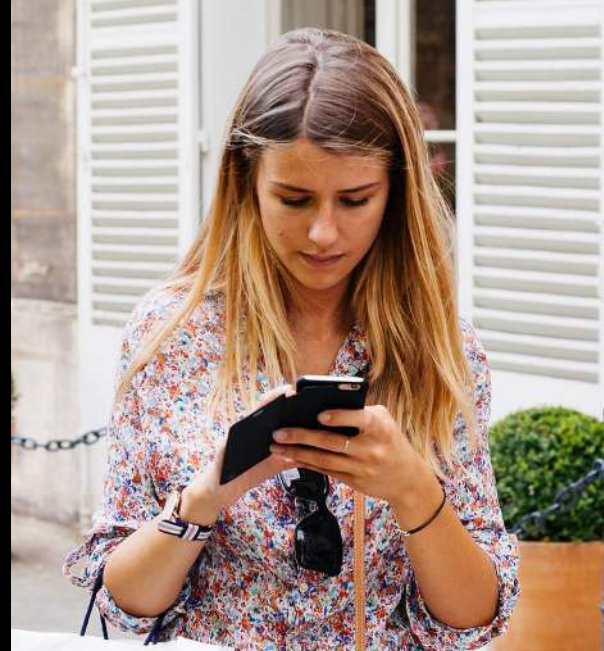




CASE STUDY

Probe CX leverages extensive automation to drive exponential growth



About Probe CX

Probe CX is a leading customer experience organisation, operating across Australia, New Zealand, the Philippines, the United States and India. The company designs and deploys solutions anchored around the delivery of exceptional customer experiences. Powered by over 18,000 employees across 5 countries, Probe CX is a market leader in digital transformation practices specialising in process simplification, user experience design, customer journey mapping, workforce optimisation, data analytics, customer sentiment analysis, digital deployment and automation.

We spoke to Lyle Smith, Manager - IT and Support at Probe CX to understand more about their business, and how IT plays a pivotal role in driving business results.

A scalable IT service desk for a fast-growing company

As a Business Process Outsourcing (BPO) company, Probe CX operates in a very dynamic space, with the need to be extremely proactive, nimble, and agile. With IT being the backbone of the organisation, it was critical to always be ahead of what the business needed. "The IT team is always on the forefront and pushing what we can do internally to deliver the best outcome for our employees. That way, as an organisation, we are able to deliver the best outcome for our clients as well" - says Lyle.

Transformation Highlights:

- Probe CX, in the early days, was using an internal ticketing system that was built out of the same team that was managing the telephony platform
- As the business started to scale, they looked to evolve their IT setup to be able to effectively support the organisation's growth aspirations
- After evaluating a few platforms in the market, Probe CX chose to go with Freshservice to transform their internal ticketing system
- Workflow Automator, Orchestration Center, Self-Service Portal, Alert Management were the four key Freshservice features that have proved extremely pivotal in transforming the employee experience
- Probe continues to build on their transformation by swiftly extending the service management principles to other departments within the organisation.

Catering to IT requests from around 1500 employees, Probe CX, in the early days, was using an internal ticketing system that was built out of the same team that was managing the telephony platform. But as the business started to scale, Lyle and his team realised that they had to evolve their IT setup to be able to effectively support the organisation's growth aspirations. For Lyle, it was imperative that the product met the unique requirements of the BPO business as well as offered the possibility to customise the product to suit their specific use cases.

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When I stepped in, I always wanted to be the innovator. I was constantly pushing the boundaries of what the platform would do to help us stay abreast with what we wanted to do as a business. So when it was time to evaluate and compare IT platforms between one another, I firstly looked at the customizability of the product, and made sure it was fit for the needs that we had, before getting into the other things such as product features.



Lyle Smith

Manager - IT and Support
Probe CX

After evaluating a few platforms in the market, Probe CX chose to go with Freshservice to transform their internal ticketing system. For Lyle, the standout feature while they chose Freshservice was the Workflow Automator, along with the UI which was more intuitive and user friendly than anything else they had seen in the market. Freshservice fit their needs perfectly. While Probe has been acquiring companies to be part of their business, one thing they have retained as a constant is Freshservice, as the IT service management platform. From starting with around 300 employees in their Melbourne office, Probe had rapidly grown to house over 17,500 employees across four countries.

