Working Together - Maximizing Value from Customer Care

Daniele Nottegar, Primo Regional Expert

Martin Büscher, Director Customer Care

Sabine Schmidt, Alma Subject Matter Expert
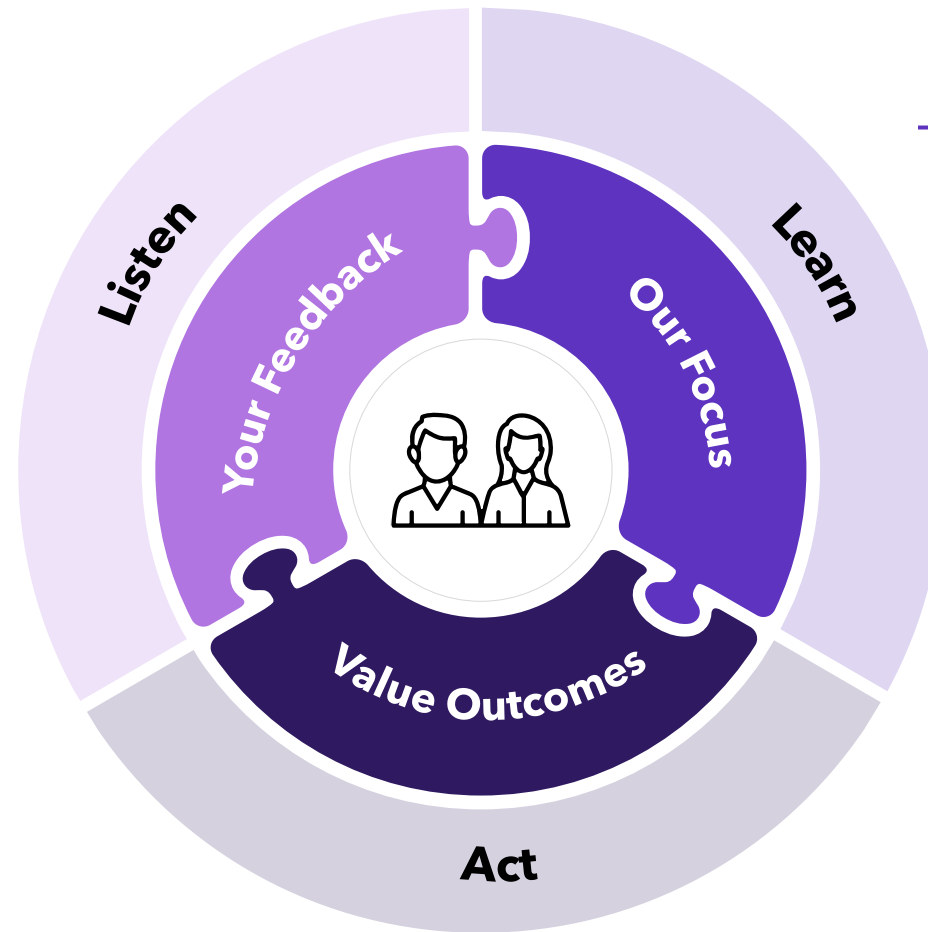
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Agenda

