CCW
CONFERENCE & EXPO

June 26-30, 2017
The Mirage, Las Vegas

Epicor Software – Redefining the Fundamentals of Customer Service

Ian Ashby

Senior Vice President, Global Support

Epicor Software Corp.

Agenda

- Epicor Overview/Introduction
- Context
- The Case for Change: EpicCare
- Critical Choices and Decisions
- Implementation Waves and Timelines
- System and Process Specifics
- Business Results
- What’s Next ?

Epicor At a Glance

EPICOR

grow business not software™

~20,000 customers

3,800 employees

150 countries

70+ products

~$1 billion revenue

Complete Value Chain Solutions – B2B & B2C
The 6th Largest ERP Software Provider Globally

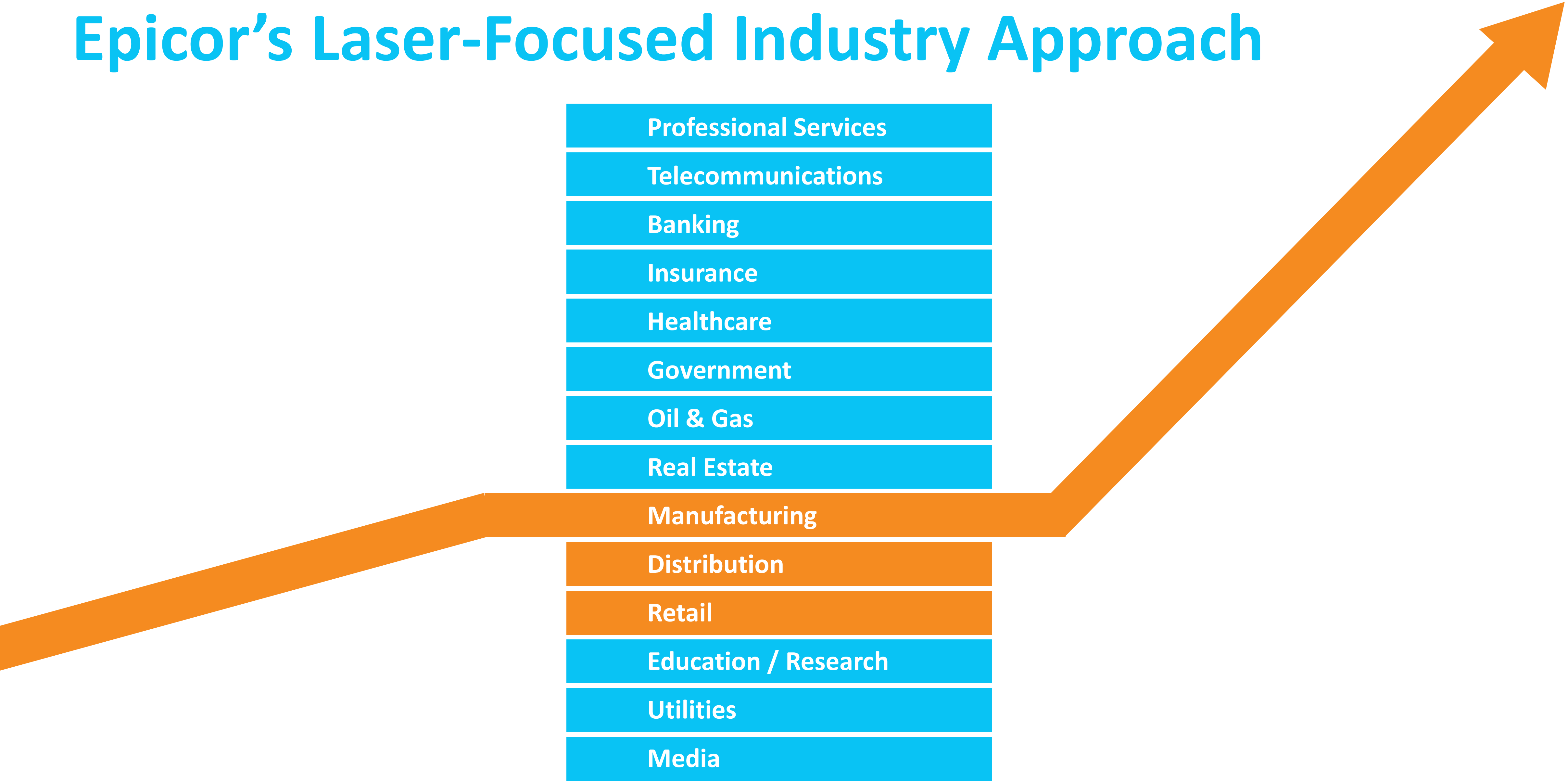
Our Customers

Lehigh Hanson HEIDELBERGCEMENT Group
Standex
APPLIED Industrial Technologies
Rexel ELECTRICAL & DATACOM SUPPLIES
MANUFACTURING Institute
sonepar usa
HYATT
Energizer
DXP
tyler technologies
True Value
AQUARIUM OF THE PACIFIC
MS National Multiple Sclerosis Society
K2
HEIDELBERG
REV-A-SHELF
United Electric Supply
CHICAGO BULLS
ACE
Affinity Federal Credit Union
JELD-WEN WINDOWS & DOORS
BLACKHAWK INDUSTRIAL
HAJOCA
SOURCE ATLANTIC
METASTORM
Petitti Garden Centers
HEIDENHAIN
AGIE CHARMILLES
Leggett & Platt INCORPORATED
Zippo
Despatch INDUSTRIES

Industry Recognized Solutions

FORRESTER
Gartner
NUCLEUS RESEARCH
TEC Technology Evaluation Centers
INNOVATIONSPREIS-IT BEST OF 2014 initiative mittelstand BRANCHENSOFTWARE
Info Security Products Guide 2015 GLOBAL EXCELLENCE AWARDS
ROI AWARDS 2015
HARDWARE ALL STARS 2015 SPONSORED BY EPICOR
CRN Channel CHIEFS 2015
NETWORK PRODUCTS GUIDE IT World Awards 2015 FINALIST
BEST OVERALL VALUE VENDOR LANDSCAPE AWARD INFO~TECH
100 SupplyDemandChain 2016
15th Annual PROS 2015 to KNOW SupplyDemandChain
2016 GOLD STEVIE WINNER
CIO 100 HONOREE 2013
INDUSTRIE PREIS 2014 BEST OF

Epicor’s Laser-Focused Industry Approach



- Professional Services
- Telecommunications
- Banking
- Insurance
- Healthcare
- Government
- Oil & Gas
- Real Estate
- Manufacturing
- Distribution
- Retail
- Education / Research
- Utilities
- Media

Industry Focus Example: US Distribution

60% of Industrial Distribution’s Big 50

56% of Electrical Wholesaling’s Top 200

49% of Supply House Times’ Premier 150

39% of The Wholesaler’s Top 100

…. using Epicor ERP software solutions

Electrical Wholesaling
THE TOP 200
THE WHOLESALER
Our 37th Annual Wholesaling 100
SUPPLY HOUSE TIMES
2009 PREMIER 150
WEIGHING OPTIONS
Industrial Distribution
50
ID's annual list of the largest industrial distributors

Why Epicor ?

Flexibility informed by best practices

Flexible solutions backed by a team that knows industry best practices

Continuous innovation

Visionary solutions delivered to provide business benefit

Deep industry knowledge and vertical expertise

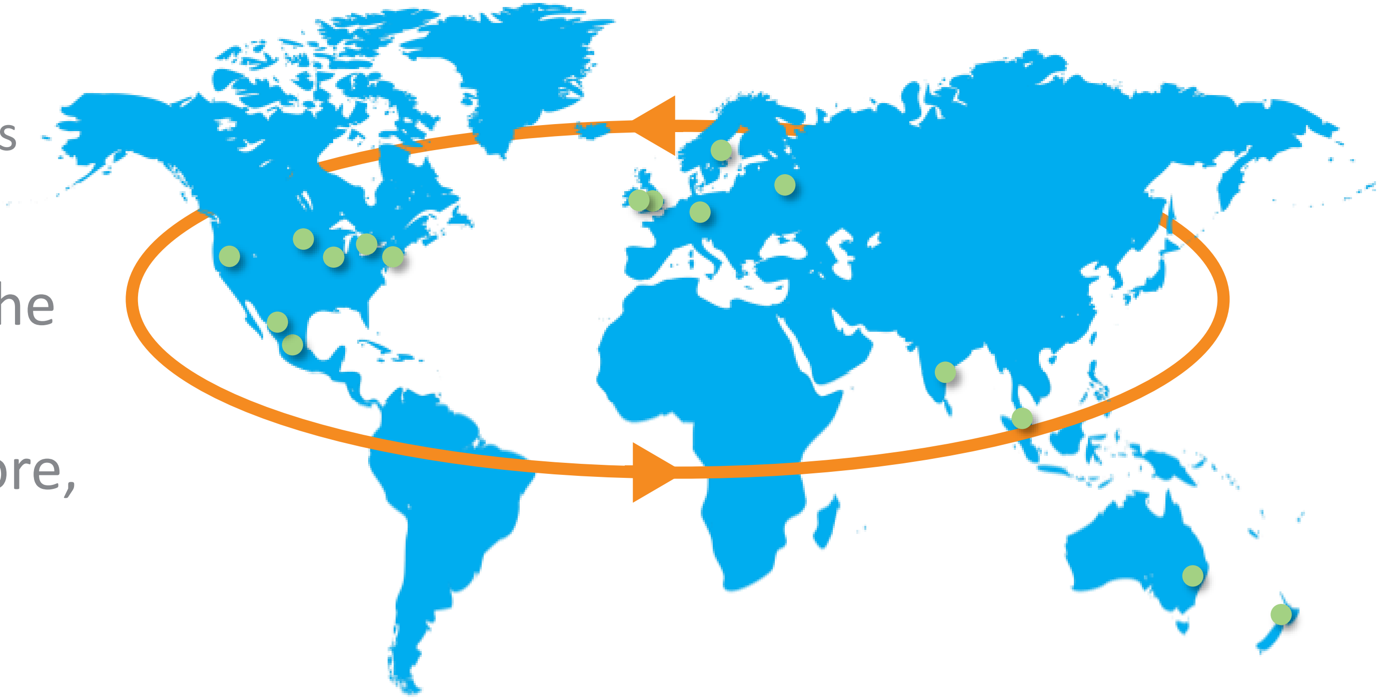
Solutions and services designed by a team with deep knowledge of your industry