Driving service management excellence

Probe CX's objective was to constantly drive business process simplification and complete automation across the organisation. Having dealt with many systems that were relatively complicated, Lyle was very particular to go for a system with as much back-end work being done by automation. That way, whenever users visited the platform, they would know exactly what was needed and could clearly understand where they needed to get it from, regardless of whether it had to do with raising a ticket, accessing a knowledge article, or requesting something new. With the expectations clear, Probe was able to complete the end-to-end initial roll out in under 12 weeks. Lyle believes "Any implementation where you have stood up, tested, built, and have become functional within 12 weeks, is a win".

Probe's IT team was able to seamlessly migrate data such as the users, ticket information, associated attachments, from the legacy system onto Freshservice in under a week. The IT team was quickly trained and were able to use the tool for their respective use cases. As time progressed, Lyle's team was able to make the most of the Freshworks Academy, and the Community.

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As Freshworks has grown along with Probe, things have become much more simple with the Freshworks Community as well as the actual training that is offered out of the box. In fact the Freshservice Admin Training Guide is a part of the onboarding pack for my IT team. It introduces them to simplistic stuff where they can start to learn the basics and the fundamentals of the effectively administering the platform



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Transforming the experience with granular personalisation capabilities

As an organisation catering to different industries, Probe gets to grapple with a wide range of client requirements. One of the key priorities for Probe is to enable internal employees with exactly what they need to be able to swiftly cater the customer's needs. Role specific customisations were set up to ensure employees have access to knowledge and support articles relevant to what they were expected to do and the industries they catered to.

Limiting the visibility of items based on a department within the internal organisation structure had a very significant impact. The objective was to ensure enablement with just what was required for a specific role, rather than having the user spend a lot of time searching for what they want. "It goes right down to the level where even the optional knowledge articles that are shown on the right-hand side menu, are dedicated based on what one can see at an employee level. Having such a granular personalisation option has served us greatly." says Lyle. He adds, "Many things need to be restricted as there are a lot of similarities within our clients, and being able to split and bucket them into separate, much more palatable spaces has become very integral to transforming the experience". These benefits extend to customer experience too, with users not having to go through hundreds of catalogue items, because all they get to see are the five items that they will need based on their current role. This approach proved pivotal to overcoming a lot of the challenges typical to a BPO business that deals with a variety of customers.

Leveraging the full potential of automation

Probe's vision was to ensure that everything that constitutes a part of a 'business as usual' process was automated. The BAU processes typically are managed by first and second level entry teams, and such interventions are usually time consuming. For instance, with the Microsoft SCCM (System Center Configuration Manager) asset engine tied into Freshservice, whenever an employee was allocated a device while being on boarded, the allocated device already had the requisite policies and software pre-configured based on pre-set rule sets. This made the entire onboarding experience zero-touch.

In case the employees do end up requiring anything more, be it software deployment, which is fully automated, or printer and swipe access, everything is executed through Freshservice as the starting point. This has helped accelerate ticket resolution time for Probe. For instance, with software installations, Probe saves about 5 minutes on average per ticket, per instance, per end user, each year. When that gets extrapolated to hundreds of tickets, it translates into over 50 minutes in savings per user.

Probe is on track to implement complete zero touch on and off boarding through their Human Capital Management (HCM) solution without touching a single ticket all the way down to the new hire, getting an SMS for their first-time password. "It's about making the experience so frictionless that everyone knows it just works. They don't quite know how unless you look under the hood, but from an end user and a business standpoint, things are smooth and seamless. And that's all you need to do for a company our size." says Lyle, while talking about rapidly scaling their workforce, and why speed of execution through automation have made things sustainable in the long run.

Improving visibility and service delivery precision with Freshservice Asset Management

Extending the foundational principles of the transformation, Lyle looked to simplify asset management within the company by providing greater visibility to the IT team, while restraining access to critical systems. Today, every asset in the organisation gets tracked on Freshservice, with asset management built into every service request concerning the entire asset library. So whenever an asset is logged into by a user, it is instantly registered on the system, and then passed straight through Freshservice.

