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We're Live, What's Next? Strategies for Fusion Lifecycle Support and Improvement.

Jayna Vroman
D3 Technologies

Darren Hartenstein
D3 Technologies

Learning Objectives

- Learn why proper product support is a key to its overall success.
- Learn how to create a plan for continual improvement based on user feedback and immediate enterprise needs.
- Learn how to design an effective support process.
- Learn how to employ lessons learned to drive better support and user relations.

Description

The Fusion Lifecycle implementation has been finalized and your users are navigating the system—so what's next? How do you handle managing the ongoing support requirements and demands from your users for new features or issues? Whether this is a new or mature tenant, ignoring and remaining complacent in acknowledging and managing those requests for support may lead to adoption challenges and grievances with the system. In this class, we will cover the creation and administration of such a process, and share lessons learned from case studies on how this process is working for customer tenants today.

Speaker(s)

As a PLM implementation consultant and administrator, Jayna Vroman has quickly worked to prove herself in this up and coming part of the industry. Administrating a 400+ user Fusion Lifecycle environment, her steady approach to support and improvements leads to large gains in overall enterprise customer success in adopting and improving their PLM solution. She works closely with the customer, solution architect and project manager to ensure customer priorities are being met efficiently and effectively through user support and managing weekly feature releases to the tenant she services. Her past work in the customer service, non-profit and even mining industries leads her to be customer minded but technically astute. When she is not busy supporting enterprise FLC customers, Jayna enjoys cycling, hiking, teaching fitness classes at her local gym, mentoring, and keeping up with her young and lively family.

Introduction

Fusion Lifecycle is an extremely customizable cloud-based software; perfect for automating and simplifying a product lifecycle process for those in manufacturing and beyond. This software allows businesses to capture their current product lifecycle process and customize the existing out of the box options of Fusion Lifecycle to best fit current and future processes. The customizable base model allows for each customer's instance or tenant to often be widely different from the next.

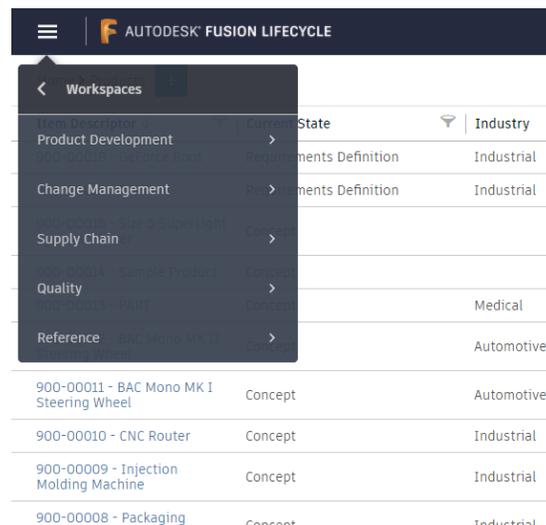
When it comes to supporting such a customizable software, where the underlying technology may be the same but each of customers' setups are quite different, supporting such a system can be quite a challenge. Each customer will have differences ranging from small to great in scale. Therefore, on some level support must be individualized on a customer by customer basis.

The Support Dilemma

Unlike some of the software types that Autodesk has created this software is not easily supported by support teams that can help stuck users with their overall experience. Although, that is sometimes the case. Often, though to support the Fusion Lifecycle of an individual company or customer there is likely to be a knowledge barrier. This is not an impenetrable wall but will take some discovery or training time to know the individual system well enough to make good suggestions or informed data updates.

Supporting Change

As cannot be overstated with this software the ability to adapt and change the product lifecycle of a company over time within the system is remarkable. Support comes into play in this aspect in that the input of users over time can eventually lead to improvements in the overall process. That is with enough acknowledgement of upper management, many of whom will use the system as well. When a pitfall or overcomplication is identified it can be remedied or removed from the system with promptness. Thus, making the user experience more pleasant and the process leaner.



Just one of the many ways workspaces might be aligned.

Why Proper Product Support is a Key to its Overall Success

The overall key to adoption in Fusion Lifecycle is getting the users properly acquainted and confident of their processes in this or any new system. The processes shouldn't be terribly different from what they are used to working with but the format and configuration might take a while for them to adapt. In the meantime, they might make mistakes, come across a discrepancy in one of the workflows or have trouble adapting to the reporting. While that list is not exhaustive, all those things can and are likely to occur.

