

# Case Study: Social Initiative Dramatically Improves a Company's Customer Support and Profitability

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**Analyst(s):** Michael Maoz

By focusing on building a social support community with clearly defined business objectives, workflows and metrics, Autodesk has demonstrated that social media and peer-to-peer support have enabled the company to meet the expectations of a large customer base, all while dramatically reducing support costs and fostering greater interaction with the Autodesk brand.

## Key Findings

- Experimentation and rapid iterations of social strategies can quickly indicate and validate success, enhancing long-term projects and enabling fine-tuning the yearly goals fixed by the service organization.
- Typically, only 1% of community participants are active in creating new posts, and studies show they are motivated by a desire for the recognition and respect of their peers, rather than financial reward.
- Instead of a dedicated, full-time support staff maintaining the customer forum, the company's service and support agents are encouraged to participate in the forums during their regular shifts. In enterprise-class businesses, many teams work on making customer communities successful. Potential contributors represent a variety of departments, including technical support, technical documentation, product development, marketing and customer service.

## Recommendations

- Start small and stay focused on understanding the desired core outcomes from a customer support forum. Focus on a pilot project to test and refine strategies, prove success and gain enthusiastic support from executive management.
- Interview the top participants in a forum to gain their insights into what drives them to participate.
- Consider elements of gamification — i.e., using gaming dynamics to actively engage with all community members, appealing to their sense of fun, desire for recognition and advancement, or mastery of key steps in exchange for a token of reward.

## What You Need to Know

Peer-to-peer communities are an excellent way for some industries to lower customer service and support costs while driving up participation on the site. When managed correctly, the Social for Customer Support model provides numerous benefits for the company and the customer to:

- Answer customers' questions quickly
- Take advantage of the combined knowledge of product superusers, advocates and company subject matter experts
- Increase peer-to-peer interaction and participation to build stronger relationships
- Use surveying and analytics to provide deeper insight into customer behavior, as well as product and service improvements
- Decrease company overhead cost while increasing the relationship among customers, as well as the company
- Win new business by proving commitment to customer success

## Strategic Planning Assumption

By 2014, organizations integrating communities into customer support will realize cost reductions ranging from 10% to 50%.

## Case Study

### Introduction

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Founded in 1982, Autodesk is a multinational business known as a leader in 3D design, engineering and entertainment software. Autodesk earned almost \$2 billion in revenue last year, and has 7,000 employees across 95 global locations. With a traditional B2B user base of 12 million customers, the company recently expanded into consumer products, Autodesk is a veteran of online peer-to-peer support, establishing its first support forums more than 15 years ago on CompuServe.

By 2010, it had more than 175 public forums, all the result of organic growth. Many of these communities had low levels of participation, largely due to inconsistent commitment by Autodesk to support these customer communities.

When Autodesk customers encounter a technical issue or question, they use online search engines as the fastest, first line of inquiry. Online communities are indexed very quickly by these search tools, providing a dynamic pool of new, timely answers to customer questions. By focusing on building a social support community, with clearly defined business objectives, workflows and metrics, Autodesk has demonstrated that social media and peer-to-peer support enable the

company to meet the expectations of a large customer base, all while dramatically reducing support costs and fostering greater interaction with the Autodesk brand.

## The Challenge

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The company sells direct and through 1,900 channel partners, with a portfolio of 80 products in 13 languages. In addition to its traditional B2B user base of more than 10 million, Autodesk has begun offering consumer products and has a user base of over 3 million students and faculty around the globe. Providing easy means for customers to answer each other's technical questions (peer-to-peer interactions) with a consistent, but subordinate, company presence drives down customer support costs while providing a pool of quality, easy-to-find answers to frequently asked questions. At the same time, this peer-to-peer interaction fosters greater interest in the products and brand, and tighter bonds among participants in the community.

Autodesk's product support model is built around a subscription. A customer pays an annual fee, and then receives software updates, access to Autodesk staff for support questions, additional training resources, and so forth. The challenge was clear: How to scale to serve this expanding customer base while keeping overhead costs at a manageable level, yet meeting and exceeding customer satisfaction? In addition, as the host of the support community, customers increasingly expected the company to provide more focused support. Autodesk needed to create a sustained business model to serve this large pool of customers in a cost-effective way.