- **Optimal Team Structure**

- **Quality of Service**

- **Self Service Channels**

- **Community Collaboration**
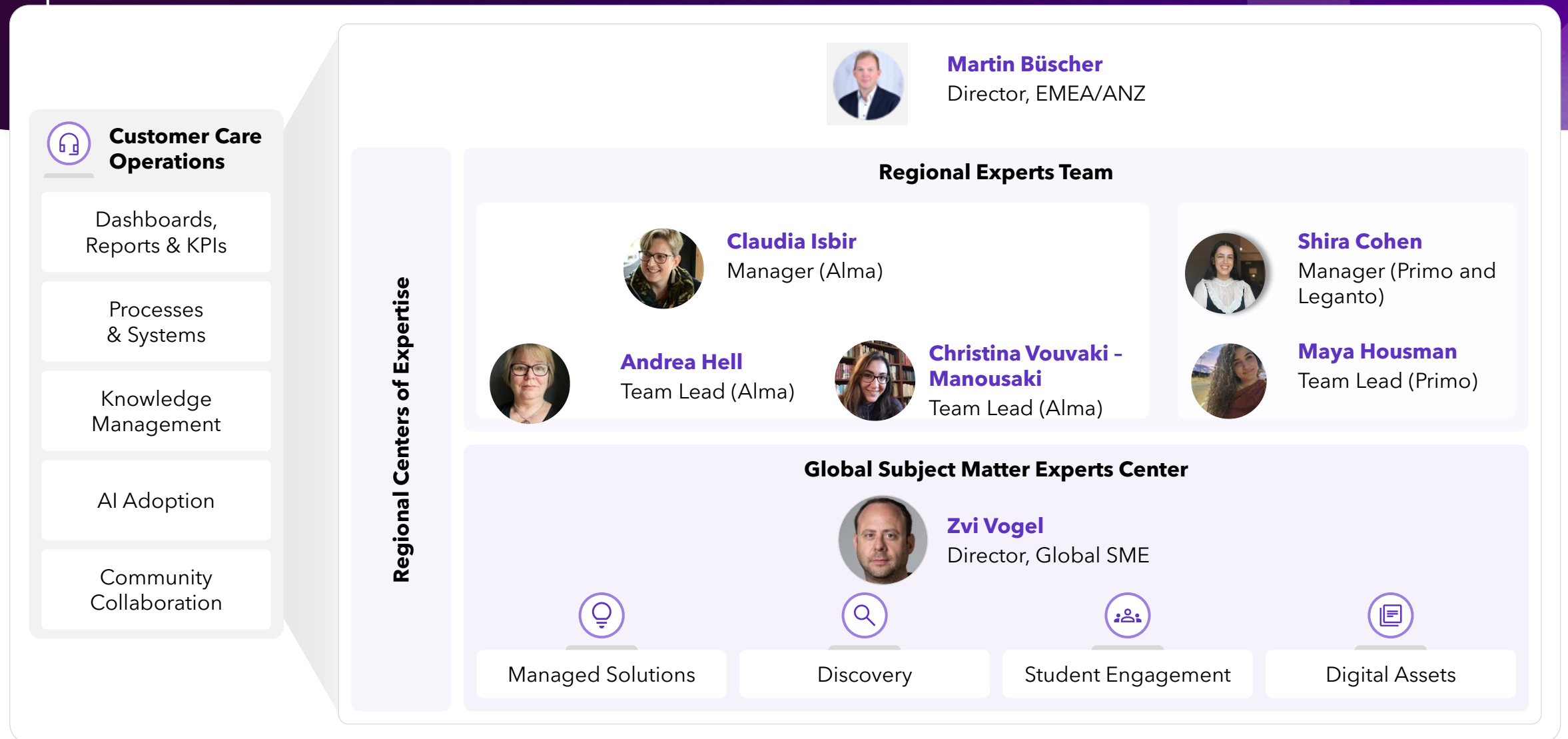
- **Wrap Up**

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Our Focus

Focus Areas
- **Optimal Team Structure**
- **Quality of Service**
- **Technology Adoption**
- **Self Service Channels**
- **Community Collaboration**

