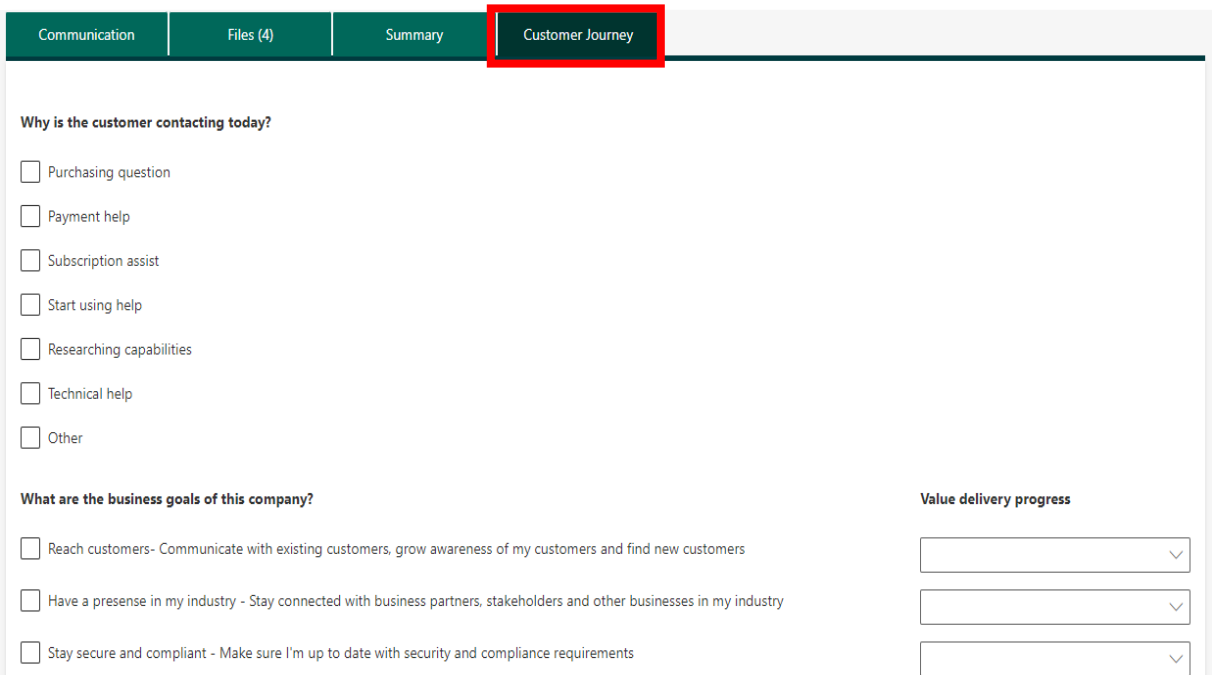


Purpose

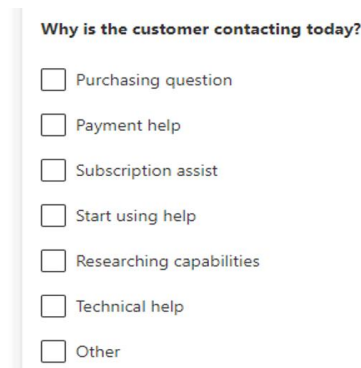
This document explains how to record information in RAVE using the Customer Journey tab. These steps are completed after the customer's issue is resolved and the ticket is closed and for Ghost tickets when customers abandon the chat. The information is then shared with Microsoft to improve the customer support experience.

1. Once in RAVE, navigate to the Customer Journey Tab.



The screenshot shows the RAVE interface with the 'Customer Journey' tab selected. The interface is divided into three main sections: 'Why is the customer contacting today?', 'What are the business goals of this company?', and 'Value delivery progress'. The 'Why is the customer contacting today?' section contains seven radio button options: Purchasing question, Payment help, Subscription assist, Start using help, Researching capabilities, Technical help, and Other. The 'What are the business goals of this company?' section contains three radio button options: Reach customers- Communicate with existing customers, grow awareness of my customers and find new customers; Have a presence in my industry - Stay connected with business partners, stakeholders and other businesses in my industry; and Stay secure and compliant - Make sure I'm up to date with security and compliance requirements. The 'Value delivery progress' section contains three dropdown menus.

2. For question 1: **Why is the customer contacting today?** Select the primary reason the customer opened a ticket. Select only **one** (1) choice.



This is a close-up of the 'Why is the customer contacting today?' section from the screenshot. It shows the title and the seven radio button options: Purchasing question, Payment help, Subscription assist, Start using help, Researching capabilities, Technical help, and Other.

Recording the Customer Journey

3. For question 2: **What are the business goals of this company?** Select **all** goals the customer would like to achieve that was discussed in chat or during phone conversations.

Note: Do **not** select any other options if *"Customer is not interested in talking about business goals"* is selected.

What are the business goals of this company?