At a given point, the IT team can look up any device in their fleet and see who has logged into the asset. The visibility has enabled a centralised hierarchy system that enables pinpointing the impact of asset failures and in planning impact of change rollouts. With Fresh Discovery agent installed on every device, the IT team gets instantly notified when a device isn't working as expected, or if there is a potential security incident, a ticket would get created automatically and assigned to the concerned team.

Probe also automated the warranty renewal process by integrating the serial numbers of all assets and with workflows configured to instantly create tickets that are then assigned to the procurement team.



Every single asset in our environment is tracked through Freshservice. Be it desktops, laptops, servers, switches, etc. Everything is listed and mapped back to a centralised hierarchy system where we have built networking maps to all our local floors. We can go so far to say, if one of our local switches goes down, we instantly know what desktops will be impacted by that switch failure. So, if the networking team wants to make a change to a server, the Change Manager as well as other departments instantly know what devices would be impacted as a result of that device going down.



Lyle Smith

Manager - IT and Support
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Tapping into key Freshservice features

Lyle points out four key Freshservice features that have proved extremely pivotal in transforming the employee experience

- **Workflow Automator:** Automation is a big focus for Probe, something that Lyle wants to mandate across as many business processes as possible. The Workflow Automator has been extremely helpful in simplifying and eliminating the physical mundaneness of managing tickets for agents. By applying clearly defined tags to track status changes, Probe has also benefited immensely from instant updates to the analytics console, making insights easily accessible.
- **Orchestration Center:** A lot of the workflows that Probe had built over time always seemed limited by the need to build web hooks with the help of developers. But with the Orchestrator Center, Probe is able to circumvent those dependencies by simplifying and automating it through the UI, which no longer depends on developers with advanced coding experience.
- **Self-service portal:** Despite having just twenty FTEs to serve over seven hundred thousand people across stakeholder groups, Probe has pivoted on effectively using self-service to tackle over eight thousand requests that come in every month. With clear knowledge articles hosted both internally and externally, a simplified service catalogue and built-in automation, over 30% of all tickets raised are deflected to self-service without them having to be touched by anyone.

- **Alert Management:** Probe CX also uses Freshservice Alert Management to monitor and handle their critical (P1) incidents. “A service desk team can have full functionality of the alert module without the risk of then making a change in the monitoring tool itself. That’s really the power of Freshservice Alert Management.” says Lyle. “We wanted to simplify things for our service desk and NOC teams. We don’t want them to have 15 systems open just to monitor.”, he adds.

Looking ahead..

Probe’s long term priorities are set on the overarching principles of automation and simplification. While the company looks to drive many big bet projects, the primary focus is to rationalise the experience across the organisation by creating a consistent, seamless and perfect IT experience regardless of whether it is an executive in the office, or a first time agent.



