



PagerDuty

# PagerDuty on PagerDuty: Using our platform to deliver seamless customer experiences

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# Introduction

Delivering a seamless customer experience is essential for the modern enterprise. Yet, customers often find and alert companies to issues before they're noticed internally. As reports come in, organizations' CX and Support teams frequently serve as the first line of response, simultaneously managing customer expectations while escalating tickets to the right responders and staying up-to-date on incident status.

At PagerDuty, we not only help our customers enhance their CX operations, we use our own solutions to deliver flawless digital experiences. By adopting well-defined processes and utilizing our best-in-class platform, we ensure our Support and Engineering teams are tightly integrated, coordinate a consistent customer response, keep internal and external stakeholders up-to-date, and gather learnings that help us prevent issues from impacting customers in the future.

This ebook looks at how PagerDuty uses PagerDuty to enhance our support team's capabilities to meet customer expectations.



# PagerDuty as "Customer Zero"

As a global company with over 20,000 customers, PagerDuty's Support team is always juggling multiple things at once, from staying on top of support queues to meeting internal 2-hour service level agreements (SLAs), managing time-sensitive tickets, and integrating with our Engineering team. We also have teams that provide 24/7 coverage so they can be on-call during incidents and service high-priority customer tickets outside of regular business hours.

While Support promptly engages with customers, resolving issues often entails collaboration with Engineering or escalating to other teams. Managing multiple, simultaneous requests from Premium Support customers can quickly clutter queues and make it challenging to discern the highest priorities. So when we had challenges connecting Support agents to backend Engineering teams, we leveraged PagerDuty to bridge the communications gap.

# The process is the backbone

Establishing a streamlined incident management process ensures that when issues arise, whether it's internally driven or externally driven by customer tickets, the Support team can act swiftly and effectively to pull in the right people at the right time. Our process engages the Support team early on for high-priority incidents and ensures close collaboration with the relevant technical teams.

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## Swift incident identification and resolution

Our primary focus is on swift incident detection achieved through proactive monitoring and recognizing that customers are also a key alerting signal for incident management. This entails continuous surveillance of systems to swiftly pinpoint any potential issues before they have a chance to escalate.

PagerDuty integrates seamlessly with various monitoring and collaboration tools, creating a unified ecosystem. Relevant information is readily available, promoting faster and more informed decision-making. PagerDuty can also automate routine tasks and trigger predefined responses, which accelerates response times, reduces the risk of human error, and allows the team to focus on more complex aspects of incident resolution.

For incidents with customer tickets attached, we're able to manage time-critical escalations more efficiently through our application with Salesforce, which has streamlined our workflow. Application setup is straightforward, involving adjustments within the PagerDuty interface and configuring business rules in Salesforce to trigger events based on our specific criteria. This integration has been instrumental in ensuring we meet our SLA commitments promptly.

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## Escalation paths

Well-defined escalation paths are paramount. Our process helps to ensure that incidents are promptly directed to the right people at the right time according to the severity and nature of the issue. Unnecessary involvement is minimized, ensuring efficient resource allocation.

PagerDuty provides our Support team with real-time visibility into on-call personnel and escalation points, eliminating the manual effort of checking teammate availability, especially during after-hours or remote communication scenarios.

Instead, when a team member needs to escalate or call in backup on an issue, the Support agent can simply click a button, and PagerDuty automatically notifies the on-call team. While PagerDuty notifications may not replicate the immediacy of in-person interactions, this has significantly enhanced accountability and collaboration across our teams.

Our Support managers also serve as escalation points in PagerDuty, ensuring continuous oversight. Team members and stakeholders can easily involve managers for opinions or updates on critical issues, and PagerDuty's analytics tools complement our existing Salesforce analytics, providing valuable insights into customer and team dynamics.