Supporting Adoption

During a typical implementation process the workspaces are created or adjusted to fit the customer's current or desired processes. Once the implementation work is completed the users or a selected subsection are then asked to take the software setup to task in a typical user acceptance testing round. While these sorts of testing setups seem to really beat up the soon to be released workspaces or updates, they don't always catch everything nor do they prepare the everyday user completely for working within their new Fusion Lifecycle system. Other steps such as training sessions, work instructions, or lunch and learns do lead the users to have better exposure and knowledge of the system. However, there are still likely to be items that were overlooked in the testing or training that will cause difficulties for the users.

Implementation

Using product support from the very beginning, even through the implementation stages, can lead to a better user acceptance over time, because the user will be a part of the configuration process in a larger way. Whether this is the first workspace in a new tenant, a quick update, or an overhaul of existing processes, allowing the customers an outlet to list requirements, log user stories, or document test findings, bugs, or change requests will allow them to be more involved and immersed in the process and outcomes of the new system. These logs will be a sort of living record, which will lead to a very full and traceable scope requirements list. Tracing such things as scope change and/or creep.

Not only that, but it will get them acquainted with the support platform chosen to support the product going forward, aligning them with the end goal of that implementation. Nothing could better for an implementation in the long run than users that are fully invested in the product being configured.

Tweaking Processes

Some of the difficulties that users will face have to do with having the system really fit their use case(s). What worked on paper, literally sometimes, does not always work in a fully automated system of handoffs. There may be a need to add attachments, or the need to eliminate them completely. Sometimes the support is needed while the users are using/testing a working version of the system. This might have bugs or corner cases that were not captured inside of the initial user case studies. Though often there are

aspects of the system that lead the processes to change and evolve over time as the users get used to the system and are able to see where aspects of the system are under or over used.

Mistakes Do Happen

Once the tenant is up and running and users are finally taking part in the built processes it is very likely that they will run into snags along the way. Data might be incorrectly entered, or workflows might be incorrectly or prematurely selected, leading to bad data or record states. Without a system in place for support that bad data could be left to spread throughout the system or cause significant frustration and dissatisfaction with the newly implemented FLC tenant. Quickly corrected data leads to a cleaner system and a more contented user base.

Having a system in place to receive all the requests for assistance that come in, allows the users and administrators an easier path to problem resolution and sets clear expectations about how the problems/grievance processes will work out long term. Ultimately getting the client/users up and using a support system earlier in the process helps them to acclimate to the new system sooner.

Learn How to Create a Plan for Continual Improvement Based on User Feedback and Immediate Enterprise Needs

The support system sets up the users to feed the administrators of the Fusion Lifecycle system valuable feedback that eventually leads to system improvements. Being able to log all the bugs, missteps, and pain that the users are feeling gives a good baseline for what changes may be needed in the long run. This log provides a clearer picture of what is necessary and helps those working on the continual improvement of the system to establish a map for future development work.

Bugs and Missteps

While any user might make mistakes and create bad data in any system it is important to look for correlations in this data. Are a significant number of users facing this issue? Has this bad data issue continued past the initial launch point for this implementation? Is this user issue or is it really a clarity issue that pertains to setup or workspace configuration? Bad data and mistakes happen in any system but if they can be prevented, they probably should be. Based on the compiled information there is likely to be a clearer picture of if the repeated error has to do with user training or if something in the process is not clear and needs to be cleaned up.

Thankfully, based on the compiling of data on these errors, that information can be assessed, and changes can be made to better support the users. Slowly though these accumulated data points that are left behind by the ticket log that is created, might just lead to an evolution of the process itself.

Process Improvement

As most working in industry know, processes evolve as companies, people, and technologies grow. Fusion Lifecycle is positioned to change and grow as the processes are growing and changing to meet the new ideas and practices of a company. The support system works as a net, not just for data updates and bugs, but also for improvement requests.

Catching all or most new ideas for improvements and new workspaces inside the support system leads to a complete inheritance tree. This inheritance tree that is created via this process contains all the ideas, whether they make the cut or not, and requirements for the future implementations and improvements to the system. Ultimately, they become the test cases for if a new project or implementation meets the criteria set forth at the outset. Once the tickets are done the project/implementation is done. This clear picture of what a project or implementation is supposed to be sets a distinct marker that makes scope change traceability possible and likely. And who does not like that?

