

Weston Morris:

Welcome to the Digital Workplace Deep Dive. I'm your host, Weston Morris.

Weston Morris:

Last month I attended my very first SupportWorld Live conference, hosted by HDI, the help desk Institute. Now, my reasons for attending were threefold. First of all, it was a guest speaker sharing some thoughts on how XLA might be able to improve the hybrid office. I also wanted to hear what other speakers and experts were saying about XLA, but lastly, and I'm gonna say probably most importantly, I wanted to find out what attendees to a conference like this were actually thinking about XLAs where they were going with them. So this episode is dedicated to that last goal. You'll get to hear some of the conversations that I had with five of the attendees about the conference, their views on the role that XLAs and experience management are playing in each of their industries and from each region of the world that they came to visit from. However, before we hear from the attendees, I first had a chance to speak with someone responsible for much of the behind-the-scenes work in planning and hosting the HDI SupportWorld Live conference in Las Vegas. That was Britney Fox. Now please notice, as you listen to the conversation with her, Britney's thoughts on how this conference has evolved to provide more and more content on XLAs and experience management.

Brittany Fox:

I believe, behind the scenes, the event has been a great success. Seems like we've had a great crowd come out. I know a lot of people were excited to have live events come around since the opening up of traveling and having that opportunity. I think it's been a beneficial experience, especially with the increase of the workforce, again, coming back to full force. So we've had a great turnout and we've had a lot of opportunities to experience on the back end what our clients and customers need, and on the front end, how everybody's taken away from each one of our sessions.

Weston Morris:

So let's dig into that just a little bit, cause as an attendee here, I've noticed that there has been a big focus on XLAs, on experience, employee experience management. I mean, what was behind the decision to have so much focus on that topic this year?

Brittany Fox:

I believe we see the change in transition in the XLA side of things or the experience management and impact because we have a big rough change when it came to the change of our workforce over the course of the pandemic. SLAs are in place to help with process and procedure. XLAs, I believe will bring to the forefront, really, what the customer will take away from it. And you're providing a value to your relationship and to your brand. So being able to teach that to a variety of different companies where industry agnostic allows them to have the opportunity to not think about just the behind-the-scenes process and procedure, but really how they're going to continue to show that client that they mean so much to them to get them coming back for their business.

Weston Morris:

One of the things I heard you say implicitly there, Brittany, is this connection between employee experience and customer experience or client experience, down the road. That's the one other question I have for you is, you know, some listeners may be naysayers and may be thinking, ah, this XLA stuff, it's

just a fad, a trend. I mean, what do you think? What can we expect to see at HDI SupportWorld next year?

Brittany Fox:

I believe it's silly to say it's a fad and a trend, a lot of things that we have in place...contractually are in place because we've learned something from our previous past mistakes or our previous experiences when it comes to how we're going to support a customer, how to support a business that we're gonna develop a relationship with. We've done a really good job of providing service level agreements when it comes to again, process, procedure, who's responsible for what, and when, now focusing on what the customer experience is going to be is going to continue that relationship and make it deeper and more sticky. I believe that when we look at the customer and put them forward, rather than just selling to someone as a business or someone as an entity within a business, you're providing to someone who's gonna become an internal cheerleader for you and help spread you within that business itself. So it is twofold and it's bidirectional. It becomes about that relationship and support.

Weston Morris:

Well, awesome. We look forward to, uh, seeing how HDI SupportWorld 2023 evolves in terms of its content around XLAs and experience. Thank you so much, Brittany Fox, for sharing your thoughts with us.

Brittany Fox:

My pleasure. Thank you so much for having me.