Customer-obsessed service and support

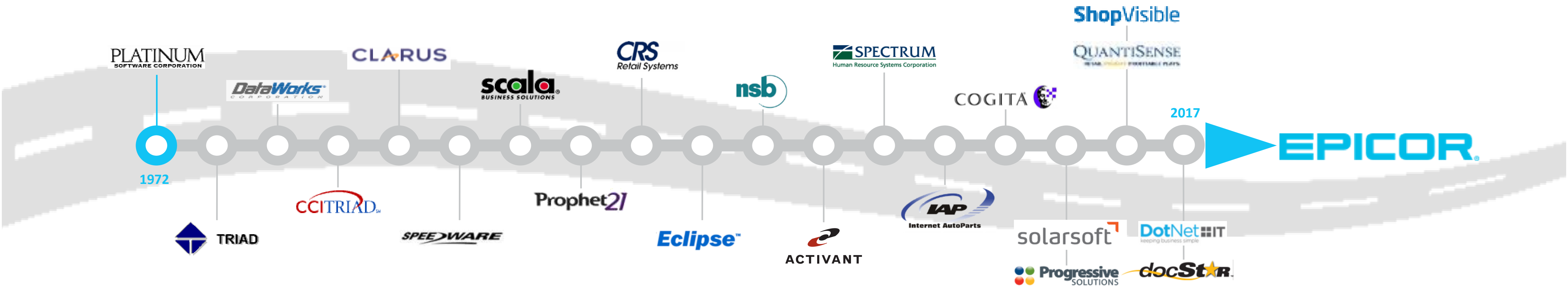
Customer-first philosophy across the business – from solution delivery through implementation and support

Epicor Support Overview

- Support for **Epicor SW, technology, and third-party SW products**
  - Support & maintenance fees are approximately 50% of company revenues
- **16 main support centers**
  - From New Zealand to Europe to the Americas….
  - Newest support center in Bangalore, India (the ITC)
- Providing support in **21 languages**
- Handling c. **500,000 support contacts p.a.**
- **Phone, portal and e-mail**
- Supporting **Customers** and **Partners**



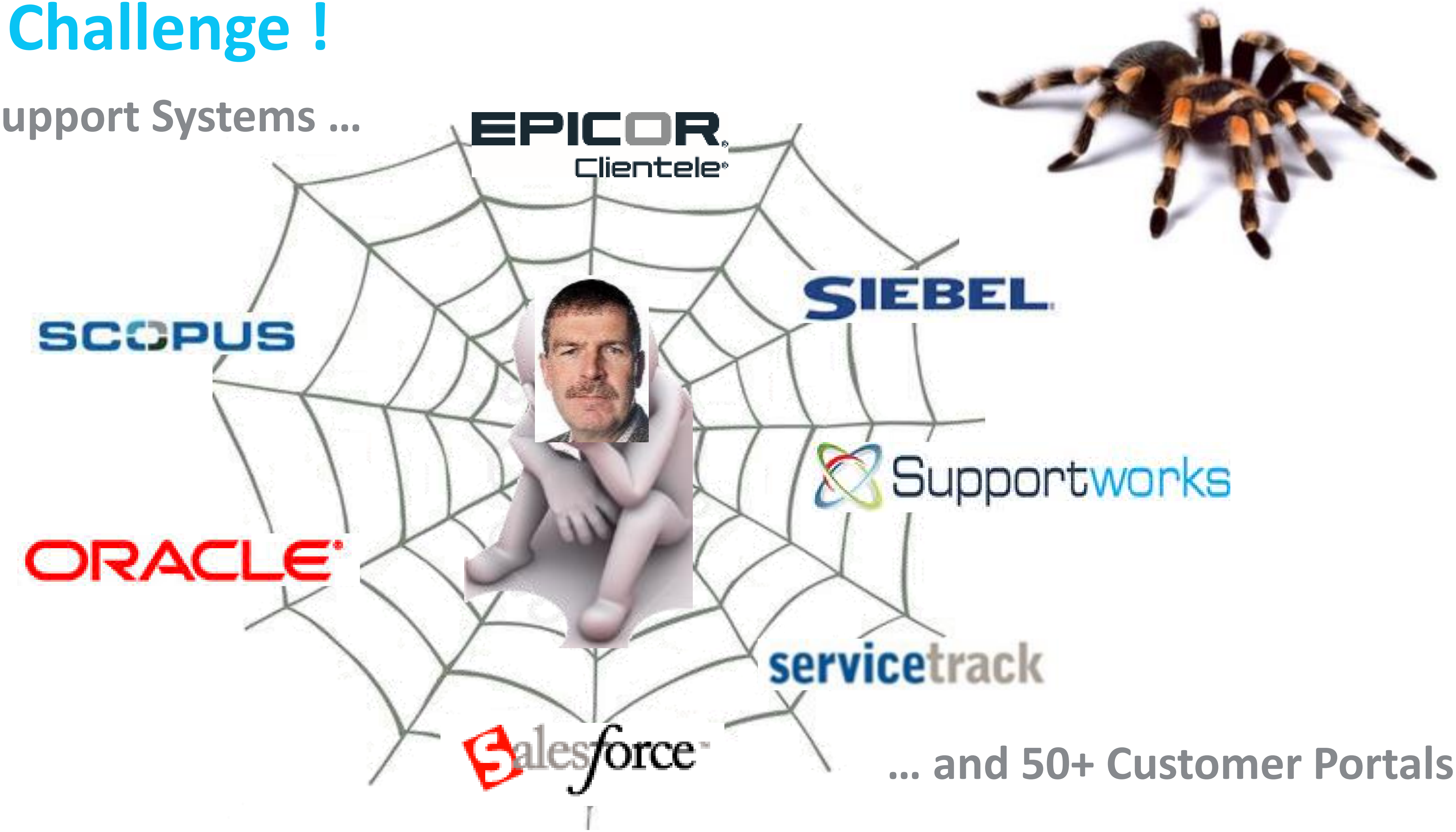
Epicor’s Evolution


PLATINUM SOFTWARE CORPORATION
1972
TRIAD
DataWorks CORPORATION
CCITRIAD
CLARUS
SPEEDWARE
scala BUSINESS SOLUTIONS
Prophet21
CRS Retail Systems
Eclipse
nsb
ACTIVANT
SPECTRUM Human Resource Systems Corporation
IAP Internet AutoParts
COGITA
solarsoft
Progressive SOLUTIONS
ShopVisible
QUANTISENSE
2017
DotNetIT keeping business simple
docStar
EPICOR

- Multiple acquisitions, mergers and shareholder changes over 40+ years
- Complexity and Systems proliferation, especially in support operations

The Challenge !

15+ Support Systems …


EPICOR
Clientele
SIEBEL
SCOPUS
Supportworks
ORACLE
servicetrack
salesforce

… and 50+ Customer Portals!

EpicCare
Customers for life

The Case for Change: EpicCare

Epicor’s Decision Process

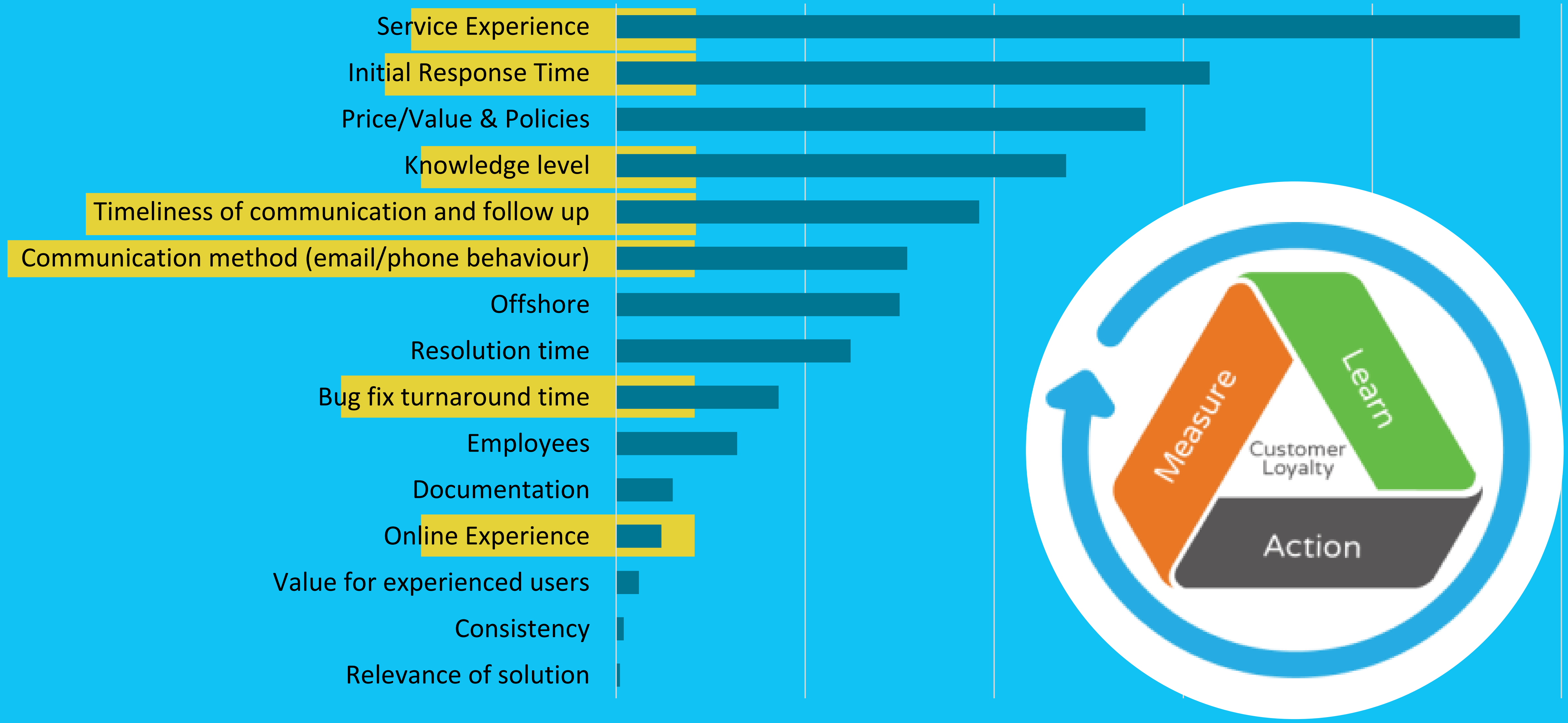
Drivers to Undertake Transformation

Critical Decision: CRM vs. CSM

Vendor Selection

Implementer Selection

Support Transformation – Driven From Customer Feedback



Drivers for The EpicCare Program

↑ Customer Satisfaction

- Ability to Anticipate Customer Service Requirements
- Improved Responsiveness to Customer Calls & Service Delivery
- Making it Easier to Do Business
- Improved NPS