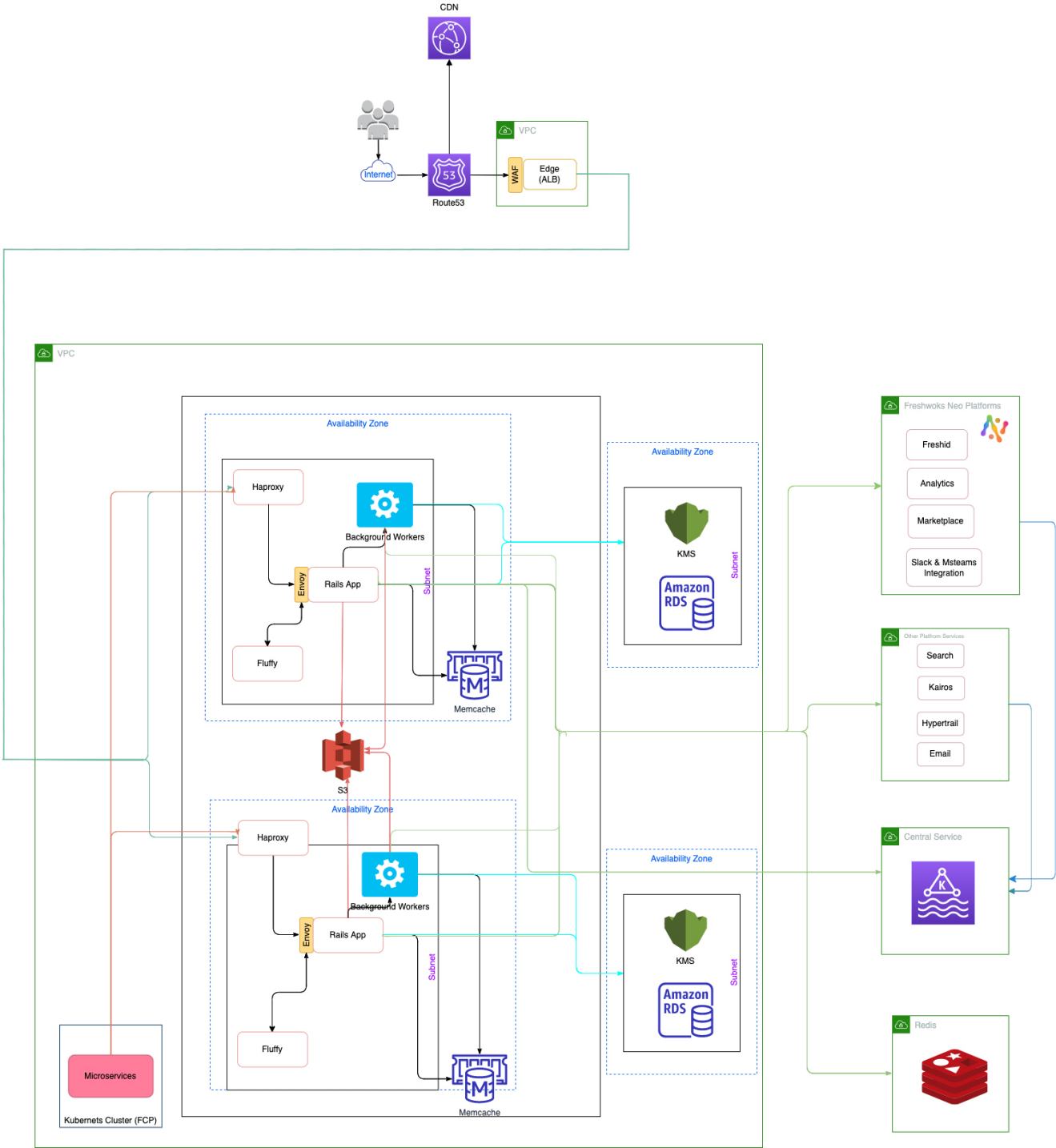
Freshservice continues to play an integral part in Probe’s IT strategy. From day one, we have looked at ensuring that everything IT starts with Freshservice. We continue to build on that, and are slowly extending the service management principles to other departments within the organisation. Being privy to how IT has effectively managed workload with Freshservice, we have had teams such as Facilities and Finance working with us in building support portals to streamline service delivery.



Lyle Smith

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Architecture Diagram



AWS and Freshworks

By hosting its platform on AWS, Freshworks is able to focus its resources on developing easy-to-use and intuitive products while leveraging a proven and reliable cloud infrastructure. With Freshservice on AWS, IT Helpdesk agents and business teams supporting employees can deliver best-in-class employee experience.

AWS Services Used

Amazon EventBridge

Amazon DocumentDB

AWS Lambda

Amazon SageMaker

Amazon Connect

EC2

Lambda

S3

Glacier

RDS

VPC

CloudFront

Route53

Global Accelerator

Cloudwatch

EKS

WAF & Shield

Certificate Manager

SNS

SQS

Secrets Manager



About Freshworks

Freshworks products are designed around the principles of simplicity and functionality. Empower your teams with solutions that are intuitive, and provide the right data to make informed support, sales, and marketing decisions. Our products do away with complex setup and manual tasks, and let you switch your focus back to growing your business the way you want.

Freshworks is an advanced top-tier technology partner of AWS and is a member of the ISV Accelerate/ SaaS Revenue Recognition & AWS Marketplace programs.

[Click here to know more about our products](#)

We're always there to help you with your queries.
If in doubt, feel free to reach out to us at
[**support@freshservice.com**](mailto:support@freshservice.com)

