

# Learning & Support Operating Model

## 1. Mission

- a. To provide Learning & Support for Capital Markets on the daily use of Capforce which consists of Salesforce, Eloqua & Investor Model. Solve customers' issues, and perspectives, on the use of Capforce by providing direct one on one via WebEx, Chatter posts, email support to maximize JLL employees' use of JLL's data resources on a daily basis.

## 2. General Outline

- a. Create a team that can answer Users Capforce questions during and after the planned Office Rollout. The resources and staff will be available with the first office rollout.
- b. All questions and feedback will be tracked via service tickets and broken down by subject area.
- c. Summaries of these tickets will be monitored weekly to identify weak knowledge areas and adjusted so future Office Rollouts can be more effective. If needed, Webinars can be developed for specific offices if their rollout has occurred for critical issues.
- d. The team will focus on Capforce best practices training and point to available resources to help users become more independent.

## 3. Current Measurements

- a. Disclaimers
  - i. Metrics shown are current Capforce numbers
  - ii. HFF Salesforce metrics should also be included
  - iii. Metrics should be taken at the beginning of rollout (May 1<sup>st</sup>?)
  - iv. Specific Office metrics, based on users, should be taken just prior to each offices' scheduled rollout
  - v. Also see 'Success' section
- b. *Key Measurements*
  - i. Login's
    1. 4.2 times Users per week average
    2. [Aaron Dashboard](#)
  - ii. 362 Users last week\*, Role (Brokers 115, Analyst 112, Admin 60, Project/Support Team 54, Management 21)
    1. [JZ Login By Week V2](#)
  - iii. 365 Users Last week\*, (City detail available in report)
    1. [JZ Login By Week V2 w/City](#)
  - iv. 33 Transactions created last week\*
    1. [JZ Transactions Created](#)
  - v. 43 Content created last week\*
    1. [JZ Content Created Date](#)

- vi. 49 Bids created last week\*
    - 1. [JZ Bids Created](#)
  - vii. 14 Campaigns with Comments/year\*\*
    - 1. [JZ Campaigns Members/Comments R:Americas](#)
  - viii. 144 Reports created/Week\*\*\*
    - 1. [JZ Test Report of Report Creation/Week](#)
    - 2. (we definitely affected this number)
  - ix. 731 Reports Run/Week\*\*\*
    - 1. [JZ Test Report of Report Run/Week](#)
- \* Average available with the addition of 'Count' field  
 \*\* Comments need additional review since 'Created Date' does not exist  
 \*\* only a measurement of successful reports. A custom report is needed to show user usage and limit to Americas

#### 4. Resources

- a. Resources are pieces of support that may or may not exist but essential to reaching our mission statement. Each resource will have a general Description, its intended Purpose, indication if Setup is Required, Start Date of the resource use (or deadline for setup assuming all resources are subject to enhancements), Connections to other resources or channels, if Staff is needed for management, if the resources needs to be assigned a Manager to oversee creation and maintenance and if there is an End Date for the resource.
- b. *Support Page (Sharepoint?)*
  - i. Description: This will be a website that is accessible to anyone. current metrics, timelines, channels (ways to ask questions), tracking, resource estimates, post metrics
  - ii. Purpose: Single point for users and Adoption team to put and disseminate information. This site can document the Office Rollout, hold completed course material, link users to Adoption helpdesk, Support Chatter Group, schedule WebEx's, How-To videos, knowledge articles links, Quick Reference guides, Enhancement requests
  - iii. Required Setup: Design & development, sharepoint (or web development) knowledge required
  - iv. Start Date: May 4th (Comments: Available for Office Rollout)
  - v. Connections: Adoption Helpdesk: Data link, Adoption Helpdesk: Defects links (Enhancements?), Final Curriculum links, Schedule WebEx link, Learning & Support Chatter Group link, Support Number posted, Knowledge Articles links grouped by topics, Links to How-To videos
  - vi. Management: Yes, Creation and Maintenance
  - vii. End Date: none
  - viii. Clarifications: none

c. *Tracking/Ticket System*

- i. Description: A system to track each interaction with a user by staff.
- ii. Purpose: To provide a system of record of user interactions that is measurable and reportable. System must track Interaction Type, Subject/Category, Staff member, User, Issue Description, Resolution Description, the options to provide hyperlinks
- iii. Required Setup: Adopting current Service Cloud for Learning & Support or simple spreadsheet
- iv. Start Date: May 4th
- v. Management: Yes, Creation and Maintenance
- vi. End Date: end of project
- vii. Clarifications: Service Cloud would be great but may not be practical for a short term project. Spreadsheets are usable but not secure and subject to corruption. With spreadsheet version control and backup are critical. This can be cumbersome as the tickets grow.