Reduced Service Costs

- Complete Charge Capture of Service Delivery
- Improved Technician Productivity
- Reduced Time in the “Service-to-Cash” Cycle

Streamlined Workflow

- Improved Processes & Technologies
- Automating Manual Processes Where Appropriate
- Separation of Case and Service Request (pre-defined workflows)

Improved Service Levels

- Vastly improved analytics and service controls
- Standardized Operating Model
- Ability to Deliver Consistent Service (Globally)

Enhanced Quality & Growth

- Modularity for Supporting Growth
- Improve Quality and Reduced Costs
- Maximized Cross-selling and Up-selling opportunities
- Ability to leverage services as a Competitive Advantage

CRM
SUPPORT
SERVICE
ORDERS
ANALYSIS
MARKETING
STRATEGY
SALES

CRM

Our Critical Choice

Customer Service Management

- **Customer relationship management** (**CRM**) is a system for managing a company's interactions with current and future customers.
- It often involves using technology to organize, automate and **synchronize sales, marketing, customer service, and technical support.**
- Today's CRM software is highly scalable and customizable, allowing businesses to gain **actionable customer insights** with a back-end analytical engine, view **business opportunities** with predictive analytics, streamline operations and **personalize customer service** based on the customer's known history and prior interactions.

- ITIL is the process of aligning enterprise IT services with business and a primary focus on the delivery of **best services** to end user (customer)
- ITIL focuses on delivering services such that that the end-user **experiences the most desired result**
- **Focus is on standardizing**
- Measures the **operational efficiency** in meeting service level expectations
- ITIL is a **comprehensive suite of best practices**

… BUT with an External Focus!!

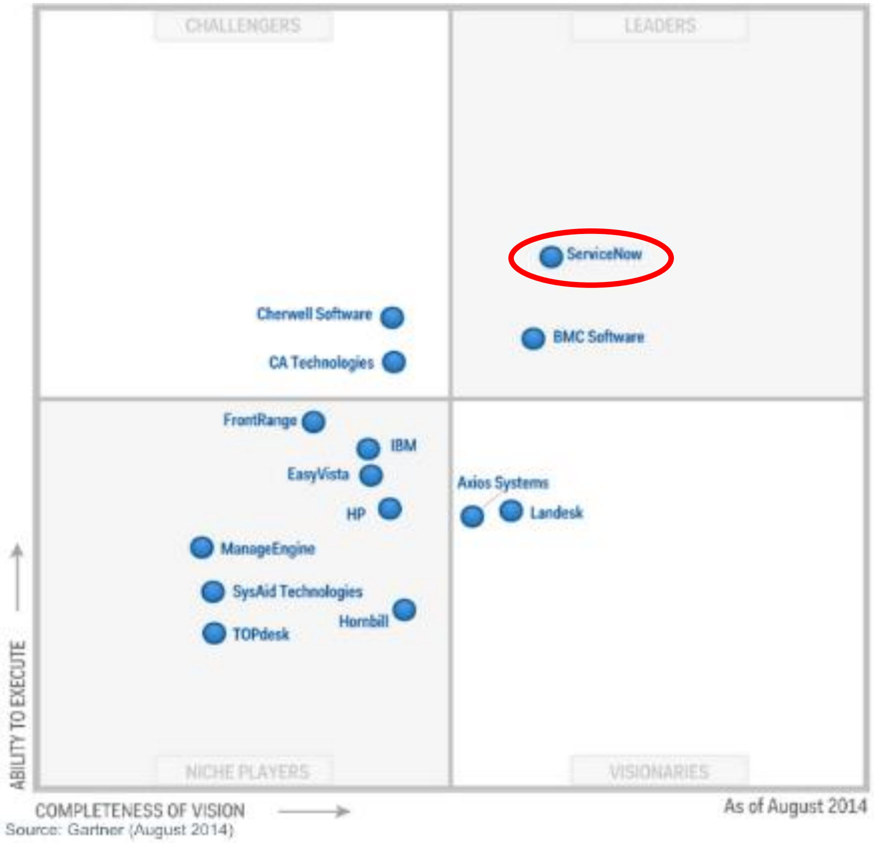
Epicor’s Decisions

Drivers to Undertake Transformation	Improve Customer Satisfaction
Critical Decision: CRM vs. CSM	CSM: Customer Service Management
Vendor Selection	servicenow
Implementer Selection	COVESTIC

A Few Words About servicenow

- A fast-growing, global company
  - Revenues of c.US$1.4bn p.a.
  - 4,800 employees
- 100% cloud-based solution delivery
- Leader in ITSM solutions for internal IT
- Emerging leadership in CSM

Gartner Magic Quadrant for ITSM Tools

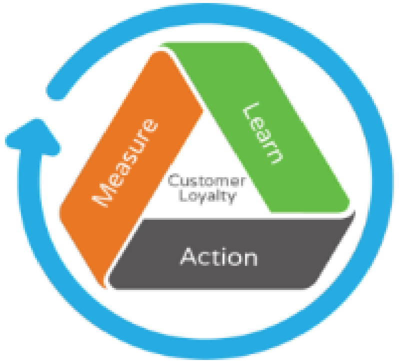


Source: Gartner (August 2014)

Our Approach

- To *partner* with ServiceNOW to deliver the EpicCare platform
- Initial focus on **system implementation** and the **global roll-out**
  - With the minimum of true ‘customizations’
- Then move into a ***‘Continuous Improvement’*** phase
  - Delivering service improvements to Customers & Partners
  - Improving the user experience and efficiency for our Support Analysts

EpicCare
Customers for life

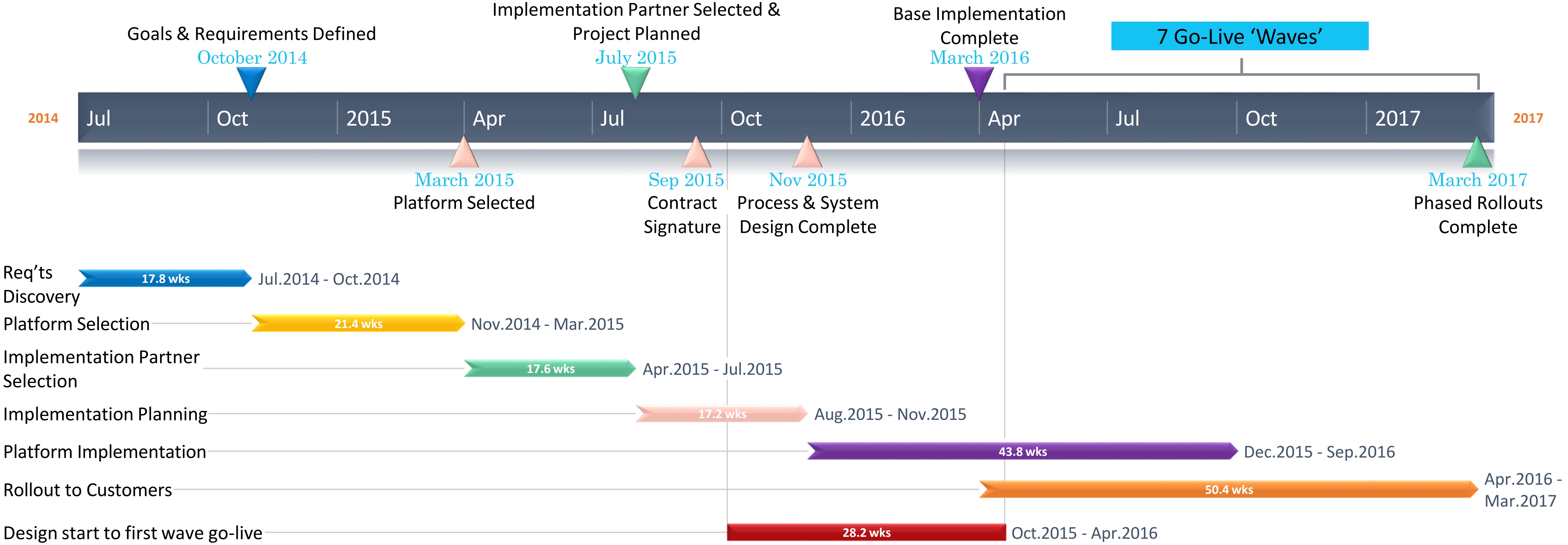


How We Have Positioned EpicCare

- *Transformational* project focused on improving the overall customer experience
- Major investment, driven from customer feedback
- Combination of *systems* and *processes*
  - **A single support system** across all products, for all customers & partners, all geographies, based upon the ServiceNOW CSM platform
  - **Consistent support processes**, leveraging best-in-class ITIL/ITSM practices, driven by Command Center team
- Move to Knowledge-Centric Support (KCS)
- Continuous improvement focus
- A ‘proper’ Change Management program – internal and external

EpicCare Implementation Timeline

EpicCare
Customers for life



Req'ts Discovery	17.8 wks	Jul.2014 - Oct.2014
Platform Selection	21.4 wks	Nov.2014 - Mar.2015
Implementation Partner Selection	17.6 wks	Apr.2015 - Jul.2015
Implementation Planning	17.2 wks	Aug.2015 - Nov.2015
Platform Implementation	43.8 wks	Dec.2015 - Sep.2016
Rollout to Customers	50.4 wks	Apr.2016 - Mar.2017
Design start to first wave go-live	28.2 wks	Oct.2015 - Apr.2016

EpicCare Rollout – What We Achieved

EpicCare Rollout now complete:

Seven Waves replacing
15+ existing support systems

All products,
all customers, globally,
now live

We achieved our stretch target !

