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for Service Innovation™

# Intelligent Swarming<sup>sm</sup> Considerations for Starting Out

# Intelligent Swarming is About



*Solving problems in the most efficient way*

- ✓ *getting the right people on the right work*
- ✓ *getting the right people to the right people*
- ✓ *Inspiring people to contribute to overall success*



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## Current Challenges

# Increasing Complexity



## We're asked to:

- Reduce customer/employee effort
- Increase customer success & loyalty
- Reduce spending through increase operational efficiency

## While facing:

- Increasing customer expectations
- Multi-dimensional, multi-region issues
- A shortage of skilled resources (the Great Resignation)
- Ever-increasing security and privacy concerns
- Dynamic shifting working environments



# Low Engagement



60-70% of the workforce is “dis-engaged” with the purpose, intent of the business they work for. (Gallup, Forbes, Zuboff)

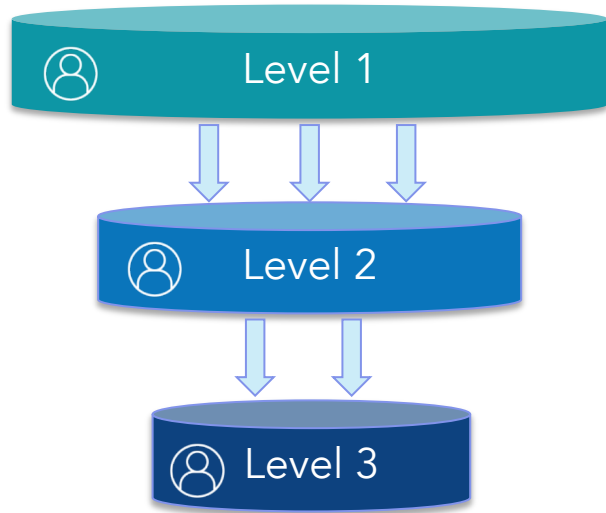


Companies use **less than 40%** of the skills they employ (Gallup, StrengthsFinder)

**51%** of the workforce is looking for new opportunities.

(Gallup, StrengthsFinder)

# Traditional Service Model

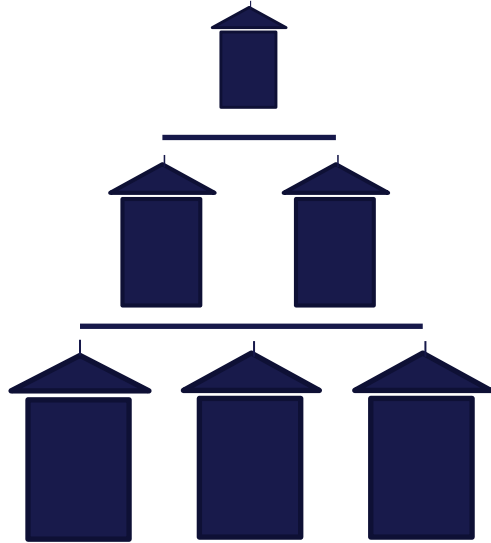


- Based on silos and hierarchies
- Limits people's ability to contribute
- Linear, escalation based
- Goals on activity
- Designed to maximize the silo's productivity



...Creates nothing but *frustration* for our customers *on new issues*

# Silos = Separation



## We build very effective silos!

- Org structures
- Regions / Office Location
- Management layers
- Job Descriptions
- Hero Mentality

Traditional Structures & Thinking Inhibit Us

# Intelligent Swarming is the Response



*We need an environment that...*

- Facilitates **collaboration**
- **Optimizes** resources
- Builds **breadth and depth** of skills
- Enables a sense of **self empowerment**
- Focuses on the **customer**



*dynamic, fluid, adaptive*  
Network based organizations

*Challenges 30 years of accepted practices and structures*



# Intelligent Swarming



## *Improves Relevance*

Interactions are emergent and focused on the matter at hand



## *Expands Reach*

Expansive network of talented people to support each other



## *Increases Diversity*

Tap into and develop a broad range of perspectives, skills, and knowledge



## *Enables Collaboration*

Easy, low effort way to work across arbitrary boundaries



- **Improved Resolution**
  - Reduction in call backs
  - Reduction in time to resolve, increase in capacity
  - Resolve complex issues more quickly
- **Employees Love It**
  - Increased employee satisfaction/loyalty/engagement
  - Skills growth, accelerated learning
  - Reduced new hire training time by up to 50%
- **Customers Love It**
  - Better customer experience
  - Dramatically increased customer satisfaction/loyalty
  - A better way to deliver on company's / organization's brand promise

# Is It Right for You?



Intelligent Swarming creates value in any environment, but the most value is realized when the complexity and/or severity of the work is moderate to high

Factor to Consider	Swarming is Relevant if....
Group's average work minutes to resolve (complexity)	-Average time to resolve new (work minutes) is greater than 15 min
New vs. known ratio	-The ratio of new issues coming into the support center is greater than 30%
Percentage / impact of high severity issues	-% of high severity issues is increasing -High severity issues represent a significant amount of the work
Percentage resolved at each level of support	-The percentage of cases requiring escalation to a higher tier is increasing
Maturity and culture of the group	-Trust within the group is high and collaboration is natural



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# Intelligent Swarming Core Concepts and Practices

# Core Concepts of Intelligent Swarming



## One Team

- *Organizations function as a single team with diverse skills*

## Work is Work

- *Work is any activity that creates value and contributes to success*

## Relevant Connections

- *Get work to the best people able to solve it on first touch*
- *Majority of issues are not Swarmed*
- *Person who takes the case owns it until resolution*

## Enable Collaboration

- *Make it easy to ask for help and to offer help*

## Recognize Contribution

- *Recognize the creation of value by teams and individuals*

## Managers Coach

- *Managers are facilitators and coaches, not judges or owners of a team*



# Intelligent Swarming Practices

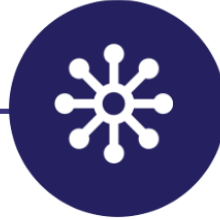


## CONNECT

Make work visible to the best resources to solve on first touch

—  
Highly relevant work visibility

Classification of People & Work

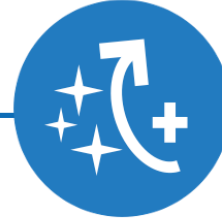


## COLLABORATE

Get help on work from anyone with knowledge

—  
Raise my hand to ask for help

Opt-in to offer help



## RECOGNIZE

Contributions by individuals and teams to overall success

—  
Diverse skills and competencies

History of contribution

*Process for handling exceptions*

# Lessons Learned



Don't over-engineer the process or the tool

The people doing collaboration should be the ones to design *and own* the process



Culture change

- It's ok to ask for help
- Balance of individual outcomes and team outcomes
- 1<sup>st</sup> and 2<sup>nd</sup> line managers must shift mindset



Consistency and communication

- Hearing vs. experiencing (internalizing)
- Rate of change makes it hard to keep everyone informed





Collaboration


Not all issues are worthy of collaboration: 60-70% issues solved with initial swarm (the customer and a Support Analyst)


# You know you are doing Intelligent Swarming when...





 There is a common classification model for people, work and knowledge


 People have visibility to relevant work

 People opt-in, to take ownership of work or to help others

 There are no handoffs within the support organization

 People feel they are part of a team and have easy access to help

 Increase in breadth and depth of skills / competencies

 Collaboration happens based on relevance not organizational boundaries



# Intelligent Swarming Resources



- Intelligent Swarming Practices Guide
- Case Studies
- Intelligent Swarming Fundamentals Self-Paced Training
- Intelligent Swarming Fundamentals Exam

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