

*The Power of Remote Support in Battling
Today's Top Customer Support Issues*

June 1, 2010

*A Joint White Paper from
TSIA and Citrix Online*

Table of Contents

Executive Summary	3
What's Keeping Support Executives Awake at Night?	3
What Are the Support Impacts of Growing Technical Complexity to Margins and Customer Satisfaction?	4
<i>Figure 1: Complexity of Products Supported by TSIA Members</i>	4
<i>Role of Remote Support in Battling Increased Complexity</i>	5
Are We Running Out of Margin Improvement Opportunities?	6
<i>Figure 2: How Customers Evaluate Support</i>	7
<i>Role of Remote Support in Identifying Margin Improvements</i>	7
<i>Figure 3: Most Useful Tools for Issue Resolution</i>	8
How Do We Defend Against Maintenance Contract Price Pressure to Drive New Service Revenue Opportunities?	8
<i>Figure 4: Customer Motivation for Renegotiating Maintenance</i>	9
<i>Role of Remote Support in Driving New Service Revenue Opportunities</i>	10
How to Translate Good Service into Market Share Advantage	11
<i>Figure 5: Fee Defenders Make Understanding Customers a Priority</i>	11
<i>Role of Remote Support in Creating Market Share Advantage</i>	12
<i>Figure 6: Moving Customers from Satisfied to Loyal</i>	12
What Is the Future as We Move from Fixing Problems to Driving Product Value?	13
<i>Figure 7: Maintenance and Support Value Framework</i>	14
<i>Role of Remote Support in Driving Product Value</i>	15
What Are the Challenges with Offshoring Support and How Do We Address Them?	16
<i>Role of Remote Support in Overcoming Challenges to Successful Outsourcing</i>	17
THE TSIA RECOMMENDS	18
A Look at GoToAssist	19
How GoToAssist Works	20
ENDNOTES	21

Contact Information

Citrix Online
6500 Hollister Avenue
Goleta, CA 93117
Tel.: 805-690-6400
Fax: 805-690-6471
info@citrixonline.com
www.citrixonline.com

Technology Services
Industry Association
17065 Camino San Bernardo
Suite 200
San Diego, CA 92127
Tel.: 858-674-5491
Fax: 858-674-6794
info@tsia.com
www.tsia.com

EXECUTIVE SUMMARY

Through ongoing member interviews, surveys, conferences, and summits, TSIA has identified the six toughest business issues impacting service and support organizations today. These strategic issues represent the major obstacles to success for today's technical support teams. For companies who want to differentiate competitively based on quality of service, responding appropriately to these issues is critical. Innovation in process and technology is required in order to meet these challenges head-on and lay the foundation for success in the years to come.

With customer expectations on the rise, and pressure to increase agent productivity a constant reality, remote support technology is an area in which companies wanting to proactively resolve customer problems and increase both customer satisfaction and agent productivity should invest. This paper will discuss the role of remote support technology, including remote control and diagnostics and Web collaboration, in addressing the key strategic issues.

WHAT'S KEEPING SUPPORT EXECUTIVES AWAKE AT NIGHT?

By working closely with customer service and support executives across high-tech hardware and software, broadband, consumer electronics, retail, telecommunications, and other technology-related industries, the Technology Services Industry Association (TSIA) has identified six key business issues facing service and support managers today. These issues are:

1. What are the support impacts of growing technical complexity to margins and customer satisfaction?
2. Are we running out of margin improvement opportunities?
3. How do we defend against maintenance contract price pressure to drive new service revenue opportunities?
4. How do we make good service translate into market share advantage?
5. What is the future as we move from fixing problems to driving product value?
6. What are the challenges with offshoring support, and how do we address them?

This paper will explore these issues and offer guidance to help companies successfully face these challenges to improve service levels and differentiate competitively based on quality of service. For each issue, the role remote support can play in addressing the issue will be examined.

What Are the Support Impacts of Growing Technical Complexity to Margins and Customer Satisfaction?