## Approach

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Autodesk was fortunate to have strong groups of users committed to collaboration and peer support from which to expand and improve. The Product Support organization already had a long history of data from which to develop a point of view on what to expect of a community forum. This was used to develop a set of SLAs defining what would be needed to effectively support the community.

Autodesk laid out the overall strategy prior to the June 2010 migration to a new community platform (Lithium). According to Scott Sieper, director of Support Services, "The company's online properties should provide customers the best, fastest method to answer their questions, while offering a smooth transition to deeper layers of engagement as the complexity of the questions increases. We want to guide customers to the most effective method of support for their issue."

In addition, it was noted that customers paying for premium levels of support should have quick, easy access to any layer of engagement with peers or directly with the company. These layers include:

- An easily searchable solution knowledgebase, blogs and existing community, and other online content
- The ability of users to submit a query to their peers in the community if an answer is not found
- A premium support option offering phone or email technical support

This strategy requires a system that can scale to the number of users and articles, support escalation to a representative for some customers, and contain excellent search and content creation capabilities.

Autodesk's customer service department is actively involved in monitoring the community for issues that only they can resolve, such as providing product activation codes, account access assistance, and all other issues not related to technical use of the products.

### Using a Pilot

Before the migration to a new community platform in June 2010, Autodesk tested its strategy and processes. It identified the "Networking and Licensing Management" forum as an ideal candidate, as 12% to 16% of call volume to the support desk was about installation and licensing issues.

Autodesk rebranded the old forum as the "Installation & Licensing" forum and launched a marketing campaign informing clients of the new focus. The early results were impressive: The newly rebranded forum rose from a rank of 35th in overall forum posting activity to fifth within five weeks. There were more posts, and subsequently fewer inbound support requests.

Autodesk's support experts validated the accepted practice of waiting 24 hours to respond to inquiries, enabling existing customer superusers the opportunity for a first response. Staff was eager to participate, so shorter waiting periods were first used. Superusers quickly voiced their displeasure, and the staff backed off to the 24-hour wait period. During this time, the overall response rates to customer questions did not drop as support staff slowed their response time, proving the concept worked. It further validated the important dimensions of respect and reputation for effective community engagement and participation.

The success of this pilot effort gave executive management confidence that the overall strategy was sound. In addition, it solidified their consent for the broader and deeper technology and process changes planned across the entire product support group. Roberto Sigona, vice president of Worldwide Product Support, said, "We knew with the impressive results of this pilot that the strategy was sound, and we were on the right track. We could confidently move forward with further expenditures down the road, for example, the integration with salesforce.com."

Autodesk then created an internal playbook, a staff resource outlining the processes and policies around effective community participation. Further training was developed and provided. Since the migration in June 2010, the product support organization expanded its participation to the top 26 forums within the community. In early 2011, the organization determined that a social CRM integration would help increase efficiency and improve the processes around customer engagement in the company's online communities and began a customized project to bring these ideas to life.

### Developing a Social CRM Integration

In October 2011, Autodesk launched a social CRM solution to enhance the system: Integration between the online community platform (Lithium) and the CRM tool (salesforce.com), which enables some automated and manual workflow enhancements for staff and customers. There are two automated escalations and two manual escalations. While most responses should take place in the

forum, the link to salesforce.com provides the option for direct one-to-one interaction when necessary and enables the support agent to better understand the customer's profile, entitlements and history.

Automated escalations are in place for Autodesk Subscription customers with support. Their level of entitlement is known by internal users of the community platform via single sign-on (SSO). The first priority was to ensure that Subscription customers received timely replies if the community could not respond quickly enough, and, secondly, to verify that their issues got resolved.

When a Subscription customer posts a new question, a timer begins. If 24 hours elapses with no first reply posted by the community, a support case is created in salesforce.com to alert support agents to respond in the forum. This process is transparent to the customer.

The second automated escalation is to check that the issue was resolved to the Subscription customers' full satisfaction. If, after 48 hours, the customer does not mark a reply to his thread as having solved his issue, a case is automatically created in a hidden support queue in salesforce.com. The system sends an email to the customer to close the loop, asking if his issue is resolved or if he needs further assistance. Depending on the customer's answer, the case is either closed or routed to a live queue for staff attention.

In addition to the automated processes mentioned above, there are two manual ones to round out the value of the social CRM integration. Whenever a customer with a premium support entitlement of Gold or Platinum posts a question, the individual has the option at anytime to click a Need an Answer button. This automatically creates a linked case in salesforce.com, alerting staff to respond.