How to Design an Effective Support Process

So, if a support system is necessary, how should it be done? Is there a clear path for everyone? From the lessons learned over the last couple of years that D3 Technologies has supported various customers with their Fusion Lifecycle tenants, it is clear that the answer isn't cut and dry. Support setup is really dependent on the maturity of a customer's IT department, the size of their tenant and how complicated their tenant has become.

Inside or Outside Support?

Let's first explore if the support for a tenant should be handled inside or outside of a customer's Fusion Lifecycle tenant. There are several pros and cons for each side of this argument and we've seen it work well or poorly on each count. As alluded to earlier it really depends on a number of factors, but either way what is most important is that in the long run there is some customer or user ownership of the support process that will take place.

The biggest question is, is there a mature IT department with a support system already in place and will this department be supporting the new software? If the answer is yes, inside support might not be the right answer. But let us explore that a little more.

Inside Support

When referring to inside support, what we mean is implementing a workspace or workspaces that are dedicated to support within the Fusion Lifecycle tenant. This means creating a workflow and form that would work best to fit the user stories of the customer. At D3 Technologies we have been able to create a workflow that more or less fits the general needs of users inside Fusion Lifecycle. Just like any other workspace inside FLC, it can evolve over time and better fit the customers. It starts with a basic triage state, moves through in process states, has options for collecting more detail, allows tickets to be collected for project use, and finally leads to a completed or canceled state. Customer to customer those states may differ some and include notification. Tickets submitted require identification of the workspace, type of issue, priority level and brief

description of the issues being faced. Being inside the system is very useful for users that work in the system day in and day out.

However, there is pain in this too. If the customer is unable or unwilling to, in some way, maintain ownership of this workspace at some level, it leads to more user reliance on the reseller or implementation team. Ultimately, this or any other support system needs to have some sort of handoff process, some sort of validation of the issues. Obviously, this is important to resellers because of time allocation issues. But this could also be equally important for a company's business intelligence department. No one wants to get an urgent ticket for change to the system configuration and find that the user was undertrained, or it was just a browser issue. Therefore, if a company has a mature IT support process it may be best to stick to that one model and just train the IT department on Fusion Lifecycle innerworkings.

Outside Support

Support outside of the system might mean using a homegrown option that the company is already using, but more likely it would mean using a different platform that the IT department already uses and has a grasp on. For some that might mean using something like Jira where cards are logged and moved along through placeholders until completion. This sort of ticketing provides plenty of visibility and allows the users the ability to be very involved with the support process; much like what is attempting to be achieved through an inside support workspace within the FLC tenant.

Since the point of the support for this type of system is not just correcting bugs and user errors, but continuous improvement, having visibility in the ticketing process is very important and can lead to a better understanding of the issues facing the users. Lots of headaches in this sort of process, but a ton of value in the end.

How to Employ Lessons Learned to Drive Better Support and User Relations

At this point the last learning objective might seem redundant since it has been hinted at this whole time. Expect change, plan for change, and use the data collected to drive that change. Learning from the support tickets, aggregating them, prioritizing them according to business needs will best benefit the company. However, this will not happen by accident.

Plan for Process Improvement

Anticipating the need to evolve is going to lead to a different way of thinking about tickets that come into any support system. Categorizing, tracking, and reporting on them will lead to less pain in the long term and quicker, more complete fixes of 'small' issues. Actively looking to increase the value of the system and flush any noise that might be causing user dissatisfaction. If the users know that the goal of the support system is to improve the Fusion Lifecycle tenant, the tickets might just increase, but the outflowing of ideas and transparency will be well worth the headache.

Transactional Support

Support needs to be transactional at its' core because as is observable with emails and calls there a definite chance for those interactions to not be clear and consistent in the information provided. Avoid at all costs having more than one or two integrated systems in place for handing support. Even if it seems faster, or easier something will be missed by answering every email or call that comes in. Tickets won't be created and therefore reportable, unless the support administrator creates them afterwards, or during the interaction. Maybe unlikely, right? Or tickets that are coming into the support system may be delayed due to the push in from these other sources.

Keeping the support transaction clear and consist will lead to less noise and more great data. Data that drives changes and adoption of this fantastic software.

Conclusion

The customizability of Fusion Lifecycle brings with itself room for so much process innovation. The potential needs to be harnessed and used in an appropriate way. Bringing a support system into the toolbox used with Fusion Lifecycle will bring forth a considerable amount of value to tenant users in the present and future. Compiling and harnessing the data that comes from this support with drive a better, more vibrant, and even leaner system. A system that the users will have considerable buy in value with and have adapted.