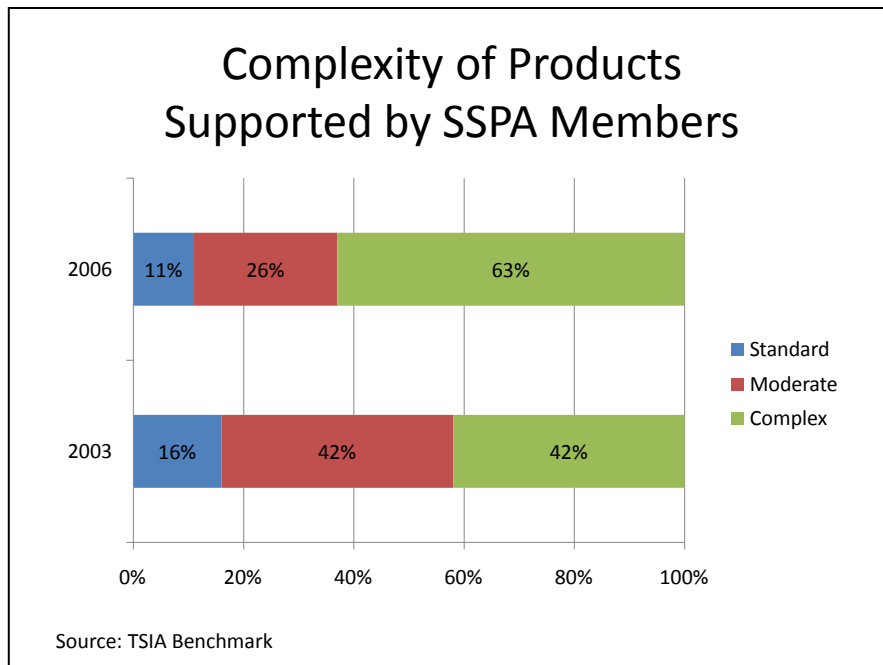
The increased complexity of technology has created huge volumes of service interactions—with customers whose patience is low and frustration is high. Companies are continually investing in technology to streamline problem diagnosis and resolution to help address this tsunami of phone calls, emails, and Web chats. Unfortunately, TSIA Benchmark data shows that service levels for both phone and electronic channels have declined in the last few years, meaning current processes and systems are not keeping up with the dramatic volume increases.

An excellent illustration of how complexity is impacting the technology industry is the way members classify the products they support. One question on the TSIA Benchmark survey asks: How would you describe the complexity of the products that you support?

- **Standard.** General business products or applications; requires product proficiency to effectively support.
- **Moderate.** Increasingly complex products running in a variety of environments; requires advanced technical and/or business skills to provide effective support.
- **High.** Complex application and/or operating environment; requires high degree of technical and/or business expertise.

The percentage of clients who identify their products as highly complex has grown from 42% in 2003 to 60% today. As seen in *Figure 1*, only 10% of members now identify as “Standard.”

Figure 1: Complexity of Products Supported by TSIA Members



Customer interaction volumes have exploded over the last decade, with the average monthly interaction volume increasing well over 100% from 2003 to 2010. When this explosive volume meets the tsunami of complexity, technology support organizations find themselves in a “perfect storm” in which:

- **Each interaction is harder to resolve.** With the increased adoption of Web self-service, customers are able to easily solve simple questions on their own, and many chief service executives have commented to TSIA that the easy, “one and done” questions are declining via the phone channel. If Web self-service weeds out many of the frequently asked questions, it means the calls to the support center are, on average, more difficult than in the past.
- **Existing problem resolution technologies are inadequate.** Companies that have made due for a decade with basic knowledgebase and search products are finding that more robust problem diagnostics are needed to resolve a higher percentage of issues, better searching tools are necessary for agents and customers to find desired content, and stronger tools for creating and maintaining content are required to meet the needs of knowledge engineers. Without investing in newer e-service capabilities, more issues are escalated to Level 2 and 3.
- **Service levels decline over time.** With the average complexity of each call increasing, problems take longer to solve. Without additional investments in training, staff, and/or technology, first-contact closure rates decline and case-resolution time increases.

To illustrate the impacts of this perfect storm, TSIA Benchmark data shows that since 2003 there has been a decline in first-contact closure rates and percentage of issues resolved in 24 hours for both phone and electronic channels (e-channels). First-contact closure for phone calls dropped 9% from 2003 to 2010. The increased volume of e-channels is a likely co-conspirator in the 17% drop of first-contact closure for e-channels, from 52% to 35%, during the same period. As problems become harder to solve, self-service success rates suffer as well, and the benchmark data also shows that successful visits to self-service are also declining, down from 48% to 40%.¹

Role of Remote Support in Battling Increased Complexity

Remote support technology can have significant impacts on the fallouts of increased complexity, including:

- **Reducing call handling time.** Case studies from successful remote support implementations show that with agents in the driver’s seat, incident handling time can be lowered by as much as 50% for certain incidents. As technology becomes more complex, walking novice customers through recovery procedures or checking detailed settings can take time and increase customer frustration. With the agent free to take control of the

machine, perform needed procedures, and check settings, much less time is spent resolving the issue.

- **Increasing first-interaction closure rates.** When agents are able to instantly “see” error situations firsthand and check the system environment remotely, problems can be identified and resolved immediately, avoiding multiple calls or emails to gather additional information.
- **Deflecting phone interactions.** Allowing customers to communicate effectively in their channel of choice is a key to building satisfaction. As Generation X and Y age into the target demographic of more industries, honoring their channel preferences means offering more capabilities online. Remote support offers the same capabilities via a Web chat/collaboration session as a phone call, allowing customers to remain in their channel of choice for the entire problem resolution session.