To ensure that we do not miss SLAs, each team member receives PagerDuty notifications tailored to their preferences as a ticket approaches SLA timeout. This proactive approach enables swift action, allowing our team the time to request assistance or escalate to higher tiers of support when necessary before a ticket exceeds SLA. By identifying the tickets at risk of exceeding SLA goals, our Support agents are better able to prioritize the tickets to focus on, which is especially important in a busy queue. This enhanced visibility ensures that resources are allocated efficiently, maximizing customer satisfaction and retention.

### 3

## Assigning a customer liaison

Effective and timely communication is at the center of any incident throughout the whole lifecycle, from identification to resolution to incident review and learnings. As soon as an incident is flagged, we can quickly convene the relevant teams by automatically including our conference bridge details in the incident details, facilitating seamless communication and collaboration during incident resolution.

Upon initiation of a major incident within our internal PagerDuty account, an automated response playbook designates a member of our team as the Customer Liaison. This individual serves as the primary point of contact for all customer-related matters during the incident call, acting as a reference for our Support peers. Their duties extend beyond mere responsiveness; they also play a crucial role in orchestrating the dissemination of information to both internal Support peers and external customers.

Recognized as the authority on all matters about customer engagement during the incident, Customer Liaisons offer guidance and clarification to their peers, helping to streamline communication channels and prevent potential disruptions in the Incident Management (IM) process. By consolidating inquiries and channeling them through a single point of contact, they facilitate efficient coordination among team members, fostering a cohesive approach to addressing customer needs.

Having Support actively involved in the incident call fulfills a crucial role for the troubleshooting teams. Support not only provides insight into the number of customers affected by the issue but also conveys customer sentiment, which guides the response effort.



# 4

## Communicating incident updates

Our communication process encompasses both internal and external stakeholders, leveraging our PagerDuty Status Pages as an important step of our Incident Management protocol. Status Pages are an indispensable tool in our arsenal, facilitating clear and concise communication channels throughout the incident resolution process.

Because Customer Liaisons have a keen understanding of the incident's dynamics and implications, they spearhead status page messaging by collaborating closely with the Incident Commander (IC) and the broader incident team during the call. By actively participating in this process, the Customer Liaison ensures that the status page messaging accurately reflects the evolving nature of the incident, providing customers with timely and transparent updates regarding its resolution progress.



Our internal processes are facilitated by automated templates and tooling, ensuring predictability in communication content. We've established a structured update and follow-up cadence across our entire product portfolio, enhancing stakeholder engagement. This proactive approach includes:

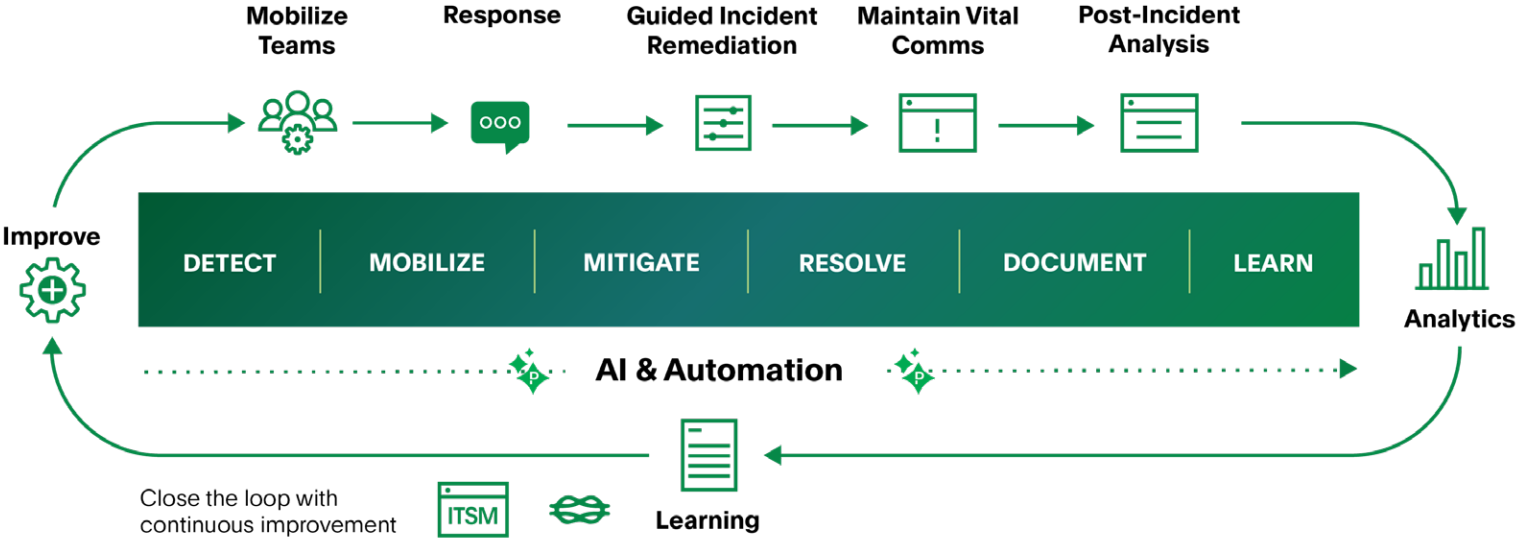
- Immediate assessment of impact within 5 minutes of issue reporting.
- Regular updates every 15 minutes or sooner until resolution.
- Provision of a preliminary incident report within 1 business day.
- Delivery of a comprehensive post-incident report within 5 business days of incident closure.