**5. Channels**

- a. Channels, like Resources, are pieces of support that may or may not exist but essential to reaching our mission. Channels are ways users can interact with Staff members. Each channel will have a general Description, its intended Purpose, indication if Setup is Required, Start Date of the resource (or deadline for completion), Connections to resources, if Staff is needed and how many, whether the resource requires ticket Tracking, if the channel needs to be assigned a Manager to oversee creation and maintenance and if there is an End Date for the Channel.

b. *WebEx Appointments*

- i. Description: To allow users to schedule a WebEx appointment with knowledge staff to solve general or specific problems with Capforce usage
- ii. Purpose: To allow users to one-on-one time with a Capforce expert (Staff) who reinforces the intended Capforce feature and shows users Best Practices. This is done through WebEx and screen sharing. If problems are not solved, Staff follow-up with users until completion. It is not intended to be group training but it can certainly be utilized this way
- iii. Required Setup: Scheduling system that can be controlled by Staff for available and limit length of meetings. If this is available in Outlook this would be simplest (have used [YouCanBook.me](https://www.youcanbook.me) with a group email for Staff in the past).
- iv. Start Date: May 4th (Comments: Available for Office Rollout, potential offloading for office overload during rollout phase.)
- v. Connections: Support Page for Appointment Scheduling, Emails to users for follow-up for unresolved issues

- vi. Staff: Yes, 2 staff per appointment, Presenter and support/documentation, Hours TBD based on JLL office culture
- vii. Ticket Tracking: Yes, 1 ticket per appointment
- viii. Management: Yes, review of schedule, reviews of tickets closure, alert of adoption issues, common problems or points of frustration
- ix. End Date: 90 days after Office Rollout
- x. Clarifications: 2 staff minimum per time slot availability, when not staffing WebEx, staff will work on other tickets but WebEx is their priority. Available hours must be decided with the decision affecting the required number of staff members. Hours should mirror office behavior - from 'Early Bird' EST to 'Late Workers' PST. For example, coverage an hour before and after normal business hours (9am to 5pm) would require 4 staff members to cover one slot with 7am CST starts to 8pm CST. Staff hours would be 7am - 3pm and 12pm to 8pm

c. *Chatter Posts*

- i. Description: Allow users to Post or ask Questions in a public chatter group for the sole purpose of answering Posts or Questions in a way that reinforces the Capforce feature and shows users Best Practices. Purpose: The Support Chatter Group is monitored by Capforce SME's who reply to Posts or Questions with replies that reinforce Capforce's features and Best Practices by promoting existing resources - Knowledge Articles, Quick Reference Guides, and How-To Videos. The chatter group also serves to Acknowledge major issues/defects, updates, tips and Best Practices. Over time the chatter group becomes its own resource as users and Staff can tag past answers and teach users to be self-supportive.
- ii. Required Setup: Setup of Salesforce Chatter group
- iii. Start Date: May 4th (Comments: Available for Office Rollout)
- iv. Connections: recommend the Support Page link, Schedule WebEx link, Support Number posted
- v. Staff: Yes, 2 with additional staffing from WebEx Staff
- vi. Tracking: Yes
- vii. Management: Yes, review of schedule, reviews of tickets closure, alert of adoption issues, common problems or points of frustration
- viii. End Date: End of project, self-supportive model after project ends
- ix. Clarifications: Staffing will overlap with WebEx Staff. So Support staff all work on Chatter Questions, WebEx Staff takes less since their focus is on WebEx appointments

d. *Email Support*

- i. Description: Group email for specific Capforce questions
- ii. Purpose: A Group Email address is monitored by Capforce SME's who reply to emails that reinforce Capforce's features and Best Practices by promoting existing resources - Knowledge Articles, Quick Reference Guides, and How-To Videos. This allow users an closed traditional avenue to ask questions users may not ask in a public forum like Chatter
- iii. Required Setup: creation of a Group Email, automatic with ticket creation?
- iv. Start Date: May 4th (Comments: Available for Office Rollout)
- v. Connections: Potentially create an acknowledgement email with links to the Support Page, Email Replies will use all available resources when answers users questions
- vi. Staff: Yes, same Staff as
- vii. Tracking: Yes
- viii. Management: Yes, Creation and Maintenance
- ix. End Date: none
- x. Clarifications: none