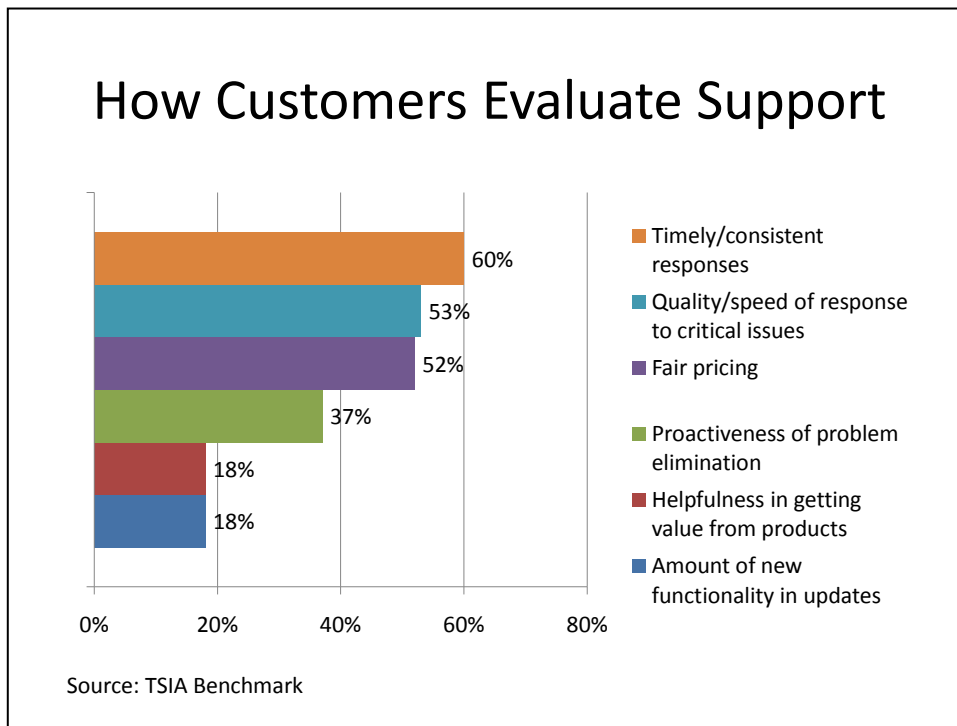
Are We Running Out of Margin Improvement Opportunities?

Over the last six years there has been significant top-down pressure on service and support organizations to develop and execute successful strategies for improving margins. Services management has responded by reducing call center staff, outsourcing, offshoring, moving toward Web-based support, and remote service delivery. Still, CFOs continue to make demands to streamline processes, improve productivity, and control costs, while at the same time demand superior customer service and support. Three facts help illustrate why this issue is front and center:

- **Service margins are increasingly visible.** As services represent a larger percentage of corporate revenue, their relatively low margins are more visible. Using the software industry as an example, in 1999 product revenues, with a 94% margin, represented 65% of total revenues; service and support contributed 25% of total revenues with a margin of 53%. Over the last decade, service revenues within software companies have risen, now representing 60% or more of total company revenue, but margins have only improved slightly, currently at 55%. Though some progress has been made in improving service margins, their impact on the bottom line puts additional pressure on support executives.²
- **Support costs are largely fixed.** According to TSIA Benchmark data, a breakdown of total cost of support and maintenance (TCSM) shows that the largest percentage, 73%, is staff costs. In mature support organizations, making significant changes to staff costs will require complete organizational and process changes, additional adoption of technology to streamline processes, and perhaps use of offshore personnel—none of which guarantee major reductions in personnel costs without impacting effectiveness.
- **Customers are noticeably impacted by changes.** While making changes to internal procedures or back-office processes may impact customers indirectly over time, making changes to customer service personnel and processes is immediately impactful to customers in very visible ways. In fact, according to TSIA Benchmark data, the single

most important element of support to customers is receiving a timely and consistent response (see *Figure 2*), and this is one metric greatly impacted by cutting personnel or hiring lower-cost technical support or customer service agents.

