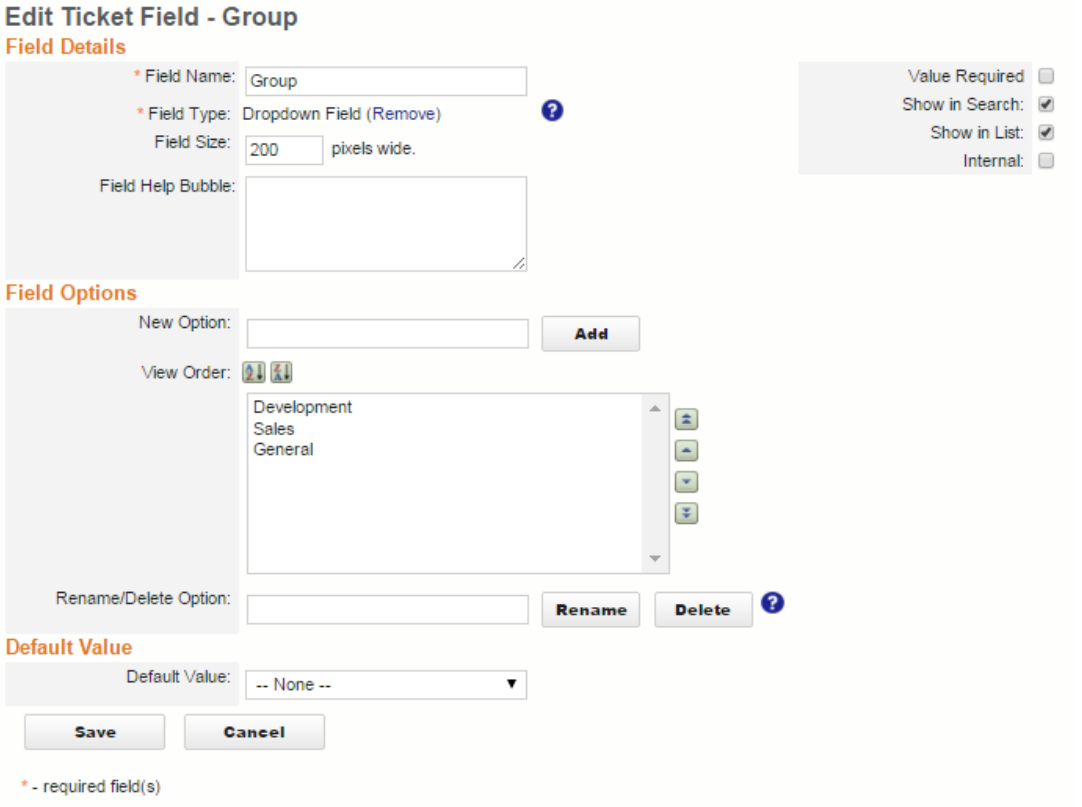


Figure 11: Custom Dropdown Field

Routing

To better meet the needs of your business process, Tickets can be routed to different **Queues** upon creation based on user defined criteria. Routing tickets to Queues helps manage CSR privileges to view and respond to tickets related to their expertise. Creating Ticket Queues is accompanied by also creating **New Ticket Rules** to route tickets to the Queue as Tickets get created