The second manual escalation enables Autodesk staff to highlight any forum thread that needs attention or review; a linked case is created in salesforce.com, and can then be assigned to others or classified for action as necessary.

## Results

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For the recent calendar year, 1 January to 31 December 2011:

- Fifty-three percent of Subscription customers resolved their issues in the online community versus 39% industry average for 2010 (per the Technology Services Industry Association [TSIA]).
- Of the 53% above, 49% would have logged/called in a support request (26% deflection rate).
- Comparing 1Q11 to 4Q11, Unique Monthly Visitors grew by 250%.
- In November/December 2011, 83% of forum posts had a First Reply, on average within 19 hours.
- Annual ROI of Support savings vs. overhead costs amounted to ~\$6.8 million.

Surveys using Net Promoter Scores (NPS) are employed consistently across all customer touchpoints — knowledgebase articles, forums, one-to-one support and reseller support. This

provides a means to benchmark and evaluate perceived value from each method of customer interaction.

## Critical Success Factors

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The ability to innovate and experiment is critical. For example, rather than the Autodesk support person jumping in and answering a post, the person instead patiently waited to see if someone in the community would jump in. Superusers became very powerful parts of the forum. Setting aside an immediate requirement to demonstrate ROI in a short time period gave the support organization time to tweak the processes based on the customer view of what was effective and compelling.

The company acknowledges that from the earliest stages of the project, it was the access to a person who is expert in peer-to-peer support that made rapid improvement possible. In this case, that expert in social networks was provided by the solution provider, Lithium, to brainstorm areas for improvement, and to troubleshoot community issues.

## Lessons Learned

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Autodesk found that the key to a successful community site is to provide guidance and underlying support without it being obvious or forced. The participants are encouraged to provide ad hoc responses, and Autodesk support agents will experiment with different approaches to encourage participation as a way to improve their understanding of the community and its needs.

Autodesk is visionary in looking at customer support as a continuum from technical support agent to customer, to customer to peer, to customer self-service. The customer support group learned quickly that it is important to establish direct involvement between Autodesk technical experts and the community to cement that continuum.

As next steps, Brian Kling, the program manager for Autodesk Community and Social Media, is working on the next stage of evolution for its online communities. Noting that, "We have made great strides in the past 18 months, but this is only the beginning. We will continue to significantly improve and innovate in this area."

Potential areas of focus include:

- Employ a rank-and-reputation system.
- Pilot machine translation to encourage more non-native English participation.
- Develop a more formal superuser engagement program.
- Increase customer awareness and participation through more extensive marketing of the online communities.
- Offer training for the rest of the company to ensure that Autodesk consistently interacts in a professional and personable manner with customers in its online communities.

## Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"The Concise Social CRM Vendor Guide, 2012"

"Social CRM Market Definition and Magic Quadrant Criteria, 2011"

"Magic Quadrant for Social CRM"

"Social CRM Has Made Your New Customer Service Systems Obsolete"

"Hype Cycle for Business Use of Social Technologies, 2011"

"Seven Steps to Gain Approval for a Social CRM Project"

"Maintaining Funding for Social CRM"

"Applying the Eight Building Blocks of CRM to Social Media"

"Facebook Will Augment, Not Replace, the CRM Customer Service Contact Center"

"How Social Media Will Transform CRM in Each of the Four Types of Customer Service Contact Centers"

## Regional Headquarters

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### Corporate Headquarters

56 Top Gallant Road  
Stamford, CT 06902-7700  
USA  
+1 203 964 0096

### European Headquarters

Tamesis  
The Glanty  
Egham  
Surrey, TW20 9AW  
UNITED KINGDOM  
+44 1784 431611

### Asia/Pacific Headquarters

Gartner Australasia Pty. Ltd.  
Level 9, 141 Walker Street  
North Sydney  
New South Wales 2060  
AUSTRALIA  
+61 2 9459 4600

### Japan Headquarters

Gartner Japan Ltd.  
Aobadai Hills, 6F  
7-7, Aobadai, 4-chome  
Meguro-ku, Tokyo 153-0042  
JAPAN  
+81 3 3481 3670

### Latin America Headquarters

Gartner do Brazil  
Av. das Nações Unidas, 12551  
9° andar—World Trade Center  
04578-903—São Paulo SP  
BRAZIL  
+55 11 3443 1509

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