Figure 2: How Customers Evaluate Support



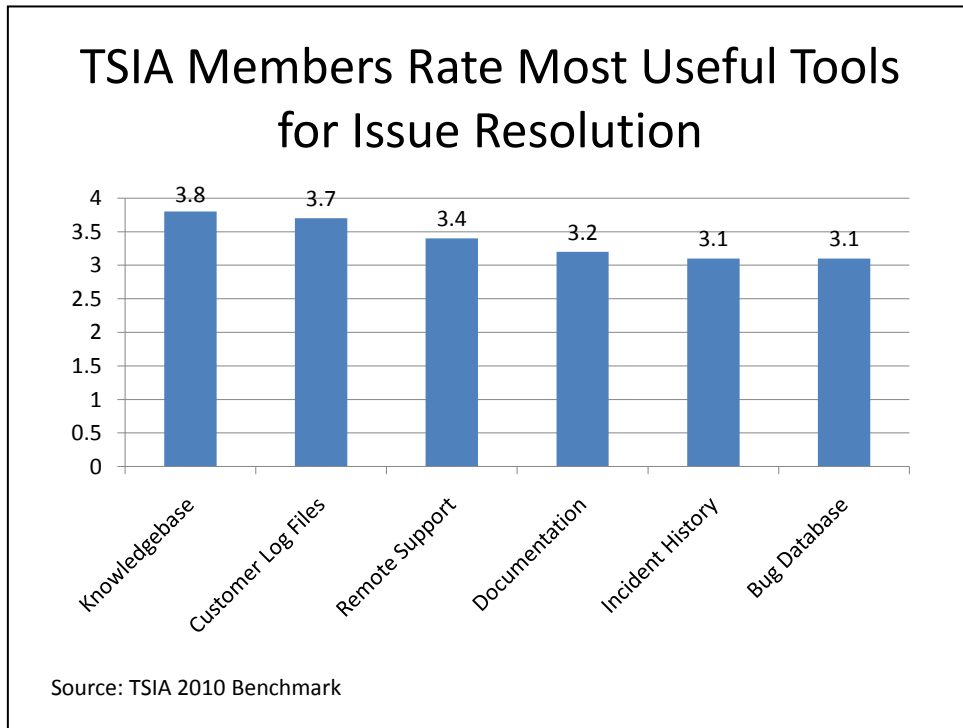
The wide adoption of outsourcing, key technology elements such as knowledgebases, diagnostic tools, and Web self-service, and higher volume interaction channels such as email and Web chat have all had major impacts on lowering operating costs and increasing agent productivity, and it could be argued that the “low-hanging fruit” of margin improvement has been picked. However, innovation within the industry will offer new options for significant margin impacts, with Web 2.0 as an example with its ever-connected nature allowing more proactive capabilities, as well as online communities of customers solving each other’s problems without live agent assistance.

Role of Remote Support in Identifying Margin Improvements

Remote support technology is a proven way to increase agent productivity, and even companies with successful knowledgebase implementations and highly-trained agents can still find a significant return on investment for a remote support project.

According to the TSIA Benchmark database, as seen in *Figure 3*, viewing customer log files—a process often enabled by remote support platforms—was rated by members as the second most useful tool for technical support issue resolution, just behind knowledgebases. The ability to take remote control of a customer’s computer placed third.

Figure 3: Most Useful Tools for Issue Resolution



Remote support tools allow both viewing of customer log files and remote control of customer computers, and therefore can have a significant impact on margin improvements. Ideally, remote support capabilities are integrated with the agent knowledge, allowing technicians to automatically initiate a remote connection when recommended by a knowledge article. For Web self-service requests, log files can be captured using remote support and attached to an incident record for research by a technician at a later time.

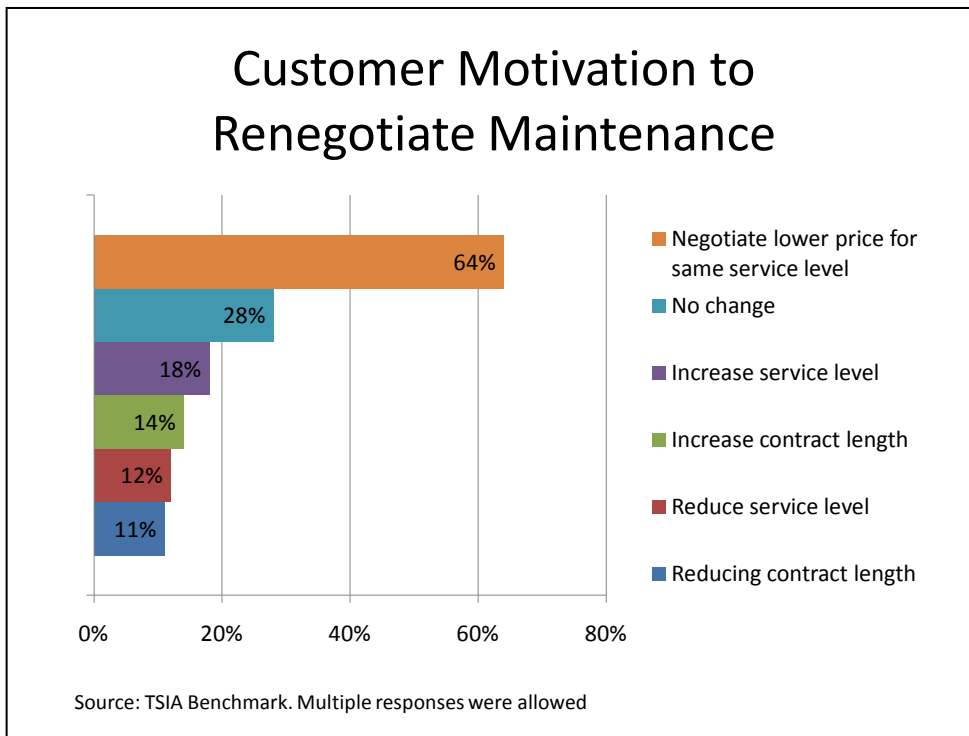
How Do We Defend Against Maintenance Contract Price Pressure to Drive New Service Revenue Opportunities?