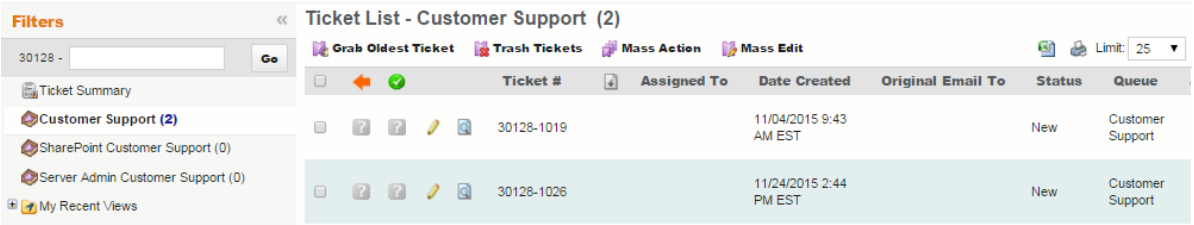


Figure 12: Custom Ticket Queues Visible in Ticket Module

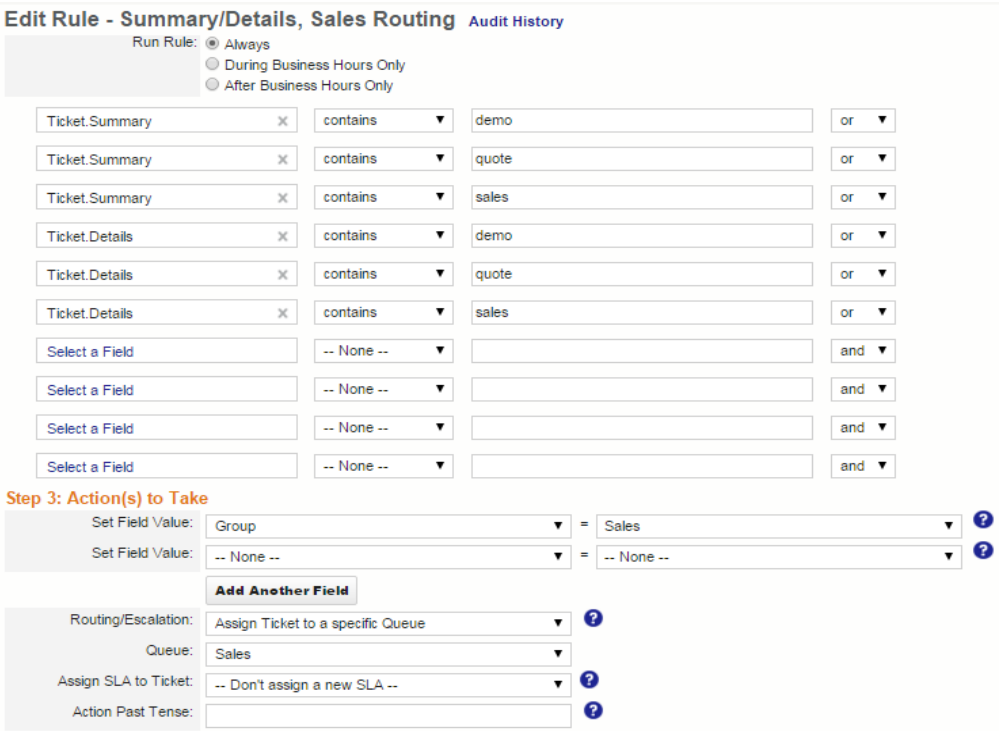


Figure 13: New Ticket Rule to Route Tickets to Sales Queue

Navigate to the links below to review Ticket Routing configuration and best practice advice.

Ticket Routing Best Practice

Manage Ticket Queues

New Ticket Routing Rules

Note: The order of your New Ticket Routing Rules matter. List your most specific routing rule at the top of the routing list to ensure the correct placement of tickets into Queues.

Alerts

The Ticket Module also contains three types of alerts, or emailing, mechanisms to be configured based on certain criteria. These Alerts include **New Ticket Alerts**, **Time Sensitive Alerts**, **and Action Email Alerts**.

The New Ticket Alert will inform CSRs listed in the recipients list when a new Ticket is created in the system. Time Sensitive Alerts can be created to run repetitively on a schedule, on a specific date, or once providing certain criteria. Time Sensitive Alerts allow the configuring user to set alert criteria, alert schedules, alert actions, and provide email notification to both the Customer and assigned CSR of the related Ticket.

The example below demonstrates a Time Sensitive Alert notifying the Customer that a CSR requested more information on their Ticket three days ago.