Wave	Primary Products	Go-Live Date
Wave 1	Eclipse	April 2016
Wave 2	Distribution	June 2016
Wave 3	Prophet 21, Eagle	August 2016
Wave 4	Auto, iSolutions, Enterprise	November 2016
Wave 5	Epicor ERP	December 2016
Wave 6	iScala, BisTrack US	January 2017
Wave 7	Tropos, BisTrack UK, CMS	March 2017

EpicCare Major Changes

EpicCare
Customers for life

Customer Management

- **Entitlement:** Faster, Embedded Customer Attributes (Icons), Caller ID
- **Dashboards**: Account Summary, Queues, Metrics
- **Designed to Measure**: SLAs, SLTs, KPIs
- **Survey** Mgmt
- Enhanced **Portal**, Self-Help

Business Data

- **Customer Data Integrated** with Epicor Business Systems
- **Support Managed Data** maintained in EpicCare: Contacts, Entitlements, Asset Details, …
- **Customer Configuration Management**

Case Handling

- **Customer Need**: Case, Problem (Defect), Service Request
- **Knowledge** usage embedded in Case, breadcrumbs
- **Process Integrated** with Non-support Stakeholders
- **Positive Call Closure**

Workflows

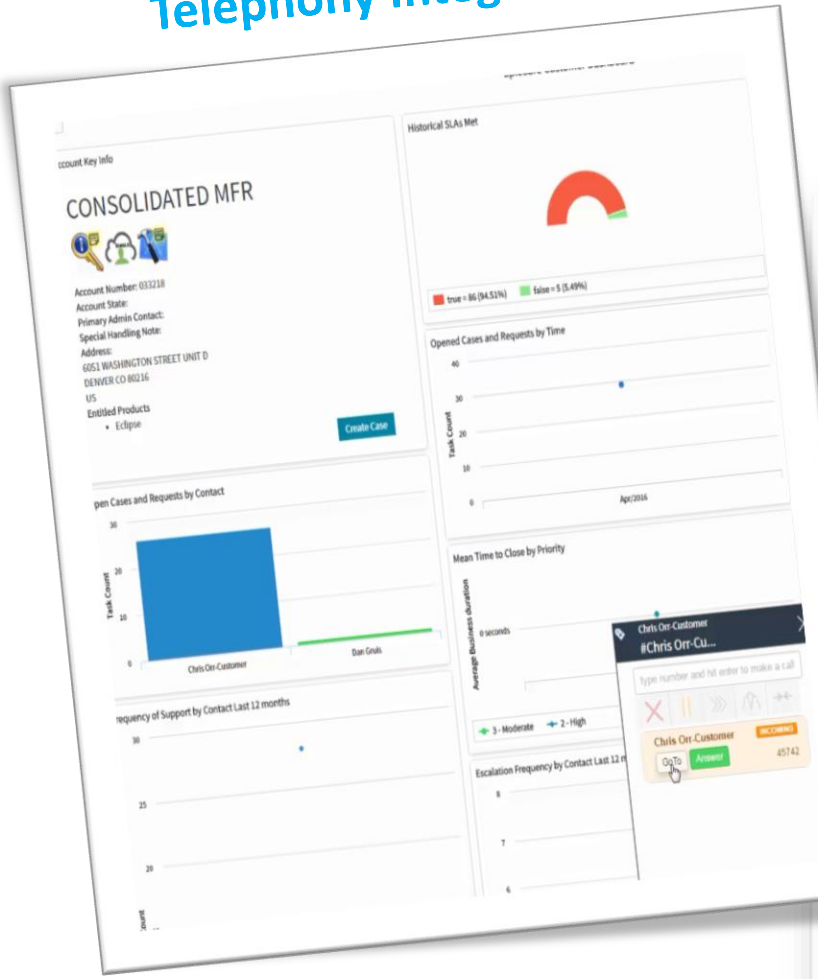
- **Service Catalog** for commonly requested services
- **Email Hub** Receiving, Sending, Notifications
- **Appointment** scheduling
- **Time Management**: Tracking, Billing, Normalization

Other Capabilities

- **Common Reporting** and Metrics to drive CSIP
- **Single, Global System** driving Service consistency
- **Single Sign-on** for Agents
- **Collaboration capabilities** including chat, concurrent updates

EpicCare: Transforming Epicor Customer Support

Telephony Integration



ccount Key Info

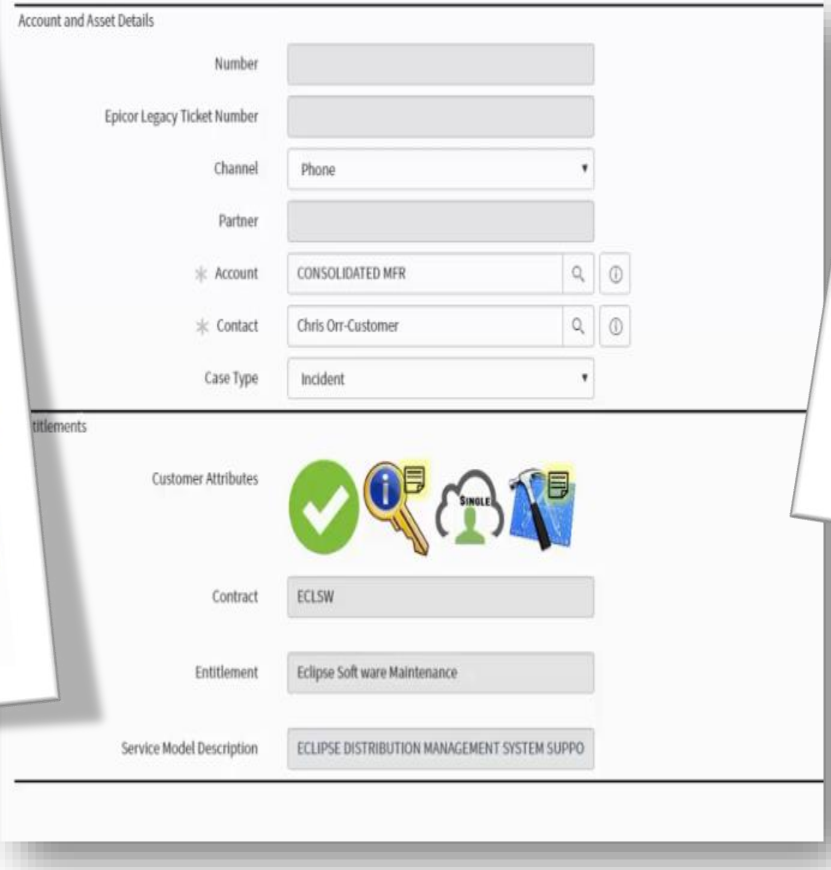
CONSOLIDATED MFR

Account Number: 033218
Account State:
Primary Admin Contact:
Special Handling Note:
Address:
6051 WASHINGTON STREET UNIT D
DENVER CO 80216
US
Entitled Products
- Eclipse

Chris Orr-Customer
#Chris Orr-Cu...
type number and hit enter to make a call
Chris Orr-Customer INCOMING 45742

Create Case
pen Cases and Requests by Contact
Task Count
30
20
10
0
Chris Orr-Customer
Dan Gruls
requency of Support by Contact Last 12 months
30
25
20
Historical SLAs Met
true = 86 (94.51%)
false = 5 (5.49%)
Opened Cases and Requests by Time
40
30
20
10
0
Task Count
Apr/2016
Mean Time to Close by Priority
Average Business duration
0 seconds
3 - Moderate
2 - High
Escalation Frequency by Contact Last 12 m
8
7
6
GoTo
Answer

Knowing Our Customer



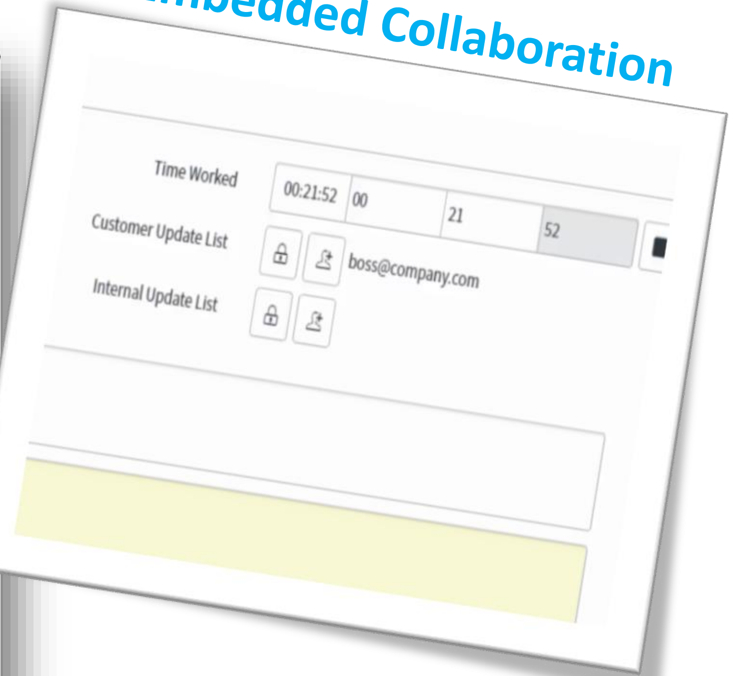
Account and Asset Details

Number	
Epicor Legacy Ticket Number	
Channel	Phone
Partner	
* Account	CONSOLIDATED MFR
* Contact	Chris Orr-Customer
Case Type	Incident