Harnessing our status update mechanism enables us to provide real-time visibility into the status and progression of resolving all customer-impacting incidents. This transparency not only fosters trust and confidence among our customers but also enhances collaboration and efficiency within our internal teams, enabling swift and effective responses to emerging challenges.

**5**

**Post-incident analysis**

Once an incident is resolved, PagerDuty conducts a thorough post-incident review. This not only helps identify the root cause but also allows for continuous improvement of processes and tools. PagerDuty provides detailed analytics and reporting capabilities so the Support team can assess performance, identify trends, and make data-driven improvements to our processes.





# Conclusion

PagerDuty's journey as Customer Zero exemplifies the importance of combining robust processes with best-of-breed tools to elevate CX operations. The results we've seen have been impressive. Over the past year, our median response times for P1 and P2 tickets have been a fraction of their allowable SLA times, and thanks to customized notification setups, we've implemented target follow-up response time SLAs.

Since using PagerDuty for our Support team, we've managed incidents more effectively and cultivated closer collaboration with our Engineering team, ensuring the voice of our customers is heard during critical situations. PagerDuty's incident management process serves as the cornerstone of this collaboration, providing a unified platform for all stakeholders to document and collaborate in real-time during major incidents. Our Support team actively engages in this process, contributing insights and coordinating efforts to swiftly and effectively address incidents.

Overall, PagerDuty has become an indispensable tool in our Support operations, enhancing efficiency, accountability, and collaboration, thereby ensuring consistent adherence to our SLA commitments.

To see how PagerDuty can help your organization sustain seamless customer experience and bridge the gap between Support and Engineering teams, visit [www.pagerduty.com/solutions/cx-operations](https://www.pagerduty.com/solutions/cx-operations).

## About PagerDuty

**PagerDuty, Inc.** (NYSE:PD) is a global leader in digital operations management, enabling customers to achieve operational efficiency at scale with the PagerDuty Operations Cloud. The PagerDuty Operations Cloud combines AIOps, Automation, Customer Service Operations, Incident Management into a flexible, resilient and scalable platform to increase innovation velocity, grow revenue, reduce cost, and mitigate the risk of operational failure. More than half of the Fortune 500 and nearly 70% of the Fortune 100 rely on PagerDuty as essential infrastructure for the modern enterprise. To learn more and try PagerDuty for free, visit [www.pagerduty.com](https://www.pagerduty.com).

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