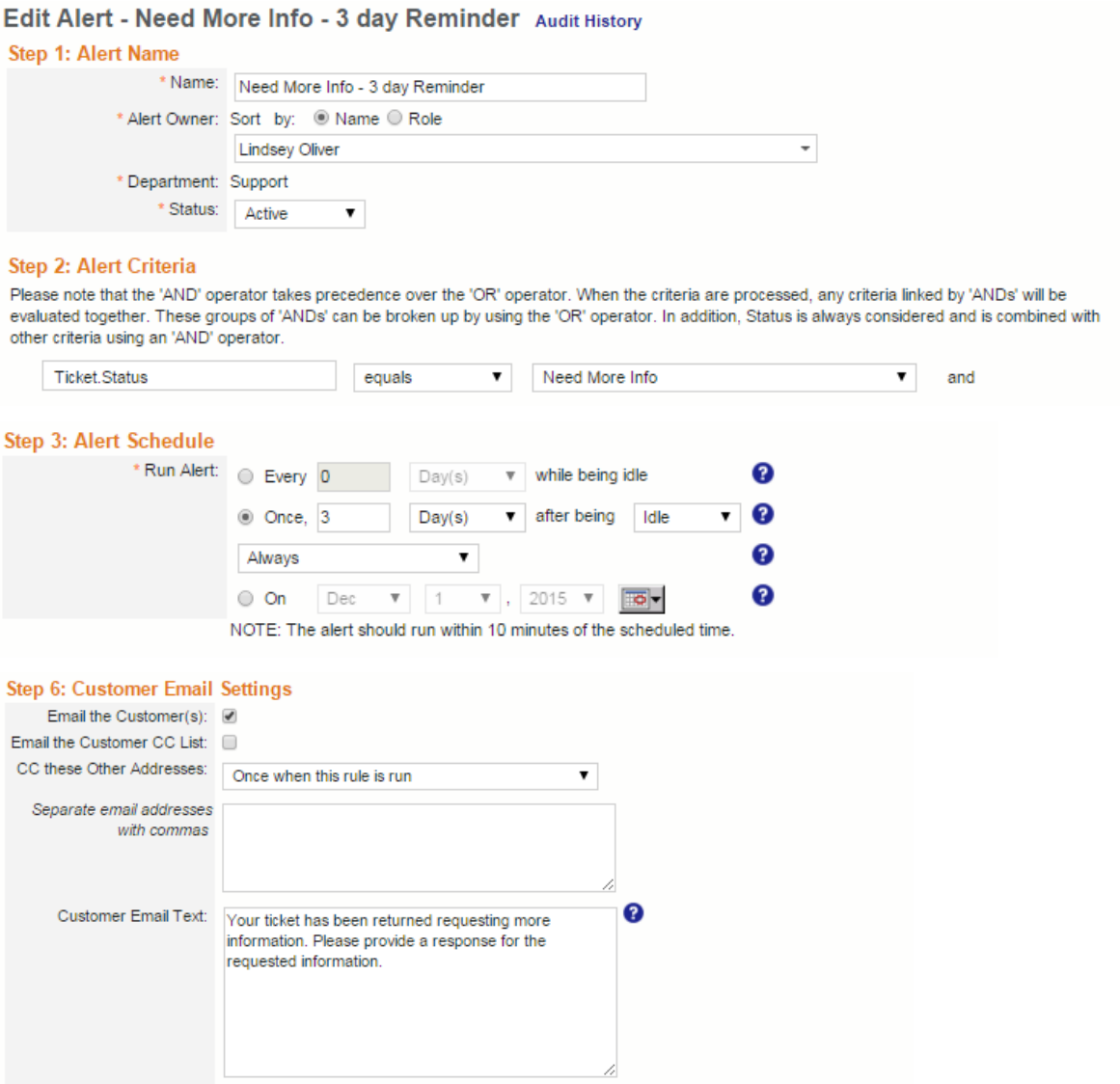


Figure 14: Time Sensitive Alert

Action Email Alerts are directly related to your Ticket Workflow. Actions are performed on Tickets to move them through the Ticket resolution workflow. Common actions include, assigning a ticket to a CSR, requesting information from the Customer, or solving a Ticket. Each action performed on a Ticket can produce an email to the Customer and/or the CSR.

