CLIENT SUCCESS CENTER

DEMO AND DISCUSSION OF OUR NEW TOOL

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AGENDA

- Overview of the new Client Success Center
  - Why now?
  - What are the benefits?
  - What will it be exactly?
  - When can you start using it?
- Demo
- Discussion & Feedback
  - Future opportunities leveraging the Success Center

CLIENT SUCCESS & SUPPORT PHILOSOPHY

As the first line of contact for any issue in the day-to-day operations of our clients, we strive for **continuous improvement** in the areas of expertise, response time and client satisfaction.

OBJECTIVES

- Be passionate about client success
- Provide knowledgeable, timely and professional support
- Achieve high levels of client satisfaction
- Engage members of the Mitratech community
- Share our knowledge internally and externally

WE ARE INVESTING INTERNALLY TO HELP YOU

Dedicated product line managers
Escalation points for any issues

20% growth in team size globally

Client Success Portal
Enhancements coming throughout 2017

Global presence in order to continue to scale

Maintenance-focused development team

WHAT IS THE CLIENT SUCCESS CENTER?

- Located at: https://success.mitratech.com/
- Upgrade and expansion of our online portal which some clients are already using for managing support tickets which will include:
    - End user and admin documentation
    - Knowledge base articles and videos
    - FAQs, recorded webinars and other company updates
- Intent is to be highly searchable, intuitive and easy to use – **but we need your feedback**!
- Majority of content to be publicly available, no login required!
- Law firms and vendors now have new way to open tickets with Mitratech Support
- Integrated but separate from our existing Support Portal for ticket management
- Works on mobile, although not yet fully optimized

WHAT ARE THE TRENDS & BENEFITS?

Benefits for you:

- Majority of content searchable via Google
- Build SME across your team more quickly
- Resolve issues faster – if we are doing our jobs!
- No need to wait on support for common requests, how-tos and majority of documentation requests

Benefits for us:

- Usage analytics:
  - Identify content gaps by understanding what users are searching for, what is helpful and adoption of the success center
- Collect more information up front: ticket request forms and search history
- Better ability to focus on the most complex and impactful issues
- You are happier and more successful!

Trends

- Over 50% of customers think it's important to solve product issues themselves rather than rely on customer service. (Zendesk)
- 40% of customers prefer self-service to human contact. (Steven Van Belleghem)
- 70% of customers prefer to use a company's website to get answers to their questions rather than use phone or email. (Forrester)
- For US online adults, online forum/community use jumped from 31% in 2012 to 56% in 2015. (Forrester)

WHEN CAN YOU USE IT?

- Today: **Collaborati, GCD, Lawtrac, CMO** and to some extent **Viewabill**
- End of September: **TeamConnect** content is being rolled out as we speak, some is available today but the full content is being refined
- Late-October: **eCounsel and Secretariat** content
- November: **PolicyHub and DataStore DSX**

CLIENT SUCCESS CENTER

Topic hierarchy

How to Create a Report using Lawtrac Report Writer

A feature enabling users to create and save ad hoc reports

How to Add a New Law Firm to Lawtrac

Create a new Law Firm or Vendor record in Lawtrac before associating the record to a matter

How to Create a Predefined Matter Team

An administrator can create predefined matter teams to streamline matter creation for users

How to Add a New Legal Department User

As an administrator, create a new Lawtrac user and set their permissions

How to Create Front Screen Text Announcements

An administrator can display r
Screen Text

How to Add Summary Invoices to Lawtrac

route

How to Adjust Your

End Users can adjust Quick F
Invoices, and Firms

How to Route Docu

Use Routing Slips to create a

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2017 May - Lawtrac Report Writer

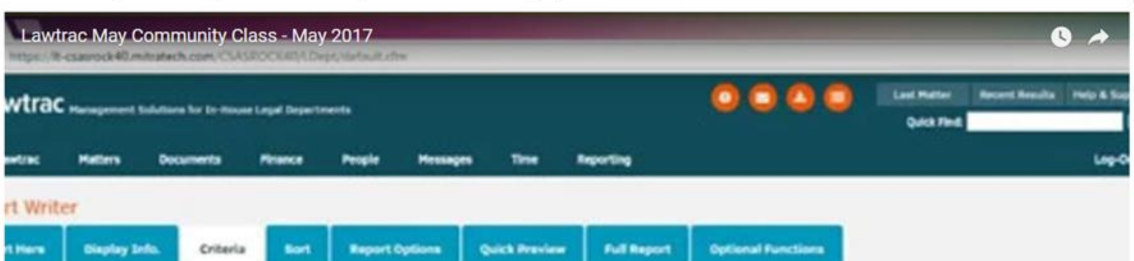
Last updated: 17:26, 19 Jul 2017

Webinar with end to end instruction on creating reports in Lawtrac

This community class is designed to showcase tips and tricks for creating reports.

– Table of contents

1. TIPS AND TRICKS



DEMO

FEEDBACK

FUTURE OF CLIENT SUCCESS CENTER

- In 2018 and beyond, we will be looking for new ways to leverage the success center and build out our online community:
  - Client-specific content to assist your specific end users; could include billing information for firms
  - Contextually aware in-application links
  - Community forum style Q&A
  - Chat based support offerings
  - Further mobile optimization
  - Web-based training resources

THANK YOU

PLEASE TAKE 5 MINUTES TO COMPLETE THE SESSION FEEDBACK FORM VIA THE MOBILE APP!

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