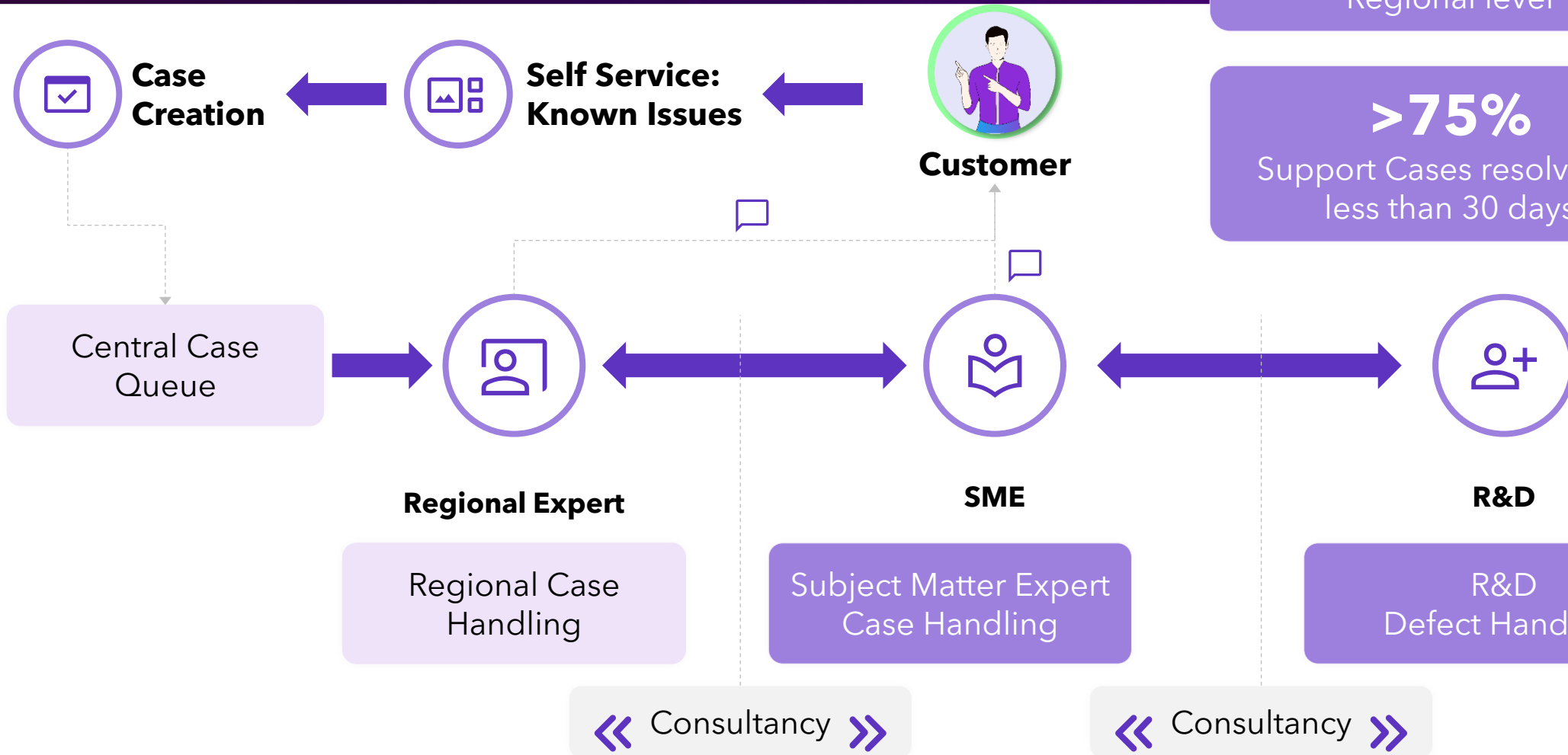Clarivate

EMEA/ANZ Regional Customer Care
Optimal Team Structure

Customer Care Operations

Dashboards, Reports & KPIs

Processes & Systems

Knowledge Management

AI Adoption

Community Collaboration

Martin Büscher
Director, EMEA/ANZ

Regional Centers of Expertise

Regional Experts Team

Claudia Isbir
Manager (Alma)

Shira Cohen
Manager (Primo and Leganto)

Andrea Hell
Team Lead (Alma)

Christina Vouvaki – Manousaki
Team Lead (Alma)

Maya Housman
Team Lead (Primo)

Global Subject Matter Experts Center

Zvi Vogel
Director, Global SME

Managed Solutions

Discovery

Student Engagement

Digital Assets

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Case Handling Process
Quality of Service

Case Creation

Self Service: Known Issues

Customer

Central Case Queue

Regional Expert

Regional Case Handling

SME

Subject Matter Expert Case Handling

R&D

R&D Defect Handling

Consultancy

Consultancy

>70%
Support Cases resolved on Regional level

>75%
Support Cases resolved in less than 30 days

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Meet Daniele and Sabine

Hear from the people behind your daily support experience

Daniele Nottegar

- Primo Regional Expert
- Joined Clarivate in 1991

Sabine Schmidt

- Alma Subject Matter Expert
- Joined Clarivate in 2019

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Your First Contact for Support Cases

Primo Regional Expert Team

- Most issues are resolved directly by us.