Navigate to the link below to review creating Time Sensitive Alerts.

Create Time Sensitive Alerts

Workflow

The Ticket Workflow is a combination of **Ticket Statuses**, **Ticket Action**, and the transitions that occur when an action is taken on a Ticket. The Ticket Workflow can be tailored to fit your organization's unique support business rules by customizing Ticket Statuses, Actions, and transitions.

Ticket Statuses inform the Customer and CSR of the current state of the Ticket and where it is in the process towards remediation. Statuses such as, Assigned, Work in Progress, and Needs More Info, describe the current state of the Ticket to the Customer. Statuses are assigned a type depending on the stage of the Ticket workflow they fall under.

Ticket Actions are directly performed and accessed through the Ticket interface. Actions correlate to buttons found on the Ticket form. When an Action is performed, the Ticket will transition to a new status and show or hide new ticket actions and transitions. The Ticket Action editor allows the configuring user to create/edit Actions, add status transitions, and configure roles security for the Action. Like Statuses, Actions also have a type configuration which describes what will happen when the Action takes place. Some examples of Ticket Action types include, comment, copy, and assign to queue.

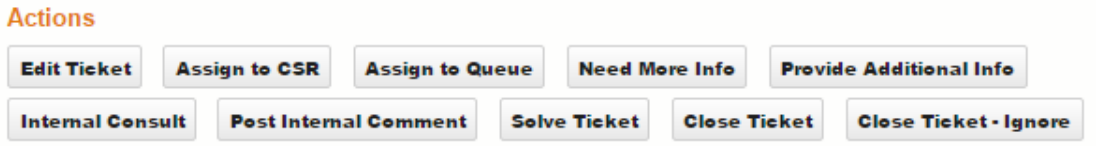


Figure 15: Ticket Actions

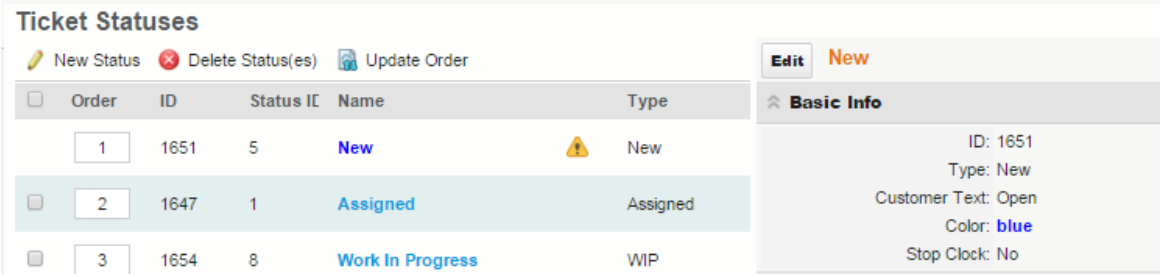


Figure 16: Ticket Statuses

Navigate to the link below for more information on managing the Ticket Workflow.

Manage Ticket Workflow

Navigate to the link below for more detailed information about the Ticket Module.

Ticket Module

Listed below are the remaining service desk modules and the functionality each provides:

Accounts Module

Add Notes
Associate contacts to accounts using Pass-Through Authentication
Associate customers to accounts
Associate products
Configure your customer profile notification settings
Create accounts
Create and send emails from the Account and Customer modules
Create customer profile
Create service desk widgets
Customize Customer & Account feedback data
Edit customer's role
Levels of account access for Customer role
Manage Service Level Agreements (SLAs)
Mass edit customers and accounts
Merge accounts
Portal activity widgets and metrics
Relate accounts
Security and Parature customer roles
Track Changes to Accounts & Contacts

Customer Module

Change the contact associated with a ticket
Configure your customer profile notification settings
Converting Customer Status
Create a list of all contacts sorted by the date of their last visit to your support portal
Create and send emails from the Account and Customer modules
Customer status
Customize Customer & Account feedback data
Mark customer as unregistered
Merge customers
New Contact Search
Portal activity widgets and metrics
Restore a deleted contact
Search for open or closed tickets by customer name
Share created Custom Account, Contact and Ticket views