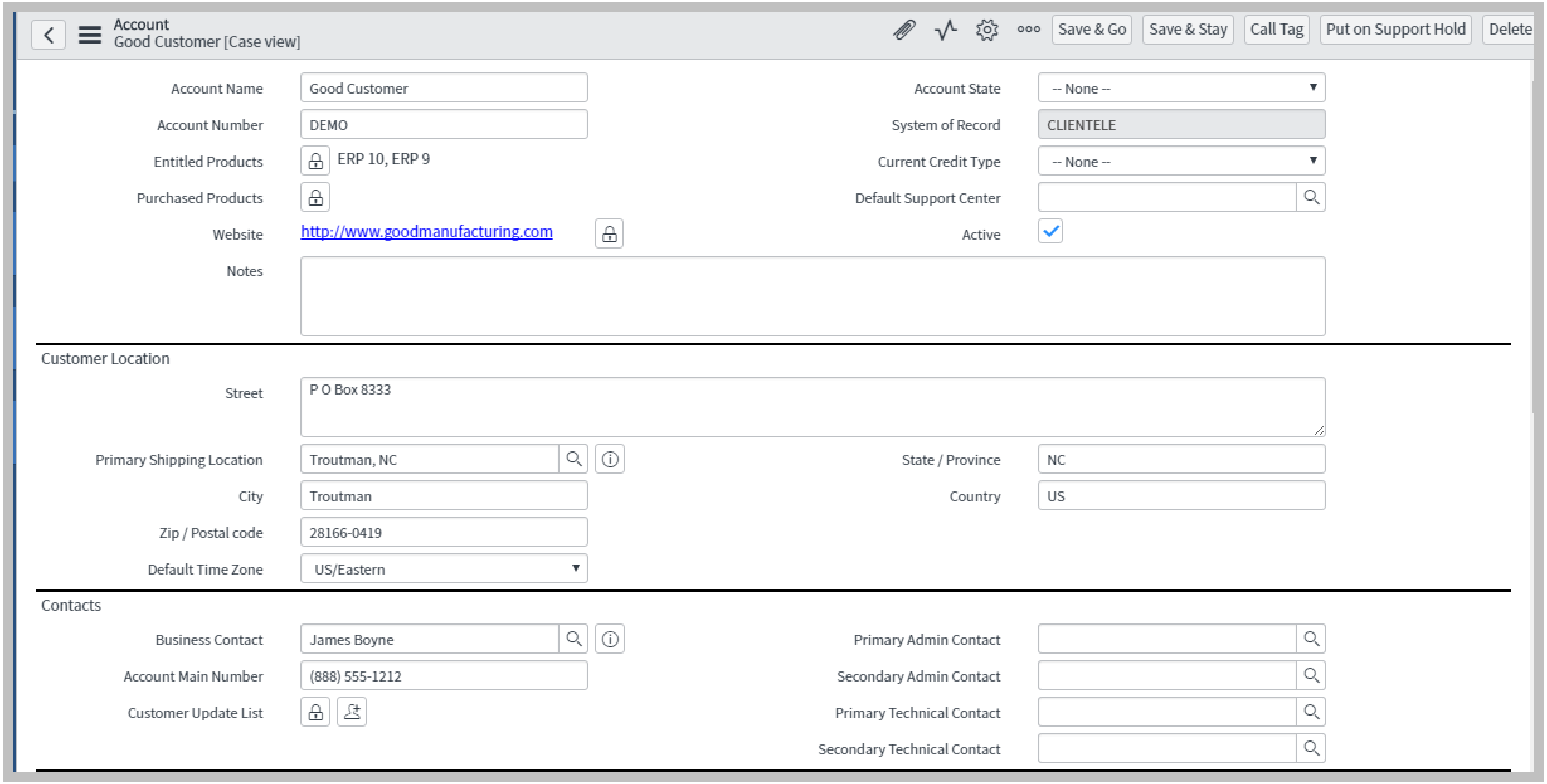
titlements

Customer Attributes	
Contract	ECLSW
Entitlement	Eclipse Soft ware Maintenance
Service Model Description	ECLIPSE DISTRIBUTION MANAGEMENT SYSTEM SUPPO

Embedded Collaboration



Time Worked	00:21:52 00 21 52
Customer Update List	boss@company.com
Internal Update List	


Account
Good Customer [Case view]
Save & Go
Save & Stay
Call Tag
Put on Support Hold
Delete

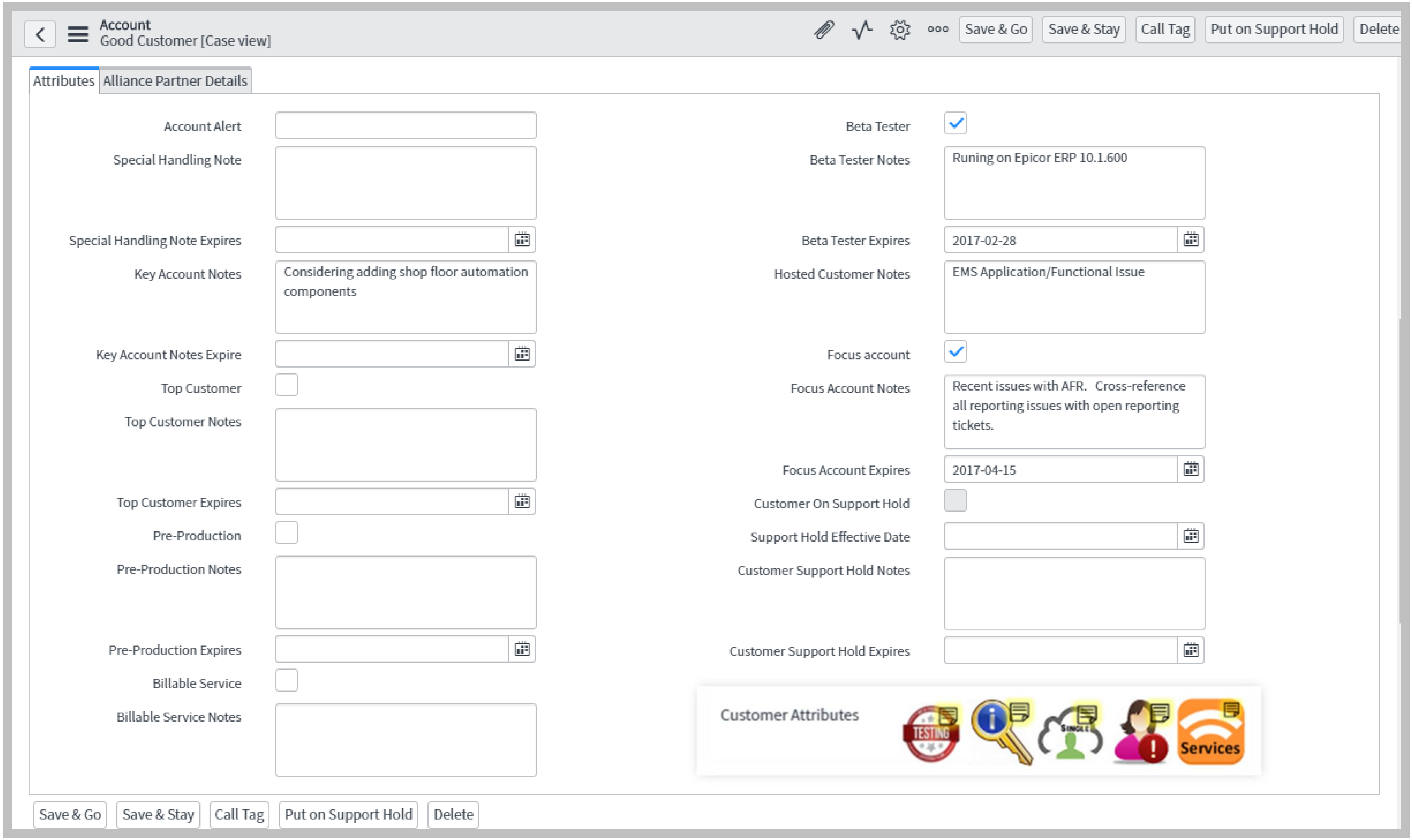
Account Name	Good Customer	Account State	-- None --
Account Number	DEMO	System of Record	CLIENTELE
Entitled Products	ERP 10, ERP 9	Current Credit Type	-- None --
Purchased Products		Default Support Center	
Website	http://www.goodmanufacturing.com	Active	☑
Notes			

Customer Location

Street	P O Box 8333		
Primary Shipping Location	Troutman, NC	State / Province	NC
City	Troutman	Country	US
Zip / Postal code	28166-0419		
Default Time Zone	US/Eastern		