One of the most significant and frequently overlooked trends of the last five years for technology companies has been the emergence of services, support, and maintenance as the primary economic driver of corporate revenue growth and profits. Services and support professionals need to be aware

of emerging trends that threaten to reduce services growth and margins, and be responsive to effective strategies for defending prices for maintenance, service, and support contracts.

The research results are clear: while the remarkable financial success of services, support, and maintenance organizations now represent important factors in total company financial performance, enterprise customers have turned to renegotiating maintenance and support contracts and prices as a primary lever to reduce internal IT operating expenditures. According to TSIA members, 64% of customers requesting to renegotiate service contracts are hoping to renew with the same level of service at a lower price (see *Figure 4*).

Figure 4: Customer Motivation for Renegotiating Maintenance



Through member interviews, TSIA has identified three primary pressure tactics used by customers to exert price pressure on maintenance renewals, further eroding margins:

- **Tracking metrics and scrutinizing value.** Customers are becoming much more involved in the wording of contracts, which metrics are used, how metrics are tracked, and devoting personnel to independently monitor metrics and adherence to service levels. If a direct

correlation cannot be found between a metric and the service experience, customers may push to redefine or use alternate metrics, and companies end up in contentious meetings with customers each quarter defending service delivery metrics.

- **Reducing service levels and buying a la carte.** If customers cannot easily identify value from service options they tend to drop premium service agreements and push for a “menu” approach, buying service options a la carte. This minimal approach to service may not offer adequate protection for the customer should an emergency arise, leading to further discontent down the road.
- **Partner with consultants and analysts.** With the cost of delivering high-quality service rising, companies are struggling to raise or even maintain price levels, particularly when influential industry consultants and analysts use their Bully Pulpit to call for lower maintenance pricing. Customers are turning to these third parties to gain inside scoops on maintenance contract options and pricing from other customers and use them as ammunition in renegotiations.

Role of Remote Support in Driving New Service Revenue Opportunities

Remote support software can play a role in an overall approach to defending maintenance pricing as well as creating new service revenues, particularly through:

- **Adhering to SLAs.** As documented previously, remote support plays a key role in improving agent response time and productivity. In environments in which penalties are paid for missing service level agreement (SLA) commitments, looking to technology to give technicians an edge in meeting and exceeding SLAs helps meet customer expectations and avoid costly penalties.
- **Offering premiere support options.** With more attention to proactive support, premiere support offerings often include some proactive aspect, such as the ability to pull error logs and initiate resolution before the customer is impacted. By leveraging remote control software when an error is detected by proactive monitoring, issues can be identified and resolved with little or no impact to the customer.
- **Requiring remote access for basic support.** Keeping down the cost of delivering support is important, particularly for the lower service levels. Requiring customers at basic levels of service to allow remote control and remote diagnostics helps deliver support to these customers as inexpensively as possible. Also, requiring online only interactions, available with Web collaboration, can further cut support costs.

How to Translate Good Service into Market Share Advantage

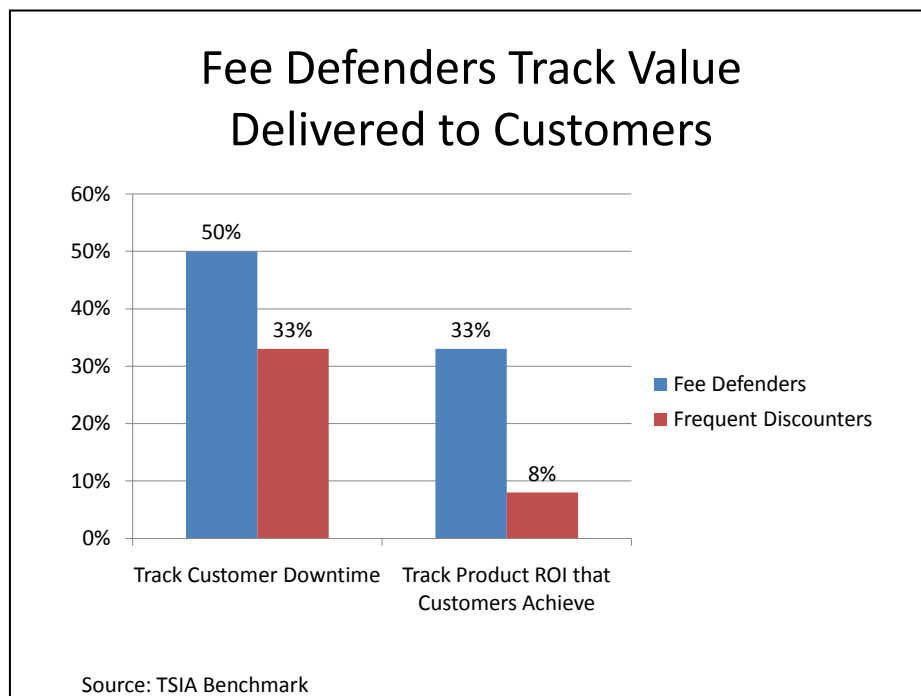
In today's fiercely competitive environment, companies in multiple industries, both B2B and B2C, are looking for ways to differentiate themselves in the marketplace. More and more dollars are spent on delivering better service and collecting more relevant metrics with the expectation of more loyal customers and improved financial performance. The goal is clear: achieve market share advantage by delivering better support.