Product & Asset Module

Product and Asset module
Change the order of product folders
Change the status of a product
Configure Product and Asset settings
Create Product catalog folders
Create, associate and manage products
Create, delete, and manage assets
Customize the columns to appear in the asset module
Default Product/Asset workflow
Track catalog, products, and unique assets
View account and customer product ownership

Knowledgebase Module

Add link to another Knowledgebase reference
Article Refer Report
Attach a file to a Knowledgebase article
Attach a file to a Knowledgebase reference
Change the color of hyperlinks in the body of Knowledgebase references
Change the permissions or SLA access for multiple Knowledgebase references
Comment on Knowledgebase references
Configure EasyAnswer settings
Configure Knowledgebase alerts
Configure Knowledgebase settings
Configure subscription message settings
Create alternate questions
Create and associate Knowledgebase articles
Create article translations
Delete a Knowledgebase article
Disable Knowledgebase ratings
Embed Parature video into a Knowledgebase reference
Enabling/disabling feedback for Knowledgebase references
Enhanced search for knowledgebase and download modules
Export Knowledgebase references
Filter support portal content with product associations
Link a glossary term to Knowledgebase article
Manage Knowledgebase subscriptions
Mass Associate Products to Knowledgebase References and Download Files
Move content folders in Knowledgebase or Download module
Move Knowledgebase References
Organize Knowledgebase and Download module content
Rename Knowledgebase and Download sections on the support portal
Submit a ticket directly to the Knowledgebase administrator

Download Module

Add a new download file
Batch upload files
Convert files to Parature video
Create an End-User License Agreement (EULA)
Create an external public link to your download file
Download an attachment from a ticket
Set up an FTP location as a download
Track when a Parature video is watched
Update images
View EULA Download Acceptance History
View the downloads history for a file

Chat Module

Chat statuses available for search and reports
Configure Chat deployments
Configure Live Chat settings
Configure the maximum number of chats that can be assigned to a CSR
Create Chat queues
Customize Chat feedback
Customize Chat module
Customize the look and feel of your Parature Live Chat
Setup multilingual chat support
Setup Proactive chat
Understand chat user roles

Social Monitor - providing customer service to your customers on social channels

Configure tagging criteria for Parature Social Monitor
Configure the Parature Facebook portal
Configure the Service Desk for Parature Social Monitor
Manage Social Channels, Tagging Criteria, and Reply As Accounts
Thread multiple social events to a single ticket
Using Social Monitor Filters
Using Social Monitor to interact with Social Events

Survey Module

Add a survey to your sample survey library
Associate a survey to a ticket
Change the text of the survey link
Copy a survey design, questions, or other options
Create and manage surveys
Create and re-distribute a survey
Delete responses to a survey
Export survey data

Step Five: Customer Support Portal Configuration

In the newly-published 2015 U.S. Multichannel Customer Service Report from Microsoft Dynamics CRM and Parature, from Microsoft, 92% of consumers surveyed said they now expect brands and organizations to offer a customer self-service support portal.

Having a public portal that is integrated with Parature is a key part of providing superior customer service to your clients. Parature provides the ability to develop public portals for customer access which can be integrated within your current public website.

Parature provides step by step guidance on developing a customer support portal that will match your corporate branding through the use of style sheets and make sure it is a responsive design. Areas include:

- Configuring the Portal Session Timeout
- Create a style sheet for mobile devices
- Notify customer on a particular action on service desk
- Portal Styling for Flexible Layout
- Provide external links to specific areas of your support portal
- View and download templates

Microsoft offers 4 tips to build a better customer support portal (taken from http://www.parature.com/4-support-portal-tips/):

1. Think Like Your Customers.

Design with your customer in mind. In Forrester's July 2015 brief for CIO professionals, Leverage Design Thinking to Spark a Customer-Obsessed Innovation Culture, VP and research director Frederic Giron and principal analyst Ryan Hart note that companies must "transform themselves from "inside-out" to "outside-in" organizations that shape innovation around the demands and expectations of their users — it's the only way forward in the age of the customer."