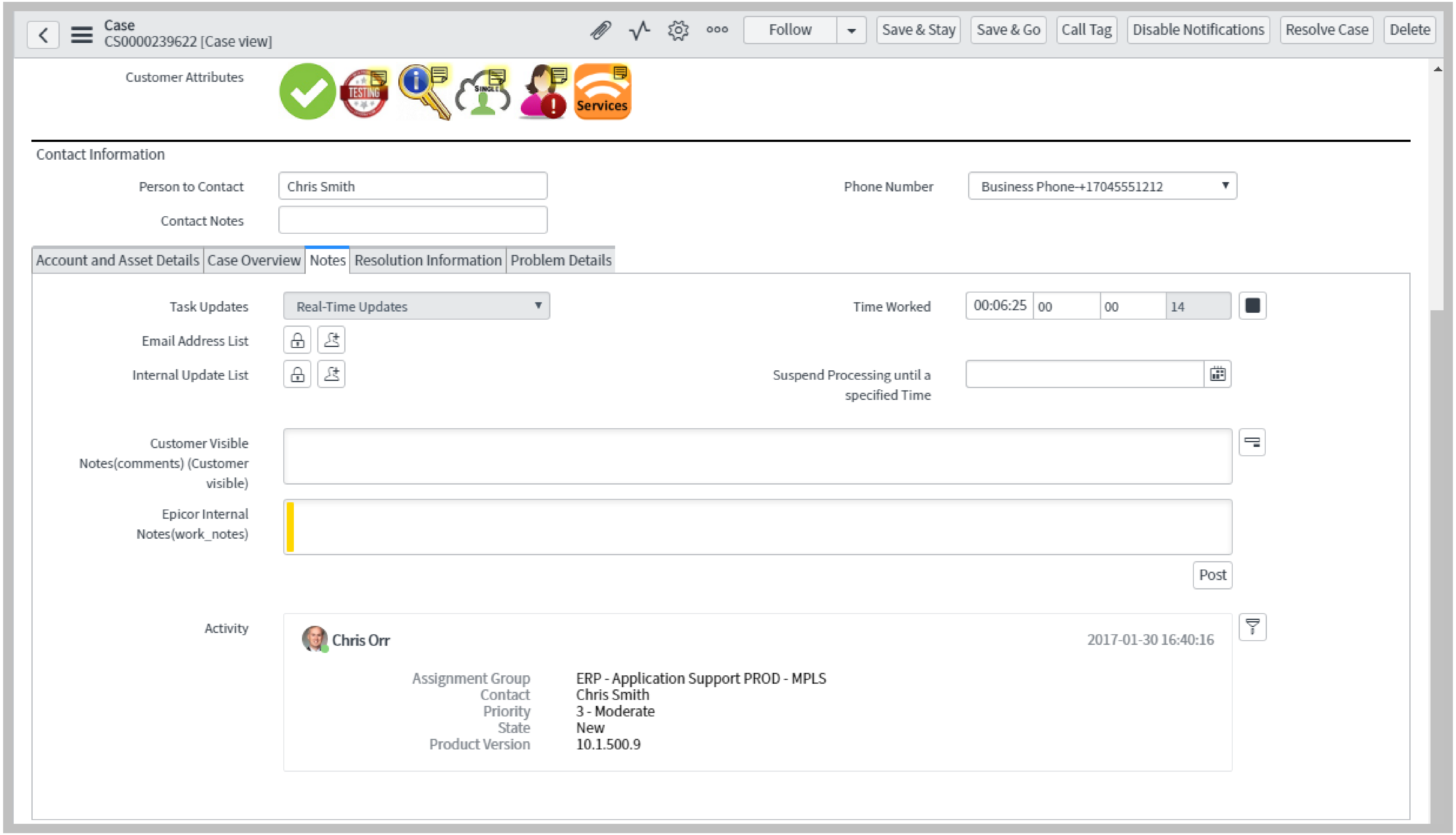
Contacts

Business Contact	James Boyne	Primary Admin Contact	
Account Main Number	(888) 555-1212	Secondary Admin Contact	
Customer Update List		Primary Technical Contact	
		Secondary Technical Contact	


Account
Good Customer [Case view]
Save & Go
Save & Stay
Call Tag
Put on Support Hold
Delete
Attributes
Alliance Partner Details
Customer Attributes
TESTING
SINGLE
Services
Save & Go
Save & Stay
Call Tag
Put on Support Hold
Delete

Account Alert:
Special Handling Note:
Special Handling Note Expires:
Key Account Notes: Considering adding shop floor automation components
Key Account Notes Expire:
Top Customer: ☐
Top Customer Notes:
Top Customer Expires:
Pre-Production: ☐
Pre-Production Notes:
Pre-Production Expires:
Billable Service: ☐
Billable Service Notes:

Beta Tester: ☑
Beta Tester Notes: Runing on Epicor ERP 10.1.600
Beta Tester Expires: 2017-02-28
Hosted Customer Notes: EMS Application/Functional Issue
Focus account: ☑
Focus Account Notes: Recent issues with AFR. Cross-reference all reporting issues with open reporting tickets.
Focus Account Expires: 2017-04-15
Customer On Support Hold: ☐
Support Hold Effective Date:
Customer Support Hold Notes:
Customer Support Hold Expires:



Follow
Save & Stay
Save & Go
Call Tag
Disable Notifications
Resolve Case
Delete
TESTING
SINGLE
Services
Account and Asset Details
Case Overview
Notes
Resolution Information
Problem Details
Post

Case
CS0000239622 [Case view]

Customer Attributes

Contact Information

Person to Contact: Chris Smith

Contact Notes:

Phone Number: Business Phone-+17045551212

Task Updates: Real-Time Updates

Email Address List

Internal Update List

Time Worked: 00:06:25 00 00 14

Suspend Processing until a specified Time:

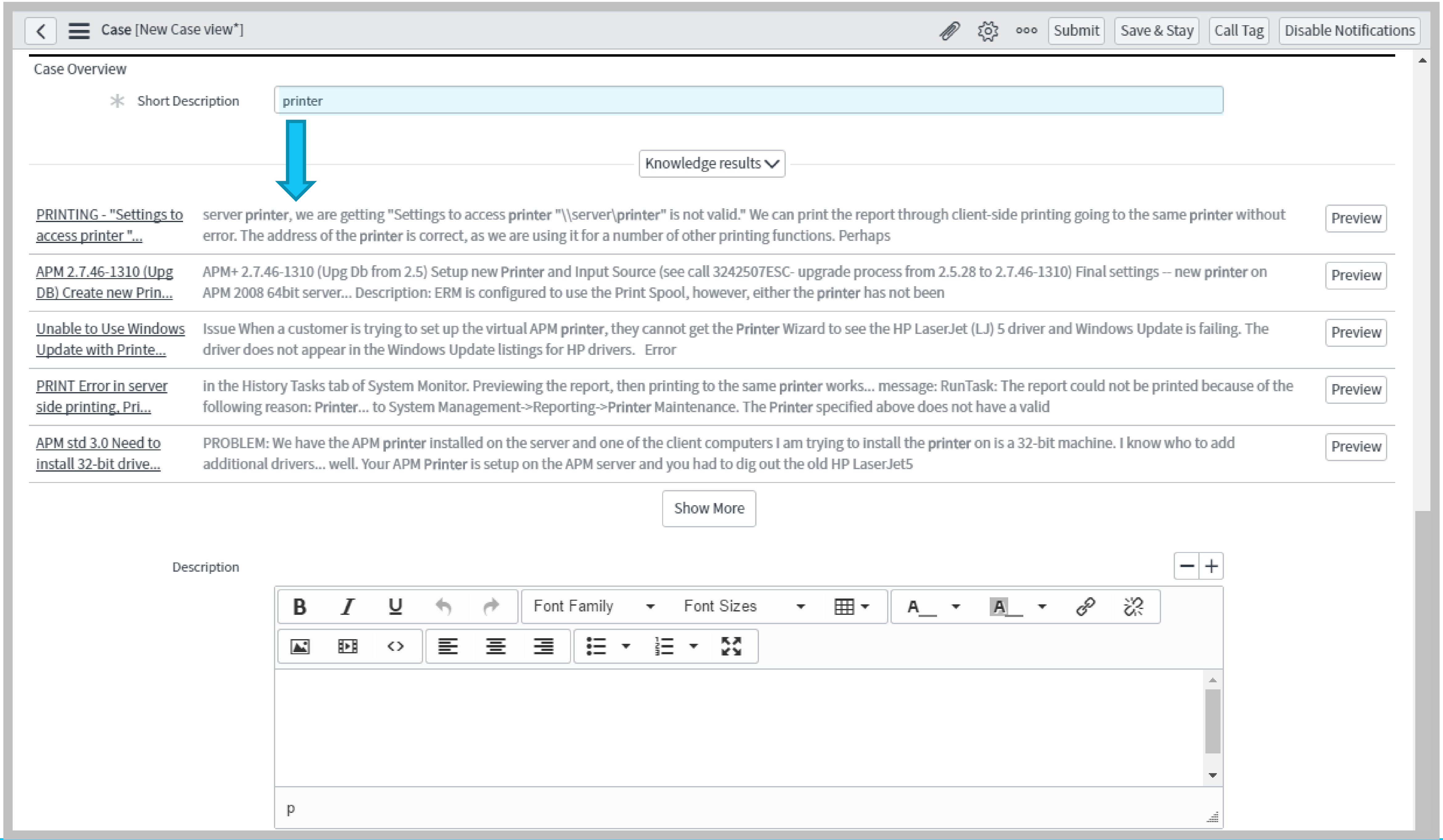
Customer Visible Notes(comments) (Customer visible):

Epicor Internal Notes(work_notes):

Activity

Chris Orr 2017-01-30 16:40:16

Assignment Group	ERP - Application Support PROD - MPLS
Contact	Chris Smith
Priority	3 - Moderate
State	New
Product Version	10.1.500.9