Companies are building out their support capabilities by progressively earmarking more resources and budget line items for service delivery (currently over 73% of global service and support budgets), and it is vital that potential consumers and enterprise customers gain confidence in your service and support practices before they make purchasing decisions.

If you build it, they won't necessarily come—at least not without some effort on your part—and TSIA has identified three ways to make better service translate into market share advantage:

- **Understand your customers.** It is essential to keep current with the business environments of your customers, as it directly affects your bottom line. As seen in *Figure 3*, companies that are successful at defending their support contract prices (known as "fee defenders") track the value they deliver to customers. Fifty percent of fee defenders track customers' downtime (versus 33% of frequent discounters), and 33% of fee defenders track product ROI that customers achieve (versus only 8% of frequent discounters).

Figure 5: Fee Defenders Make Understanding Customers a Priority



- **Visibility of great service.** Increase your ROI (return on investment) for service and support not only by delivering great service and winning customer satisfaction, but by making better service more visible through media relations: press releases, articles, customer success stories, case studies, and other external communications.
- **Get certified.** Prove to your customers that you provide outstanding service by including customer satisfaction certifications in publicity. As an example, with the J.D. Power and Associates Certified Technology Service & Support Program, companies gain competitive advantage and defend against price discounts by certifying that they meet the new standard of excellence in the industry. Tap into the demand for vendors with world-class service and support:
 - Eighty-four percent of recently surveyed enterprise IT buyers consider the satisfaction of a vendor's current customers during the evaluation process.
 - Eighty-seven percent of recently surveyed enterprise IT buyers indicate vendors with proven high customer satisfaction would have an advantage over competitors who could not prove it.
 - Over 80% of recent survey respondents indicate that if a vendor is J.D. Power and Associates-certified they would feel more confident about working with that vendor.

Role of Remote Support in Creating Market Share Advantage

Creating satisfied customers begins when the customer first shops for a product. The buying cycle, purchase experience, and delivery and setup of the product all drive customer satisfaction before the first support call is ever received. But support plays a key role in moving customers from satisfied to loyal, and increasing customer loyalty is a primary goal for companies wishing to create market share advantage with service.

Figure 6: Moving Customers from Satisfied to Loyal



As illustrated in *Figure 6*, TSIA has identified three critical components to moving customers from satisfaction to loyalty, and remote support plays a key role in each:

- **Bonding.** The quickest way to bond with a customer is to offer the right answer and a positive service experience, every time. By leveraging remote support to quickly diagnose and resolve customer issues, customers know they can rely on you for fast, efficient service.
- **Personalization.** With operating systems and applications providing an ever-increasing myriad of options for personalizing user interfaces and functionality, effective troubleshooting means having an in-depth understanding of each customer's environment and system configuration. Using remote support, technicians immediately can see which configuration options are being used and understand how this contributes to or impacts the support issue, without having to walk the customer through endless scripts to identify specifics of the environment.
- **Empowerment.** Empowering customers means changing the way they receive support and freeing them from the burden of long, complex diagnostics. When surveying customers on what they like best about remote support, a frequent response is that while the remote technician is resolving the issue, the customer continues on with their work. If the technician has a question, they can pop a chat box to the customer with minimal interruption to a phone call or other task.

What Is the Future as We Move from Fixing Problems to Driving Product Value?

By moving away from the current break/fix technical support model by providing a value-added customer experience, organizations can gain a significant business advantage. Positive customer support experiences have a measurable impact on customer loyalty, brand perceptions, purchasing behavior, and most importantly, a customer's willingness to make recommendations about a company and its products or services to other interested buyers.