Weston Morris:

So as you heard from Brittany Fox, organizations such as HDI, The Help Desk Institute, are providing a lot of guidance and training around XLA and experience management. They almost see a pent-up demand for it amongst various enterprises. Well, let's now listen to some conversations that I had with some of the attendees. I had a chance to speak with folks from Canada, the United States, Brazil, the United Kingdom, each representing different industries ranging from financial to health care to consulting, to publishing. How do they feel about XLAs and experience management? At first, I was able to chat with Ashley LeFort who came to the conference from Prince Edward Island in Canada, where she works for the investment firm Invesco. Now I was really curious about her interest, coming from the financial background, about XLAs and experience management, and if she had any "aha!" moments that she had perhaps collected while attending the conference. Notice how she responded.

Ashley LeFort :

So I'd like to start by taking a bit of a step back in who we're supporting, what we're doing. So in the service desk, we are supporting internal employees. So that is your traders, your salespeople, that are interacting with our shareholders and our financial advisors. So we're really ensuring that the support that we give them is going to impact company revenue. It's gonna impact their ability to do their job. So I think when it comes to my department, we are the customer experience department and we're trying to figure out where that starts and ends, because it's all of technology that needs to be on board, not just the service desk and your deskside support teams. So I think XLAs are really elevating all of technology to get on board with that mission and have that sense of progress.

Weston Morris:

My second question for you is this. You know, we're coming to the end of the conference here. We've both been through a lot of XLA training, XLA collab course, and now I'm just wondering, you know, if you've got an aha moment, something you're gonna take back with you when you return to work.

Ashley LeFort :

Absolutely. So an aha moment for XLAs for me was really the watermelon effect and the kiwi. So that may sound odd if you haven't taken any of these courses before or dove into XLAs, but watermelon is something I feel like a lot of us are seeing: Our SLAs are all green, but we're still hearing those rumors that, that experience isn't good. It didn't feel good. So I think that's what a lot of companies are seeing right now. And we really need to make sure that we're reporting what we're hearing. And at the end of the day, a kiwi where it's green on the outside and on the inside, that those metrics are measuring what we're looking to do here as a customer experience team.

Weston Morris:

Well, it sounds like you've got some great programs at Invesco and I look forward to hearing more about your XLA experience in the future. Ashley, thanks so much.

Ashley LeFort :

Awesome. Thank you.

Weston Morris:

Well, my next guests for this episode both came from quite a bit further south than Ashley. I'm speaking here with two gentlemen from HDI Brazil. Thiago de Marco, e tambem, Felipe Coêlho.

Thiago de Marco:

Perfect.

Weston Morris:

Muito prazer. So I'm happy to have you here. I have a few questions, I think, very specifically about what's going on with experience management in Brazil. I know sometimes when I talk with the analysts, they have a view that, you know, Latin America is maybe a little bit slower on this journey towards experience management. But when I hear you in the classes here, at HDI, I am hearing a passion and an energy that you are representing for Brazil that tells me there's something going on in Brazil about experience management. So maybe you can tell me what's going on in Latin America.

Thiago de Marco:

First of all, thank you for the invitation. We're really honored to be here on your podcast. And about experience, what you can see, the people are really looking for that as a competitive differentiation to actually make the business more stable in the long term. So everybody's actually, especially the more mature companies, they're really talking about that. What we lack still in the market is some methodologies. We don't have the right tools still. It feels like the Brazilians have the intention, the conscience, the importance of that. But we don't have a methodology and a structure to actually put that on road. You know, that's the thing that we don't have still, but I think the mindset's really changing quickly, and the companies are actually moving to the experience in the center of their strategy for the business, you know?

Weston Morris:

Well, that's very exciting. And I see that actually, what you're describing is not unique to Brazil. There's this desire everywhere to better understand experience management. And is there a methodology or is this just, you know, is this another marketing trend? You know, something like that.