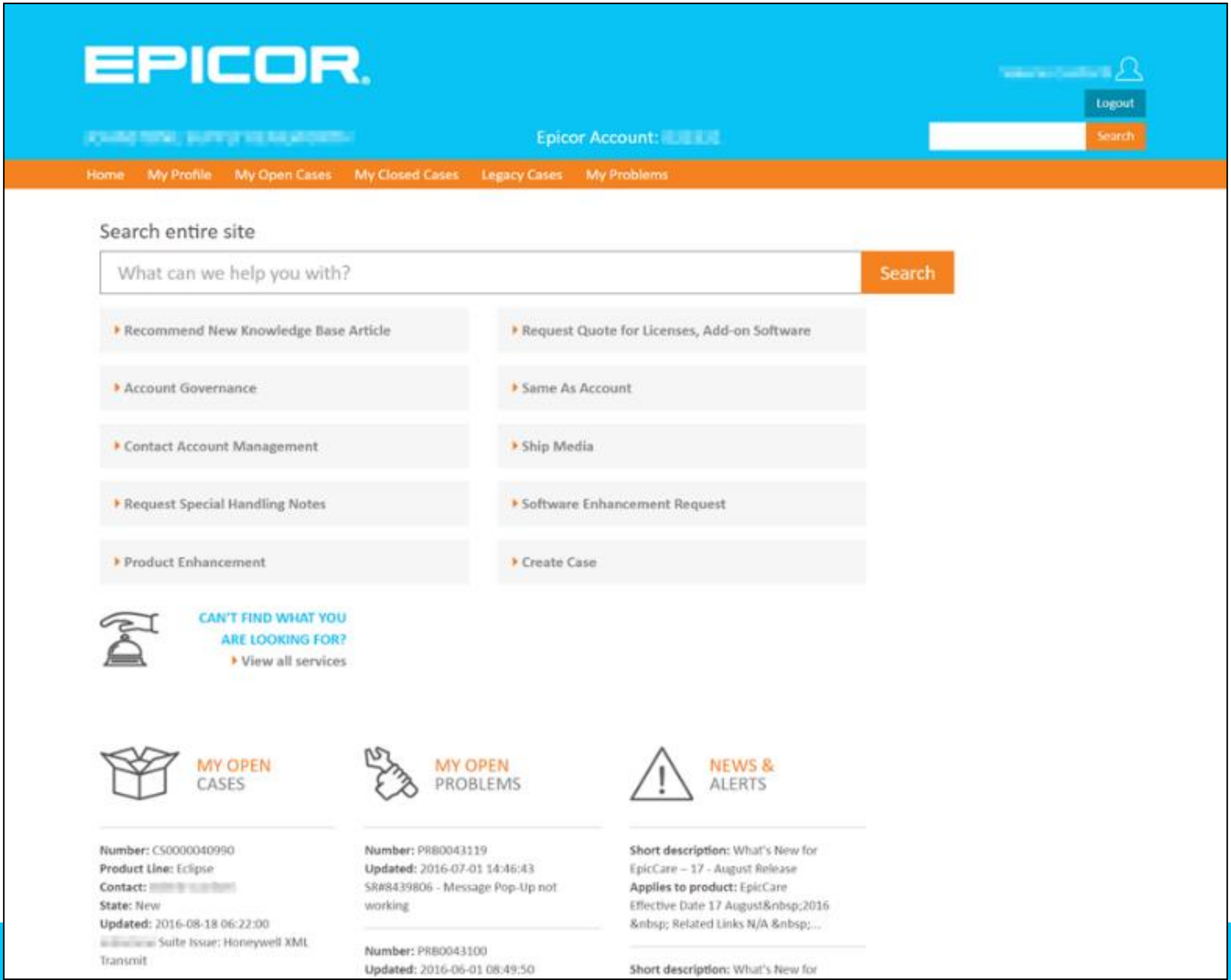
Case Overview

Short Description: printer

PRINTING - "Settings to access printer "...	server **printer**, we are getting "Settings to access **printer** "\\server\printer" is not valid." We can print the report through client-side printing going to the same **printer** without error. The address of the **printer** is correct, as we are using it for a number of other printing functions. Perhaps	Preview
APM 2.7.46-1310 (Upg DB) Create new Prin...	APM+ 2.7.46-1310 (Upg Db from 2.5) Setup new **Printer** and Input Source (see call 3242507ESC- upgrade process from 2.5.28 to 2.7.46-1310) Final settings -- new **printer** on APM 2008 64bit server... Description: ERM is configured to use the Print Spool, however, either the **printer** has not been	Preview
Unable to Use Windows Update with Printe...	Issue When a customer is trying to set up the virtual APM **printer**, they cannot get the **Printer** Wizard to see the HP LaserJet (LJ) 5 driver and Windows Update is failing. The driver does not appear in the Windows Update listings for HP drivers. Error	Preview
PRINT Error in server side printing, Pri...	in the History Tasks tab of System Monitor. Previewing the report, then printing to the same **printer** works... message: RunTask: The report could not be printed because of the following reason: **Printer**... to System Management->Reporting->**Printer** Maintenance. The **Printer** specified above does not have a valid	Preview
APM std 3.0 Need to install 32-bit drive...	PROBLEM: We have the APM **printer** installed on the server and one of the client computers I am trying to install the **printer** on is a 32-bit machine. I know who to add additional drivers... well. Your APM **Printer** is setup on the APM server and you had to dig out the old HP LaserJet5	Preview

Description

EpicCare Customer Portal



EPICOR.
[redacted]
Logout
Search
[redacted]
Epicor Account: [redacted]
Home
My Profile
My Open Cases
My Closed Cases
Legacy Cases
My Problems

Search entire site

What can we help you with? Search

- Recommend New Knowledge Base Article
- Request Quote for Licenses, Add-on Software
- Account Governance
- Same As Account
- Contact Account Management
- Ship Media
- Request Special Handling Notes
- Software Enhancement Request
- Product Enhancement
- Create Case

CAN'T FIND WHAT YOU ARE LOOKING FOR?
- View all services

MY OPEN CASES

Number: CS0000040990
Product Line: Eclipse
Contact: [redacted]
State: New
Updated: 2016-08-18 06:22:00
[redacted] Suite Issue: Honeywell XML Transmit

MY OPEN PROBLEMS

Number: PRB0043119
Updated: 2016-07-01 14:46:43
SR#8439806 - Message Pop-Up not working

Number: PRB0043100
Updated: 2016-06-01 08:49:50

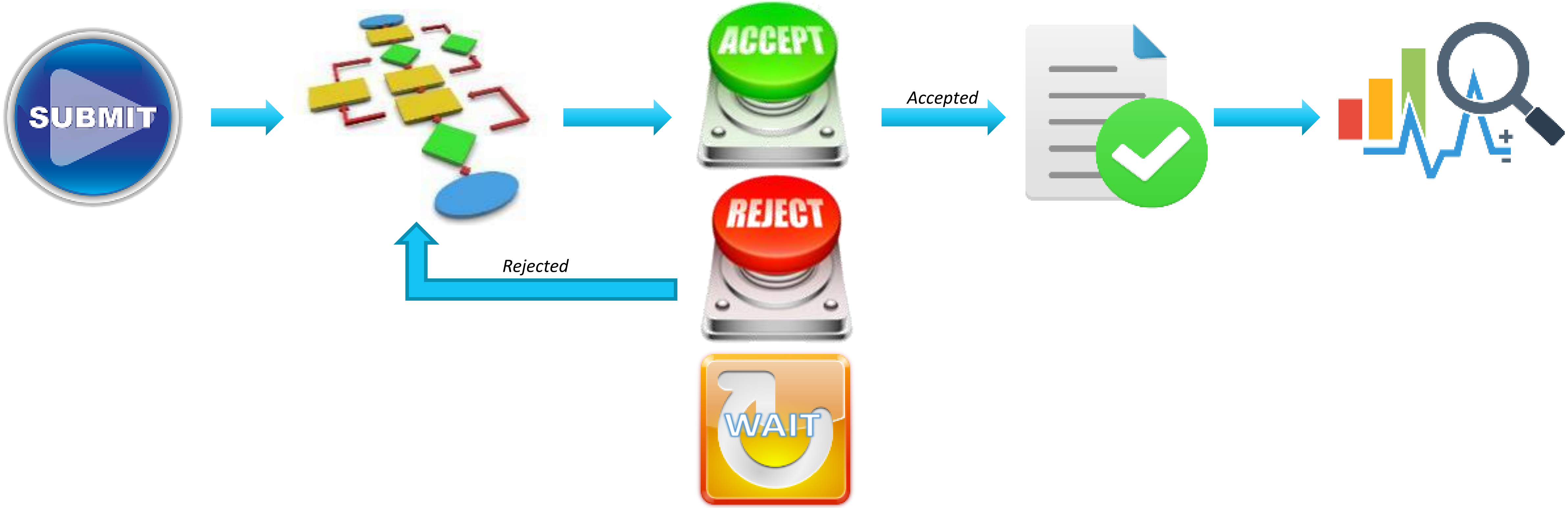
NEWS & ALERTS

Short description: What's New for EpicCare – 17 - August Release
Applies to product: EpicCare
Effective Date 17 August 2016   Related Links N/A ...

Short description: What's New for

Epicor Case Management and Positive Case Closure (PCC)

Submission → **Solution Determined** → **Solution Proposed** → **Solution Accepted** → **Quality Review**



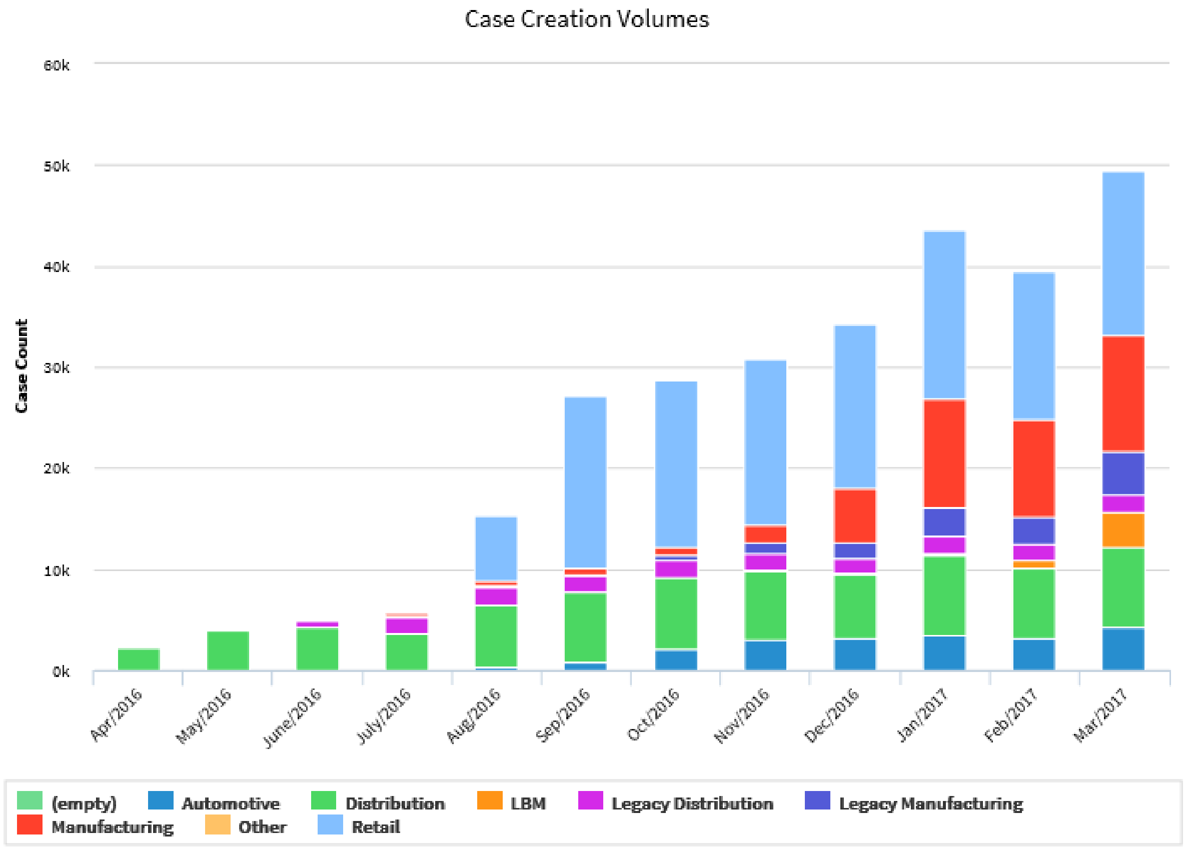
Case is submitted to Epicor Support. The selected Asset, Category, and Subcategory are used to route the case to the best support team.	Epicor works the request. Multiple teams may be involved in the determining a solution. Case Work notes show the progression of the Case.	Once a solution is determined, the solution is proposed to the customer and they are notified via eMail along with several reminders. Customers can choose to … • **Accept** the solution • **Reject** the solution • **Wait** – This option requires that the customer is registered on the Portal. The customer chooses the number of days to Wait and the Case will be suspended until that time after which the customer will again be notified via eMail on these options.	If **Accepted**, the Case is marked as closed and customer accepted. If **Rejected**, the Case is returned to In Progress with a Status of “Customer Reactivated”. If **NO customer response** is received after the several requests, the Case is marked as auto-closed.	Immediately upon closure, the Epicor Survey Process is initiated and the Case moves into the Quality Review process.
State = New	State = In Progress State = Awaiting Customer	State = Resolved	State = Closed	