- We collaborate with Subject Matter Experts and Product Management for complex issues – either through consultancies or by transitioning cases.

- Help us to help you:
  Detailed case information (i.e. screenshots, screencasts, permalinks) will speed up resolution.

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Assisting You with Complex Issues

Alma Subject Matter Expert Team

- 3 specialized areas:

  - Resource Management
  - Fulfilment & Resource Sharing
  - Acquisitions & Analytics

- Our process:

Deep investigation and analysis	Direct resolution when feasible	Transfer to R&D with comprehensive information when needed

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Help Us To Help You

Survey Feedback

Surveys

- Management **read** the surveys

- We **recognize** positive feedback

- We investigate the "room for improvement" feedback

- **Comments are key**

- **Follow** up with the customer

- Investigate what to **improve**

- Monitor the average score

- We use surveys to track **satisfaction** rates at all levels

Help Us Improve!
Only 1 in 5 cases gets rated – your feedback helps us serve you better!

"Very helpful, quick answer to solve my problem asap! Thank you!"

English

How satisfied are you with your recent experience?

Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
○	○	○	○	○

How satisfied are you with the representative who assisted you?

Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
○	○	○	○	○

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Help Us To Help You

Escalation Policy

Your tool to signal that:
- The urgency of a case has changed, or
- You are not satisfied with the progress or handling of a case.

Escalation triggers additional review and prioritization by management.

New escalation categories added.

Escalation Policy is described in a <u>Knowledge Center Article.</u>

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Help Us To Help You

Resolving Cases Faster Together

How You Can Help

- Respond quickly to "Pending Customer"-cases.
- Let us know if the issue is resolved.

Results You'll See

- Faster case resolution.
- Less back-and-forth.
- More time to focus on what matters most for you.