Felipe Coêlho:

Some new title that people are inventing or something? It's not, it's real. But one thing that I wanna compliment, a success, is that in Brazil I think we have the DNA of the experience because people are really warm to talk to each other. They like to be a service provider. Okay, we don't have all the tools, if you compare to other more robust economies, let's say, but in Brazil we have the wish. People wish to do a better service. That is the DNA of the Brazilian people that like to talk, to be warm with each other. So I think this is the reason that experience could be really... goes really fast down there once we have a science, a methodology, some guidance. So I think they can follow and be fast on it and get mature on it I think.

Weston Morris:

You touched a little bit about what is unique about Brazil, you know, the culture, the warmth of the people. How does that translate to the businesses? And you know, what is really unique about business in Brazil, as opposed to the rest of the world that lends itself towards, you know, experience management?

Thiago de Marco:

I think we have a barrier, that's the economy of Brazil. It seems different from Europe or the United States, the companies. I think they can look for a long-term strategy cause the economy is more stable. They can actually look for the profit, and the timeline or timeframe in a more stable view. In Brazil, the economy actually goes up and down all the time, it depends on the president. The governments really have a strong role on the economy's performance. So I think one of the problems we have is expecting the companies to invest in experience, to look for experience using tools or even changing process or trading people. I think it is the financial issue, you know, that the margins are all over, the economy's not that strong. We don't have the scale, the market that Europeans and the Americans have.

Thiago de Marco:

So I think that's a problem. That's a unique problem we have there. That the companies who are looking for, actually exploring the experience consultancy or tools or something like that, has to look to Brazil and say, okay, they are a third-world country economy. They don't actually have the money. Or, I don't have the money. Even having the conscience and the wish, the desire to invest on that. That's a problem. The second one I think is the schools. So we have a really, really...problem of lack of training on the ability to use math, on analyzing data, analyzing numbers. And since experience is a lot about talking to people, getting data, putting together, getting data from different origins and mining that, so you can actually digest that and take some actions based on numbers. I think we have a problem of people not having the ability to actually analyze graphics and numbers and data and these kind of things, you know. Like the logical thinking of the theme, they need to learn that in school. We have few professionals in the market that actually can do that. It's different from Europe and America that have good schools and can have more of the workforce focused on that.

Thiago de Marco:

In Brazil we have both these problems, I think economically and the school background, the schools' basic training on math and logic, these kinds of things.

Felipe Coêlho:

And the outcome of all this, we're talking about experience here and the outcome is bad. Right? We, in the end, have this lack of abilities, skills, to make it to the next level, to get there. For example, in other countries we see it happening cause they have a plan of education. So I think we suffer with that for sure.

Weston Morris:

And maybe I could dig down a little bit deeper. In terms of the industries, are you seeing one industry versus another being more ready to adopt experience management, more hungry for it? What do you see?

Thiago de Marco:

For sure, especially when you look for the digital services like food delivery, eCommerce in general, they actually, I think...manage the numbers and how they experience, especially their software, their apps, delivery for the people, you know... I think they are more advanced than the rest of the industry. So I would say FinTech banks, the financial services, especially these small banks - they are more digital than the big ones, which are still looking for branches and people are going there taking money from the ATM or something. And we have now in Brazil a wave of small banks. The bank is an app, you know, it's not a real bank. So they are really looking for experience. They are attracting people, especially. And I have an experience at home. My brother went out from a big industry, the biggest industry in the world for a product - I can't say - but he went to a small bank because the experience of working there and delivering a better experience for the customers made him more happy.

Thiago de Marco:

It was a pleasure to work there, you know? So I can say digital services in general, especially commerce and food delivery apps and stuff, they use small banks. I think they are the ones that are advanced on this experience, investment and thinking mindset.

Felipe Coêlho:

Yeah. Well, the thing is that they are all for the most part software companies, right. And even the banks are almost software companies nowadays <laugh> and in the background they have other software companies providing service for them, which are worried about experience as well. Yes. So it's a whole chain of software worrying about it. So they look to experience...so bad. We have a group called SAB, a software advisory board, it's our advisory board where we just talk about software support and software services. And these guys are so advanced in this subject of experience. So we can see that in practice happening.