**6. Staff Procedures**

- a. Daily meeting to review workload
  - i. General information
  - ii. Rollout Issues
  - iii. Daily Schedule review
  - iv. Review outstanding Tickets
  - v. Upcoming System changes
- b. WebEx appointments (30 minutes in length)
  - i. 2 staff members, one leads call, one takes notes, background research
  - ii. When appointments are scheduled, a confirmation email is sent to user and Staff
  - iii. Staff will reach out directly to user after 5 minutes
    1. After 15 minutes the user is asked to reschedule
  - iv. Appointment
    1. Instructions
    2. Description of the issue
    3. Work toward resolution
      - a. Every effort is made for the user to share their share
      - b. Lead user to find resources themselves
      - c. If no resolution is found, the user is assured they will be contacted with a solution
        - i. Minimally at the end of the day, with daily updates until resolved
    4. Notes are updated as needed

c. Chatter Posts

- i. 2 staff members, and any staff not on a WebEx appointment
- ii. Staff members take/are assigned posts as they become available.
- iii. As Chatter users post Post or Questions, staff will answer the users question or issue within 2 hours.
  1. If the question cannot answered, the Post or Question is acknowledged and the answer is posted when it is found.
  2. The user is acknowledged daily if not found via email to keep the general users' view of chatter group positive.
- iv. Answers always try to use and direct users to existing resources.
- v. Superusers are encouraged to answer as well.
- vi. Time permitting, staff will posts 'Tips' that are pinned to group for one week.

d. Emails

- i. Same staff members as Chatter Posts
- ii. Staff members take/are assigned posts as they become available.
  1. Users are encouraged to post to Chatter so others can benefit the answers
  2. Evidently, users will reach out directly to staff members. While this is not encouraged, these are assigned to the staff who receives them
  3. One difference with direct emails, staff is not required to answer the user's question or issue within 2 hours.
- iii. If the question cannot be answered within 2 hours, the user is acknowledged and the answer is given when it is found.
- iv. The user is acknowledged daily if not found via email.
- v. Answers always try to use and direct users to existing resources.

e. Potential Risks

- i. Separation from Standard Helpdesk
  1. There is general confusion by the users on Learning & Support team and the Helpdesk team. Clear communication is needed to minimize this.
  2. Learning & Support is the adoption of business processes to Capforce. The staff does not have SF administrative rights.
  3. It is not unusual for Learning & Support staff to walk users through a detailed helpdesk ticket form to give the helpdesk as much information as possible.
  4. The Standard Helpdesk is encouraged to send longer but simple issues to Learning & Support. (ie - how to build a report).

- ii. Ticket Tracking
  - 1. Automating as much as possible will save time.
  - 2. Good categories/subject tracking will help identify problem knowledge areas to help correct during rollout and for potential webinars to cover additional topics
  - 3. Service Cloud, Spreadsheet or an alternate ticketing system. It must have reporting capabilities
  - 4. Sample spreadsheet for information to be tracked

## **7. Communication**

- a. Regular communication on available Resources and Channels are critical to users. Webinars can be used to promote the WebEx channel. 'Tip of the Week' can be used to promote the Learning & Support Chatter Group. 'Capforce Friday' Newsletter can be a way to prep office rollouts and show early measurement numbers. Sales teams love to compete. A dashboard showing net increases in first 90 days in key indications by Office could enable team's competitive spirits

## **8. Success**

- a. Record Measurements
  - i. Success will be measured with an increase of records over the current rate of creation. It is important to point out there will be a 'natural' increase has user make mistakes and the records repeated. For example, the incorrect creation of an opportunity, a misassigned activity, etc.
  - ii. It is important to realize JLL normal Business Trends. Less Opportunities created in Denver 90 days could be the result of their April measurement versus their Rollout in July, assuming Denver typically slows down during the summer months. Good measurements will apply overall rate (ie. Opportunities created per week) for both organizations and adjust for their normal trends.
  - iii. Success can be indicated by a measurable increase in key records creation increased percentage 90 days after rollout, after adjusting for trends.
  - iv. Adding the 'Count' field to key objects will allow measurement dashboards to be created.
- b. Ticket Measurement
  - i. Success can also be measured by correlating User Tickets to such increases.
  - ii. Success can also be measured by Ticket Topics showing up on with Early Rollout Offices and Late Rollout offices show lower Tickets in these same topics shows adjustment in training and/or resources