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New Known Issues Portal
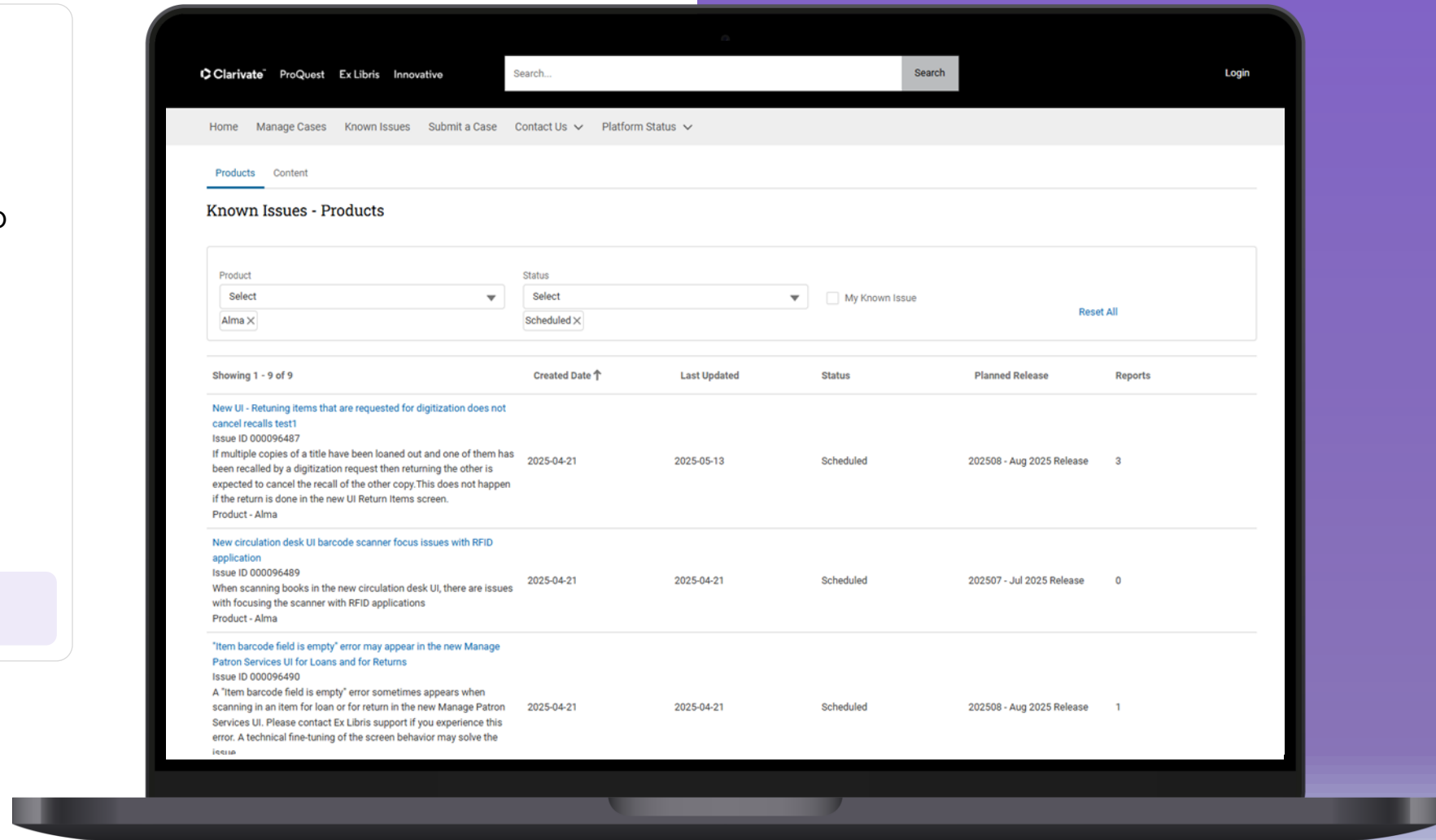Central Location, Full Transparency