Weston Morris:

Yeah. I can relate to that. I think here in the United States, you know, globally, really - the pandemic - any industry that has frontline workers that are closely connected with the customers. That's one thing I hear you saying is the industries that already are thinking about customer experience are the ones that are ready to start thinking about employee experience. And I fully agree with that. So here at the HDI conference, you've gone through the training, the session on XLA experience management, you know,

how to develop XLAs and things like that. I'm just curious what you're gonna take back to Brazil and what exciting things you are anticipating happening with your customers as you help them build out experience management in Brazil?

Thiago de Marco:

I think we have a framework now, you know, the exciting thing is we have a methodology. We know what an XLA is now. We know how actually to relate the outcomes of the business with the operational indicators. And I think that we are now connecting the outcomes for the business, the employee experience with actually our IT services. You know, we have a good part of our revenue comes from IT companies that are not software. They are outsourced like Unisys and everybody is looking for how we connect these outcomes of the business of our customers with our daily operation. So now we have a framework and we have a methodology and we can take to Brazil some concrete...we are really excited about that. And probably our customers are looking on our blog the next week for that.

Felipe Coêlho:

Yeah. So, and it is nice because we've been working on this subject for two years in Brazil in our podcast and our blog, talking about it in advisory board meetings all the time. But without something structured like this, the conversation ends at some point. We have some actions happen in the companies, but when we start to say, okay, but how to do that and how to do this. And at a certain point they say, okay, I don't have an answer anymore. I do that. I focus on the people, I map my journey, I see my touch points and that's it. And so now we can connect it with the business outcomes, as you said, which is awesome. So now we have, in my point of view of communication and sales and everything, we can move forward with the product. So, it's so good, the XLA trend.

Weston Morris:

Felipe, Tiago, muito obrigado pelo seu ajuda. Espero que voce vai ter bem sucesso em futuro.

Felipe Coêlho:

Esto muito obrigado pela oportunidade. Thanks for the opportunity.

Thiago de Marco:

We appreciate it, thank you for having us participate in your podcast. Thanks a lot.

Weston Morris:

My next conversation was with Orian Mendes from TSO, which just announced that it has signed up to be the official publisher of all the XLA training materials that XLA Collab has produced. Now, she says it's clear to them that XLA experience management is not just a trend that's gonna fade away anytime soon.

Orian Mendes:

Well, TSO is a dynamic publisher because we're producing practical guidance for the evolving workplace, we are addressing the need that we are spotting in the market because we're well known for covering all sorts of guidance and , training assets and knowledge repositories, you know, from various sectors of best practice. What we are noticing now is that there is a movement towards experience. And we're seeing that people's expectations have changed and tool vendors and companies themselves are responding to that change. We can see the way that tool vendors are adjusting the way that their tools

work, which is really compensating for this increased demand for experience. Companies also are having to adjust the way that they're working because their employees and their customers are demanding more. Experience is definitely driving change, post pandemic. A lot of expectations have shifted. And it's important that we, as a publisher, recognize that and have the tools as in knowledge, tools as in, what do I do with this problem that I'm experiencing? How do I get my employees to feel that we are addressing their needs and their expectations? Because experience, isn't just about an end result. It's a symptom, it's the whole thing beginning right to the end. So as that demand grows, we've gotta adjust and make sure that we are providing the mechanism to make it worthwhile.

Weston Morris:

Now, Orian, this is a new trend. I mean, we can go back maybe a couple years. And I think HDI Conference probably had very little two or three years ago on experience. We just see it grow and grow, and we're seeing it with our customers as well. Any new thing, there's a risk that, you know, the early adopters may not get the promised results, you know, the whole hype cycle thing, that there's a promise of a big ROI. What are some reasons that you see that maybe some companies are failing in their efforts to implement XLA and experience management?