But this doesn't mean that the benefit is all one-sided. Their same research notes that the best customer-focused and -facing innovation is derived at the intersection of "technological feasibility, customer desirability and business viability." where the product or service benefits all sides. In the case of self-service, a portal designed with customer ease and desirability in mind would deliver greater customer satisfaction and retention, as well cost savings through reduced volume to higher-cost, higher-touch service channels such as phone and email.

(Read how nTelos Wireles achieved both customer and business benefits with their self-service portal implementation.)

2. Better Yet, Ask Your Customers.

While it's terrific to think like your customer when developing or redeveloping your self-service portal, it's even better to ask them directly. Select customers to be part of your ideas and testing team, and be sure to add feedback and survey tools to your finished product (or perhaps better said, your self-service portal in continuous progress).
2.Think you don't have time to get customers involved, or you would like to but you have an internal project deadline that's looming? The John Wooden quote is a proper share in this case: "If you don't have the time to do it right now, when will you have the time to do it over?" Or consider this: Gartner Research estimates that by the end of 2016, at least 80% of organizations that fail to plan their self-service implementations will incur higher customer service costs and will not achieve the savings and benefits expected. Small customer desires or requests – which can include anything from not having to log in for self-service support access, adding an alert bar for ease in finding information on trending issues or support statuses, or suggestions for content and link placement – can have an immediate and lasting impact on adoption and continued use.

For instance, in our 2015 State of Multichannel Customer Service Report survey, 61% said they have a more favorable view of a brand or organization that offers a mobile-responsive self-service portal.

3. Organize, Personalize, Prioritize.

For customers wanting to use self-service more often, there's nothing that will turn them away faster than thousands of pages of disorganized hyperlinks and information. Ask.com is an example of a brand that has created an organized, convenient and inviting self-service support offering, transparently putting the answers to its most frequently asked questions front and center, along with the name and friendly face of the person that's helping to provide the answers at Ask. And while Ask also offers support ticketing on its portal, the word ticket has consciously been removed to support a more personalized experience, as Ask wants to make sure that no customer or user ever feels like a number when contacting support.

Ask is also a prime example of a brand that is never content with its knowledgebase content, keeping it updated and adding to on a frequent basis based on its article rating and feedback tools, as well as page views and keyword searches. In addition, by regularly adding content, search engine placement increases. According to the State of Multichannel Customer Service Report referenced above, 75% of consumers have used a search engine to try and find the answer to their customer service question.

(Read how Ask.com has increased self-service usage, reduced assisted support response times and saved an estimated $3 million through self-service.)