- Reach customers- Communicate with existing customers, grow awareness of my customers and find new customers
- Have a presence in my industry - Stay connected with business partners, stakeholders and other businesses in my industry
- Stay secure and compliant - Make sure I'm up to date with security and compliance requirements
- Have a productive team - Collaborate with my team, recruit and manage team members
- Save time on business operations - Support the day to day activities of my business and stay organized
- Other
- Customer is not interested in talking about business needs

4. **Value delivery progress** refers to how far you got in the Value Guidance Experience for each of the goals you selected in step 3. From the drop down menu, select the correct choice using the scoring criteria listed below.

Value delivery progress

0 = Journey Not Started

1 = Journey Started

2 = Journey 50% complete

3 = Journey Complete

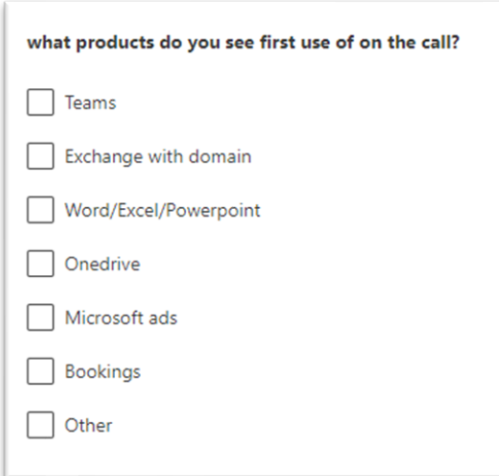
Score Criteria for each goal:

- 0= if you completed **zero** steps.
- 1= if you completed **less than 49%** of the steps.
- 2= if you completed **at least 50%** of the steps.
- 3= if you completed all (**100%**) recommended steps.

Recording the Customer Journey

5. For question 3: **What products do you see first use of on the call?** Select all products the customer used with you during the chat or call conversation.

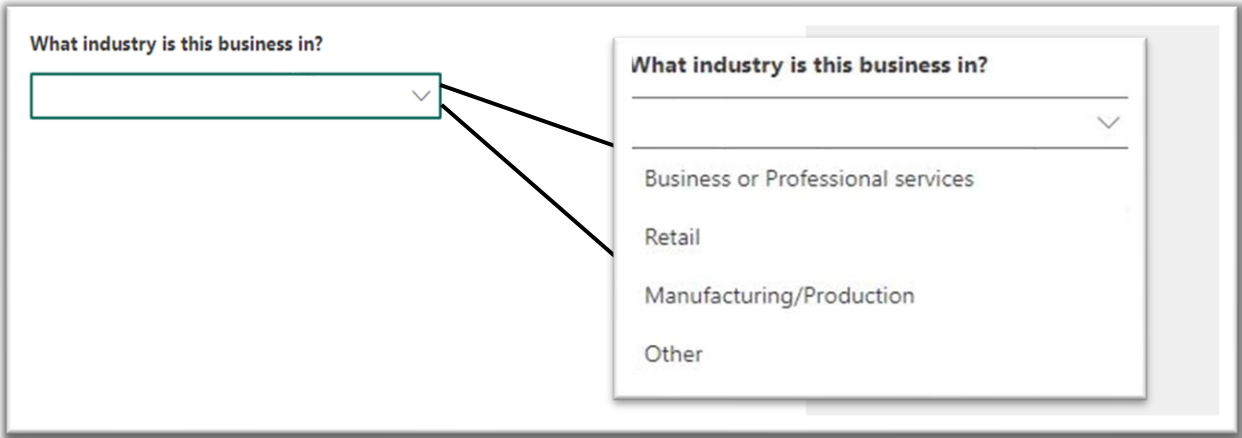
Note: This includes what was set-up, fixed, or recommended during the Value Guidance journey interaction with the customer.



what products do you see first use of on the call?

- Teams
- Exchange with domain
- Word/Excel/Powerpoint
- Onedrive
- Microsoft ads
- Bookings
- Other

6. For question 4: **What industry is this business in?** Select one (1) choice from the drop down menu that lists the industry most closely aligned to the customer's business.



What industry is this business in?

What industry is this business in?

- Business or Professional services
- Retail
- Manufacturing/Production
- Other

Recording the Customer Journey

7. For question 5: **What product is this business migrating from?** Select **all** correct choices from what you know from your interaction with the customer.

What product(s) is this business migrating from?

- Google
- Zoom
- Other

8. For question 6: **What is the customer's role in this business?** Select **one** (1) choice from what you know from your interaction with the customer.

What is the customers role in this business ? (select one)

- Business owner
- Business team member/employee
- Other

9. For question 7: **What is the customer's general skill level with Microsoft products?** Select **one** (1) choice from what you know from your interaction with the customer.

Note: this includes how familiar the customer is with Microsoft products and services.

What is the customers general skill level with Microsoft products ? (select one)

- Beginner
- Experienced

10. When you have completed **all** questions, select **Save**. This shares information with Microsoft's product team.