Orian Mendes:

Well, there's a few reasons there. The first, I think is expectation of the business because what they do is they say, oh, we have to address problem X. Oh, here's the remedy Y and they think it's job done. But that doesn't work, right? Because it's a lot more complex. You gotta understand the very reasons why you're implementing whatever framework you're putting into your business. You've gotta also work with guidance that is tried and tested. So that that's one of the things TSO is known for is that best practice. So we want to make sure that there is something coming out that is repeatable and distributable. So it's something that people can really rely on and claim to say, this is best practice, this is something we can apply. But because experience is quite new, we are also very conscious that people need to be on the same page.

Orian Mendes:

It's difficult to be on the same page if you're not educated to be on the same page. So we've invested our time and resources to help XLA Collab construct this content into something that is deliverable as a training course. Um, there is a need for training. If you don't tell your staff what it is, why you're doing that, how it's going to impact them, what are the goals, objectives, and how do you actually make this thing work? You're gonna get diverse results. You've really gotta be fully focused on making sure that everyone is on the same page. And that's, that's one of the reasons why we've invested in the training. So sometimes the driver for why experience is put into the business- and I think this is the other reason - is they will focus on it as a cost saving. We got this new shiny silver bullet that's gonna solve all our problems, and it's gonna save us a bunch of money. You know, we invest so much and we'll save so much. It's a line on a balance sheet or, you know, a couple of paragraphs in the year-end statement, but it should be a lot more than that. Whatever improvements you're making on your business, on a operational level, even on a strategic level, all of that should always come back to how am I growing my business? How am I increasing the revenue? I keeping my employees happy? And it seems like a trivial word, but how are my employees feeling about being at work? Do they buy into the business that we're running? Is it that they fully invested in the way that they're working? Because that's what experience really is.

Orian Mendes:

That's the heart of it. So if your employees are satisfied and are pulling the same weight as the rest of the organization, because the experience is a positive one or an improving one, because it doesn't always have to be like an overnight switch they flip. Even if they sense that there's a current pulling them towards a better future for the business and they're part of it, that employee engagement is really quite significant. So keeping employees satisfied, positive, engaged is a big factor then in the ultimate revenue owner, which is your end customer. So if you don't keep your own customer, if your end customer picks up that sense of disdain from your staff, it affects your bottom line. And then suddenly, oh, you know, that cost saving out on your balance sheet? Well, you've just created a circle of death.

Orian Mendes:

You know, that vicious spiral that just takes you down and down. People become unhappy, they've become dissatisfied, disengaged. You have employees leave and then it just creates a worse experience for your customers. And then it just continues to drill down and put a hole in your pocket, in your bottom line. And then you've got a serious problem. So what we are talking about here is building positive content that's leading people upwards. So what we wanna make sure we are doing, we are here to serve the needs of the industry and providing content that was rich and enriching full businesses. It's not just, you know, well written, well presented. It has to be providing ultimate value for businesses and ultimately customers because who doesn't wanna do things better, right?

Weston Morris:

<affirmative> Orian, for our audience, you've actually just revealed, I think, a very important aspect of experience management that we've learned here through XLA Collab and at the HDI conference. And that is that experience isn't how happy I was with the last service desk call or service desk ticket. It's really a much bigger picture. It's the overall experience in my work and am I feeling fulfilled? And that's a real challenge to be able to capture that. It's a big change for CIOs to be thinking about. So anyway, I'm so glad you've got this training material and it'll be able to make a real difference in people using it. Thanks so much for, joining me on my podcast.

Orian Mendes:

Thanks for the invite, it's been lovely to meet you.

Weston Morris:

The last conversation that I'd like to share with you comes from the healthcare industry. And in this conversation, it really became clear to me that experience management is absolutely critical in healthcare.

Weston Morris:

I'm here at the HDI support world live conference in Las Vegas, Nevada. I'm speaking with Devin Studstill who manages the service desk for WellStar Health System in Atlanta. Welcome to the podcast, Devin.