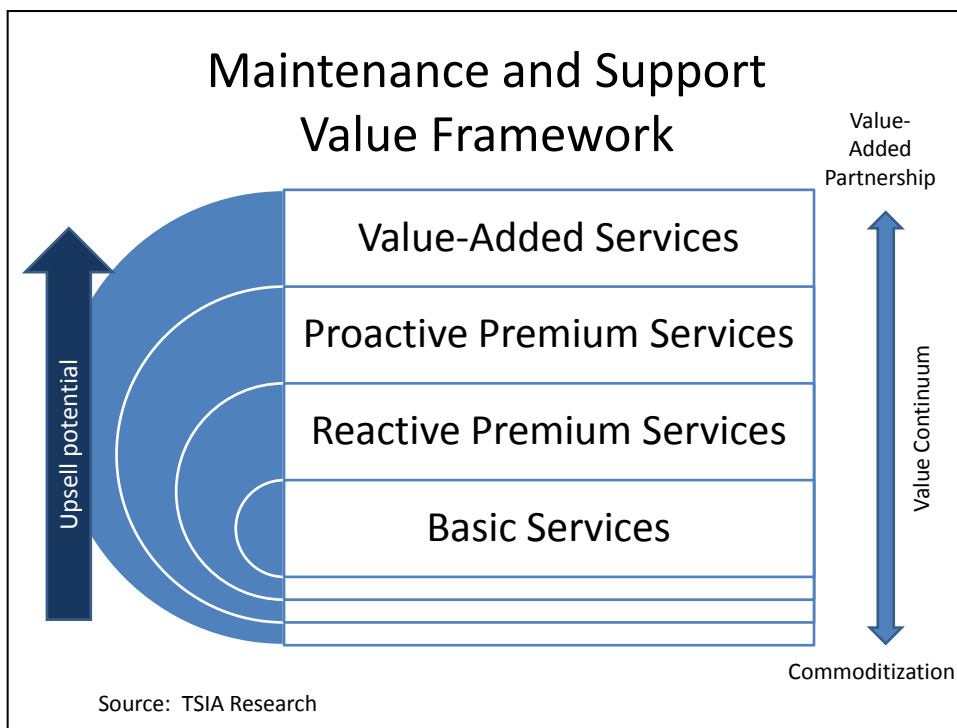
Positioning maintenance and support as a true value-add rather than an insurance policy that provides protection in the event of a problem is not yet a mainstream approach. Yet there are clear signs that the traditional reactive support offering is no longer meeting the needs and expectations of customers. One need only look at the increased trend around discounting on maintenance and support that is being driven by customers. While partly financially motivated, it is also being driven by a higher degree of scrutiny being placed on the value of the maintenance contract. Customers want to know why they're paying for it and what business benefit it is providing.

Some technology vendors are responding by increasing their sophistication in using ROI-based sales and marketing techniques to defend support pricing. This is a great defensive move. However, TSIA

believes it is not enough and that more radical change is required to sustain the business over the long-term.

TSIA has identified four levels of services that should comprise a technology service vendor's support portfolio. The four levels extend from basic services such as troubleshooting, to value-added services such as best-practices consulting. A key consideration is that as service organizations climb up through these levels, the nature of the customer relationship is altered—from transactional relationships involving commoditized services, to partnerships that create real value.

Figure 7: Maintenance and Support Value Framework



- **Basic Services.** Represents service features that are typically provided by vendors as part of basic support offerings—no premium pricing, but delivery is key for defending base prices.
- **Reactive Services.** Relates to the “who, how, when, and where” of service requests. The value to the customer is basically “getting my problem solved faster.”
- **Proactive Services.** Reduces the number and severity of problems. The value to the customer is basically “helping me avoid problems in the first place.”

- **Value-Added Services.** Helps businesses get more value out of an application by increasing user adoption and helping users find and use appropriate features.

Today the support industry is in the midst of basic, reactive, and preventive services which represent the core of most vendors' maintenance and support offerings. Value-added services are where the industry is headed, but there needs to be more focus on the part of vendors to understand customer requirements and develop offerings that are focused on helping customers unlock the full potential of their product investments and accelerate the customers' time to ROI and business impact and ideally a new state of IT-driven competitive advantage.

Role of Remote Support in Driving Product Value

Moving from a reactive to a proactive environment means changing the basic DNA of most support organizations. One way that remote support helps with this evolution is by rule-based proactive chat, inviting customers to a Web collaboration and remote support session with a technician. Using rule definitions, customers can be prompted with an offer of assistance when they:

- **Are struggling to find an answer online.** Customers who perform multiple searches of a knowledgebase or view multiple knowledgebase articles are likely struggling to find the right answer. With surveys showing customers will rephrase questions up to five times and then abandon the site in frustration, proactively prompting customers who are having difficulty finding the right answer not only solves their problem faster, but encourages them to try self-service again in the future.
- **Are a priority customer.** While it certainly is not cost-effective to prompt every customer performing self-service if they would like assistance, for premiere or high-value customers it is not a bad idea. Using rules, priority customers can be proactively prompted only during lulls in inbound call activity to help maximize agent productivity and service levels.
- **Have remained on a location for an extended time.** Borrowing a page from e-commerce companies, who may prompt customers who have items in their shopping cart if they have questions, if a customer has remained on a knowledgebase article for an extended period of time, they may be having problems following the procedure. Identifying the more complex self-service articles and checking in with customers who may have run into trouble is a great way to assist the customer, while allowing them to remain in their channel of preference—the Web.