©

Business Results

EpicCare – The Results

- 51,000 users from Customers and Partners registered for EpicCare
- Run-rate of 500,000+ support cases annually going through the single EpicCare platform
- 33% of all support cases being logged through the new EpicCare customer portal
  - Increasing 1-2pp per month



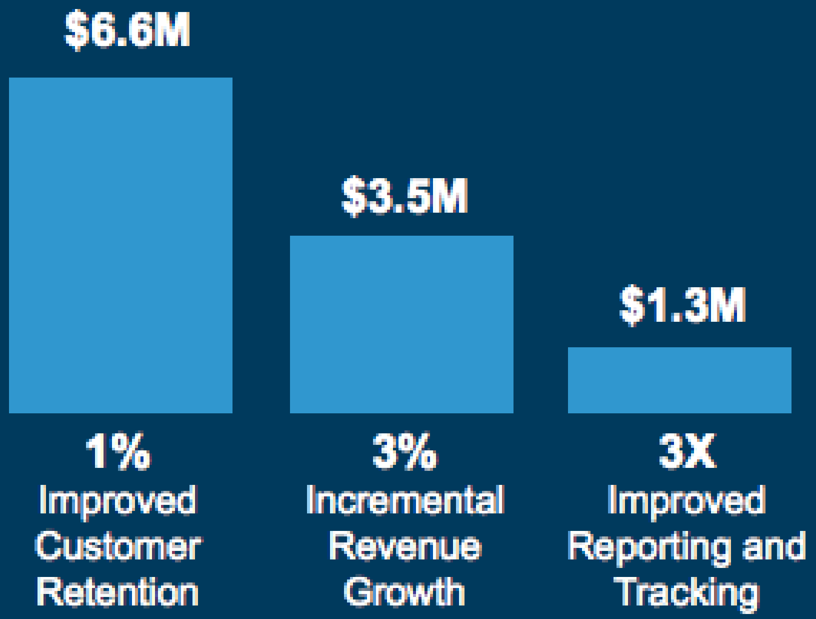
The Total Economic Impact™ Of ServiceNow Customer Service Management

FORRESTER®

Forrester conducted an in-depth interview of Epicor Software Corporation ("Epicor") about their investment in ServiceNow for transforming their global support system. The three-year financial impact is as follows:

SUMMARY OF 3-YEAR BENEFITS

Risk adjusted



104% ROI

$11.4M Total 3-Year Benefits

⬆ 10% Customer NPS

EpicCare Customer Feedback

"…HUGE improvement over the old system …

What am I going to do with all of my free time?"

— Retail Customer

"The new portal is amazing…Especially like the formatting in the Knowledge Base"

— Distribution Customer

"You can actually drop screen shots right into the website [and] reply to a case notification email with a screen shot…Just those two things and the ability to simply reply by email to the cases are HUGE…"

— Distribution Customer

"EpicCare is working well and support has been great…certainly a well-functioning support system"

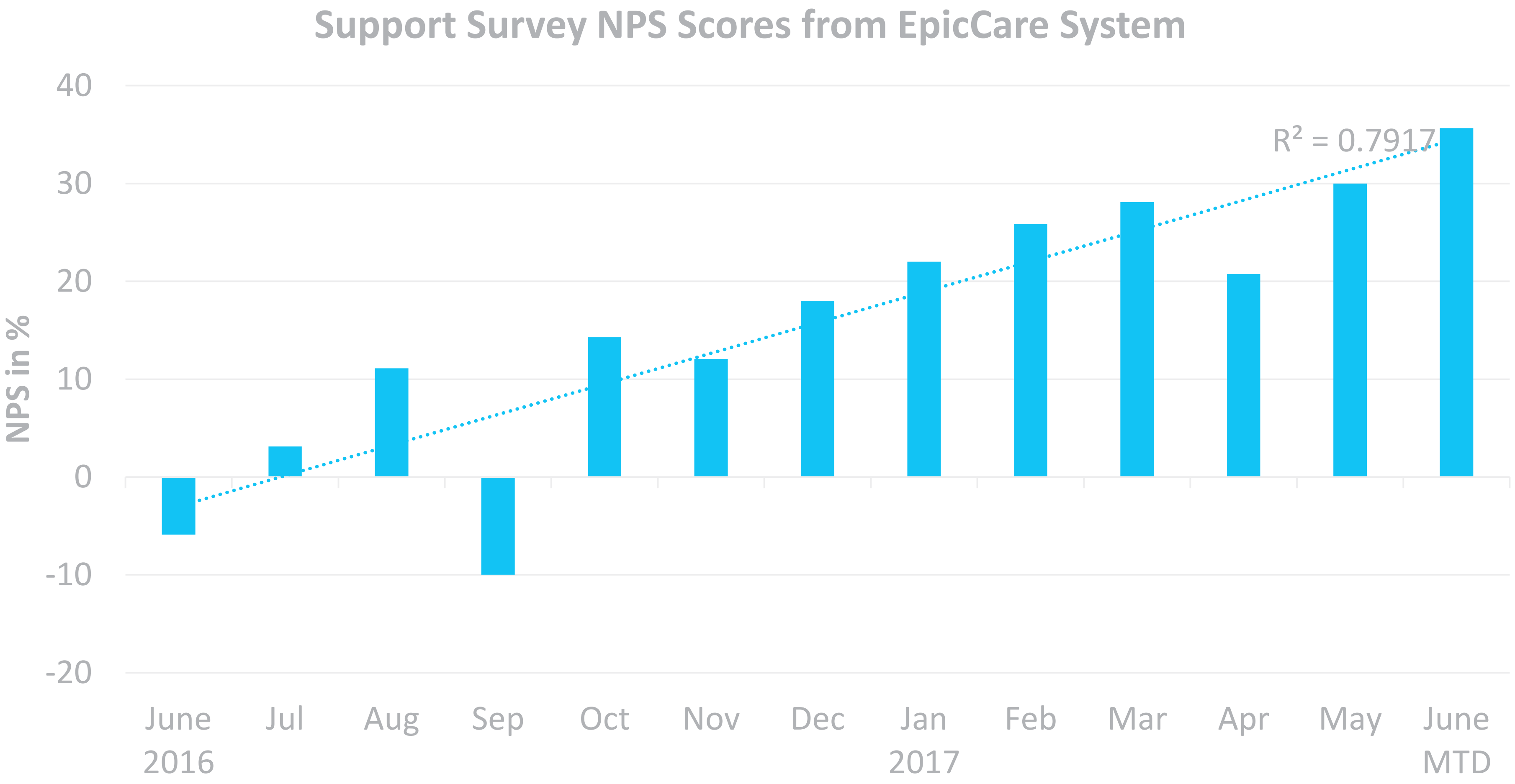
— Manufacturing Customer

"Congratulations…. EpicCare helps us !"

— Channel Partner

And most importantly…

Early Indication of NPS Improvement….



What’s next for Customer Support at Epicor ?

- EpicCare global rollout completed
  - Now in EpicCare *Continuous Improvement* phase
- Upgrade EpicCare from Geneva to Jakarta
- Continued partnership with ServiceNow for Customer Service
- ServiceNow used for other parts of Epicor
  - ITSM for Internal IT completed May 2017
  - Other areas ?

servicenow

And Finally…

An Award for EpicCare

- May 2017: The EpicCare project announced as the winner of a ‘Stevie’ for **Customer Service Department of the Year** in the 2017 American Business Awards

- Comments from the judges:

  “A transformative year for Epicor. Not many can replace all their systems and still show improving metrics”

  “The new electronic case management system is impressive”

  “You have been able to navigate the complexity of mergers and acquisitions nicely. Congratulations”

  “All I can say is ‘well done’.”

Top Three Key Takeaways

- Reached “the end of the beginning” of our support transformation
- Focused now on ‘continuous improvement’
- High-profile project - very successful
  - Delivering results for both customers and the business
  - Recognized all the way up to the Epicor Board and investors
  - Independent verification
  - Partnership with ServiceNow key to success
  - Much more to come….

EPICOR

grow business not software™

תודה
Dankie
Gracias
Спасибо
شكراً
Merci
Takk
Köszönjük
Terima kasih
Grazie
Dziękujemy
Dėkojame
Ďakujeme
Vielen Dank
Paldies
Kiitos
Täname teid
谢谢
Thank You
Tak
感謝您
Obrigado
Teşekkür Ederiz
감사합니다
Σας ευχαριστούμε
ขอบคุณ
Bedankt
Děkujeme vám
ありがとうございます
Tack

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