Devin Studstill:

Hi Weston. Thank you for having me, I'm excited to be speaking with you.

Weston Morris:

You know, at this conference, we have heard a ton about XLAs and experience management, I think like never before. And you and I had a great conversation yesterday about how important that is for you. So I'm just curious if you'd mind sharing with the audience. Why is it you feel that XLAs and experience management are so important in your role in thinking about service desk and especially in the healthcare system?

Devin Studstill:

Absolutely. So XLA and experience management is critical to what we do because of the nature of the business that we support. Doctors and nurses are individuals, that especially over the past two years, have really gone through a lot of stress, ups and downs. And the experience that they get calling into my center is very important to me, and making sure they leave that call, knowing that we did everything that we could to support them and get them back to their regular jobs is great.

Weston Morris:

I love that, Devin. And in fact, I remember something you said yesterday, you're thinking about, you know, wait time for a doctor, you know, if that goes from five minutes down to 30 seconds, that's actually someone's life possibly that's in the balance. I mean, that's just so awesome. So the second question I have for you Devin is, you know, we're nearing the end of the conference here, we've absorbed a ton of stuff. Is there one or two takeaways that you're thinking of? You're thinking, wow, that is something that I can see as really making a difference in your healthcare system.

Devin Studstill:

Yeah. Great question. I would say that the light really shined yesterday during one of the speaker's presentations. It was more focused on the employees themselves and creating an environment that is positive for them, which then creates an environment that's positive for our internal customers, which then creates another positive environment for customers. So, you know, one of the slides she had, it said, happy employees equals a happy company. Which then equals a happy customer, which is key. And by happy customer, that is saving the life of an individual, then that that's important to me.

Weston Morris:

That's awesome. I love how you are connecting your experience that you're giving, you know, to your employees through the service desk, realizing that that connects all the way to the doctors and then all the way to the patients. So we're nearing the end of the conference here, Devin, and I'm curious as to, you know, do you have an aha moment relating to XLA and experience management, especially, you know, in the context of the great work your company does in saving lives.

Devin Studstill:

Yeah. Great question Weston. The biggest takeaway from the conference is really going back and focusing more on our people at the service desk level. This is where the rubber meets the road for IT. And the experience that my team as leaders gives to our employees directly impacts the service that we provide to our customers internally and externally. So the focus is going to be re-engaging, making sure that we are communicating and encouraging. And as I mentioned yesterday, we're cheering for our team to do a great job each and every call. One of the welfare models is providing world-class healthcare every time. And every call that we take to support the individuals that are supporting that effort is extremely important.

Weston Morris:

Well Devin that's beautiful. I really appreciate you giving me a few minutes here to share your thoughts about the conference.

Devin Studstill:

Thank you for having me.

Weston Morris:

Well, I went to the conference anticipating a growing interest in employee experience management, but I tell you, I was blown away by the level of excitement, the desire to learn more, the questions about how to actually implement XLAs in the real world. The questions about how to get value from them. I mean, I am seeing amongst every industry, clearly that there is a belief that improving employee experience will improve a company's ability to attract talent, to retain talent. It is a key to improved engagement by a happy workforce. And then all of this leading to an improved customer experience. And as a result, an improvement of the company's bottom line.

Weston Morris:

I'd really like to thank all of my guests in this special episode for taking the time to share their vision with me, Ashley Lefort of Invesco of Prince Edward Island, Canada; Thiago de Marco and Felipe Coêlho of HDI Brazil,; Orian Mendes of TSO publishing in the UK; Devin Studstill of WellStar Health System in Atlanta, and of course, Brittany Fox working behind the scenes to make the HDI SupportWorld Conference possible. If you're interested in attending next year's SupportWorld Live, you can go to HDIconference.com. This is the digital workplace, deep dive. I'm your host Weston Morris. Thanks for listening.