4. Don't Make Your Portal an Island.

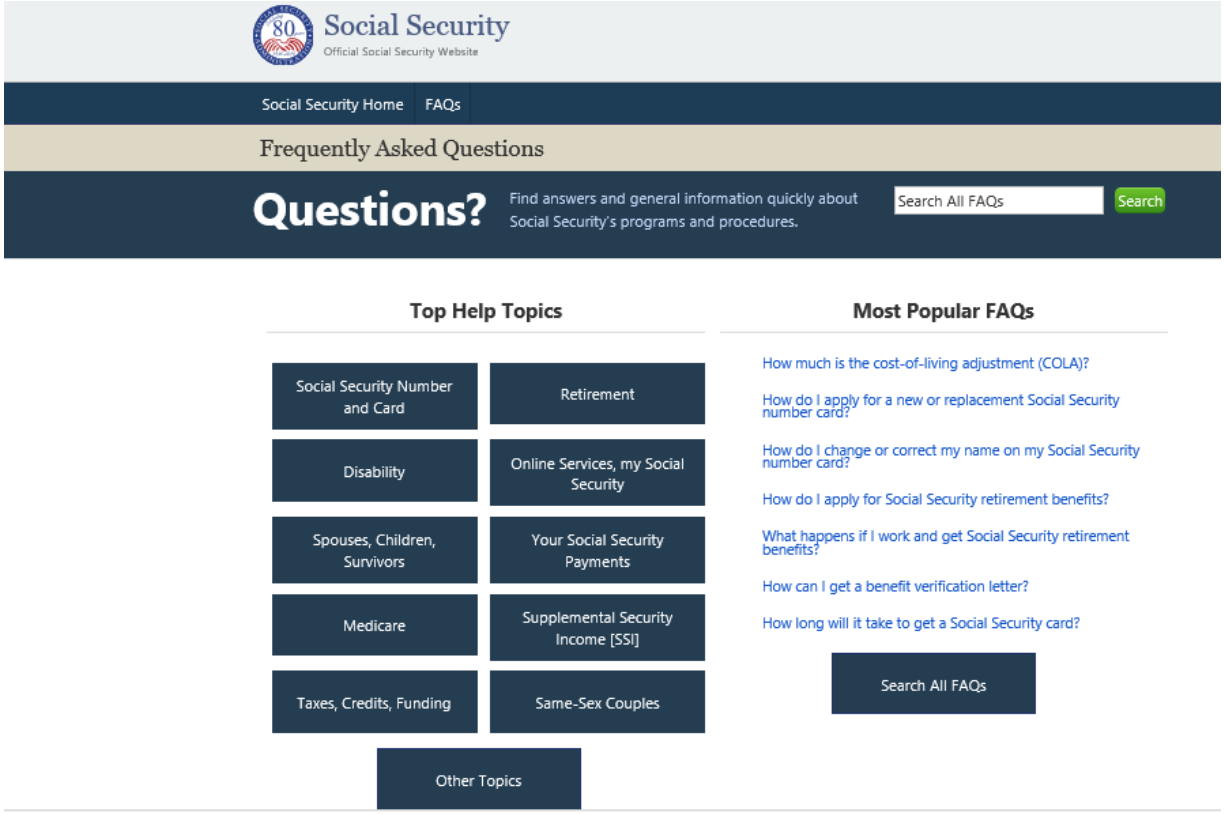
In addition to the knowledgebase, a brand or organization's web self-service offering should also include several assisted service options to include support ticketing, email, your organization's customer service phone number and/or live chat. Don't design your self-service portal as an island, but as a bridge.

In addition, your self-service offering should be just as predominantly displayed and promoted as your customer service phone number or email. Address frequently asked questions in your social media streams; provide a link to your self-service offering in every email signature. Share the web address as part of your brand's IVR messaging. These are just a few of the ways you can promote self-service use and adoption.

Incorporating self-service allows brands to provide current and consistent answers, across channels, at scale. Not only does an effective self-service offering deliver customer convenience, but it also benefits brands through deflection of frequently asked questions, lowered costs and giving customer service representatives more time to spend on assisted service.

Design with the customer in mind to achieve greater self-service satisfaction.

Below is a good example of a customer support portal using Parature:



About Information Strategies

Since 1987, Information Strategies (InfoStrat) has been delivering IT solutions to government and business customers, focusing on portals, customer relationship management, and custom database applications and integration. We were named Microsoft Federal Partner of the Year in recognition of our work with the U.S. government and are winners of numerous Microsoft Partner Awards. InfoStrat has completed over 1000 technology projects.

Together, we have over 60 publications to our credit, including the most recent book *Building Portals, Intranets, and Corporate Web Sites with Microsoft Servers* (Addison Wesley, 2004). This book was the first to address the entire Microsoft portal platform, and contains valuable information not only for software developers but also for chief information officers and other technology managers. InfoStrat helped develop one of the largest portals used by the U.S. federal government, www.employeeexpress.gov, hosted by the Office of Personnel Management. The portal has over one million users from dozens of civilian federal agencies.

Information Strategies line of business solutions built on Microsoft Dynamics CRM and SharePoint include:

- Grants Management
- Constituent Management
- Code Enforcement
- Case Management
- Association Management

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