Review

In collaboration with Support Advisory Group

Go to **Known Issues Portal**

New Known Issues Portal
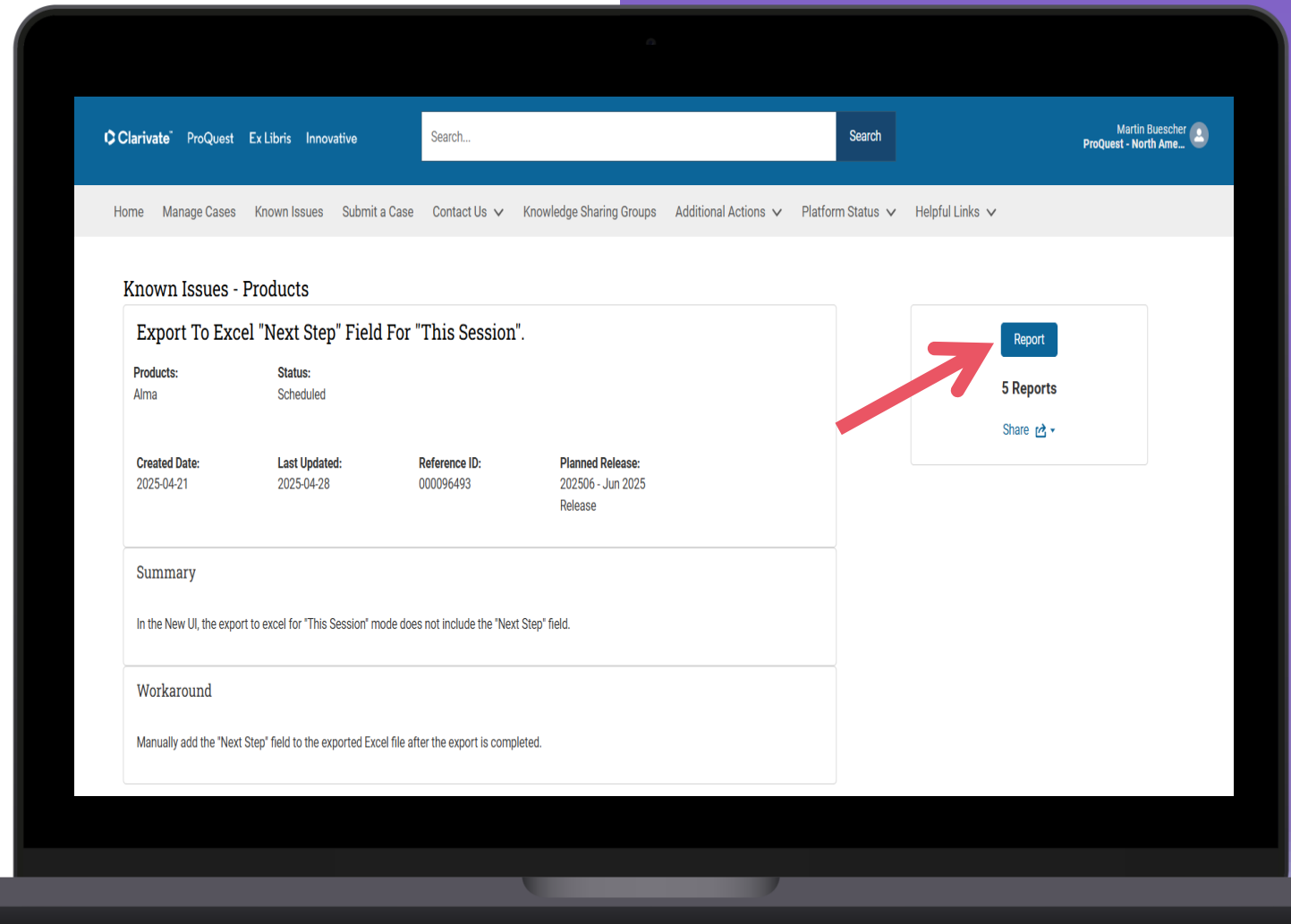Central Location, Full Transparency

👍 Subscribe

📋 Track issues

Go to **Known Issues Portal**

Clarivate ProQuest Ex Libris Innovative

Search... | Search

Martin Buescher
ProQuest - North Ame...

Home | Manage Cases | Known Issues | Submit a Case | Contact Us ⌄ | Knowledge Sharing Groups | Additional Actions ⌄ | Platform Status ⌄ | Helpful Links ⌄

Known Issues - Products

Export To Excel "Next Step" Field For "This Session".

Products:
Alma

Status:
Scheduled

Created Date:
2025-04-21

Last Updated:
2025-04-28

Reference ID:
000096493

Planned Release:
202506 - Jun 2025 Release

Report

5 Reports

Share 🔗 ⌄

Summary

In the New UI, the export to excel for "This Session" mode does not include the "Next Step" field.

Workaround

Manually add the "Next Step" field to the exported Excel file after the export is completed.

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Community Collaboration

IGeLU/ELUNA Support Advisory Group
- Monthly meeting cadence.
- Direct channel for community feedback.

National and Regional User Groups
- Active participation in user group meetings.
- Case submission via Support Center Account.

Other engagements with customers
- Ad-hoc discussions on individual cases.
- Analysis of case trends and patterns.

Your voice matters!

Take our 2-min survey now

Help us innovate
Your feedback drives the next generation of valuable solutions

See real impact
The improvements you experience today are direct results of feedback from customers like you

Shape the future
Help us prioritize improvements that will continue to add value to your work

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Thank You

Daniele Nottegar, Primo Regional Expert

Martin Büscher, Director Customer Care

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