What Are the Challenges with Offshoring Support and How Do We Address Them?

Outsourcing is a well-established support industry institution that has not yet achieved its full potential. Outsourcing has evolved as a cost-effective alternative for meeting service demand, but is not universally recognized as a strategic imperative for achieving service excellence. A TSIA study on the general perceptions about outsourcing confirmed that the primary motivation for using an outsource partner was cost. This study also indicated that perceptions about quality and technical capabilities were inhibitors to more widespread use of outsourcing.

The single largest outsourced function today is front-line calls (42%) followed by outsourcing support for mature products (35%). Relying on outsourcers to provide services for these customers is relatively low-tech and low risk. Front-line calls require sufficient skills to classify, document, and redirect to, or dispatch appropriate assistance. Mature products require appropriate technical skills but generally have a large amount of accrued knowledge about problems, solutions, and workarounds, with limited recourse for escalation.

Quality of service and customer satisfaction are always top priorities, and are probably the area with the biggest concern with outsourced support. With the proliferation of outsourced contact centers and tech support operations in India, Indonesia, the Philippines, and other locales, agent quality is declining and turnover is on the rise. With outsourcing firms seeking large numbers of agents to fill contract obligations, customer service skills training and accent neutralization workshops should not be assumed.

Outsourcing has traditionally been available as a means to extend service capacity. Approximately a quarter (23%) of service organizations that outsource look to outsourcers to provide temporary capacity to support new product launches; 15% use outsourcing for overflow support; and 4% rely on outsourcing for seasonal support. The costs and logistics associated with using outsourcing to extended capacity are generally more cost-effective than hiring and training full-time staff to meet this temporary demand.

Perhaps the most strategic application of outsourcing is when it is used to extend service capabilities. Extending capabilities includes reaching new markets with access to global infrastructure and language skills (23%) and providing off-hours support (23%). Leveraging the established infrastructure of outsourcers for both off-hours support and global reach provides an effective alternative to building the capability in-house while volumes are low and demand uncertain.

The basis of the outsourcing relationship is most often measured in terms of cost per call, profit margins, and customer satisfaction. As long as all parties can agree on acceptable financial terms while meeting reasonable service levels, the relationship makes business sense.

Outsourcers range in size and capabilities. Depending upon your business needs, a strategic partner may be waiting to help solve your problem. To ensure a successful relationship with an outsource partner:

- **Make an honest assessment of the right fit.** Don't proceed with the relationship unless you are sure you can make it work. And that includes checking references for other companies within your industry using the outsourcer.
- **Establish service level agreements.** Establish contractual obligations for achieving specified targets for key performance metrics and penalties for missing SLAs.
- **Consider a shared-risk/shared-reward proposition.** Providing incentives to the outsourcer to perform at or above established service levels creates a true partnership instead of just an outsourcer relationship.
- **Define performance metrics and evaluation process.** Establish metrics, evaluation processes, and frequency for monitoring service level performance. Spend time in the definition of each metric, as outsourcers may define key metrics differently than you do. Consider having your internal quality monitoring team do spot checks of outsourcers calls, even if the outsourcer provides QM, to be certain they measure up to your internal standards.
- **Take the time to integrate technology and processes.** Integrate technology and processes to provide a seamless customer experience with an audit trail, and to make certain that all customer interaction data is ultimately captured in your own CRM system.

Role of Remote Support in Overcoming Challenges to Successful Outsourcing

Remote support and collaboration software have definitely enabled many aspects of outsourcing to succeed, including:

- **Location no longer matters.** Offshore agents in Europe or Asia/Pacific can access a customer's computer in North America using remote control, eliminating the miles with an Internet connection.
- **Deflect phone interactions.** Leveraging Web chat as a support channel enables offshore agents to successfully support customers with no issues regarding accent neutralization.
- **Collaborate with experts.** Offshore agents can quickly pull onshore experts into a Web collaboration session for complex customer issues.

Remote support also helps with quality concerns, as the entire remote session can be captured and logged in the case-tracking or CRM system for quality monitoring as well as bulletproof accountability.

TSIA RECOMMENDS

There is no simple solution to these issues, and in fact, the issues themselves continually evolve, requiring support organizations to be nimble, flexible, and open to change. Innovation is the best approach to meeting these challenges long term, and TSIA recommends that companies focus on innovation in:

- **People.** What is the skill set required for successful agents today, and where are these agents located? Are more employees working part-time from home, or are outsourced and/or offshore agents the answer? Do today's applicant-screening interviews and skills assessments make sense in a multi-channel world with email and chat bypassing phone volumes? Leveraging the power of communities to change support processes is another key innovation: perhaps the best qualified agent to help a customer is another customer, with the two interacting in forums in your virtual online community.
- **Process.** The greatest emphasis on process change may be the shift from reactive to proactive problem resolution. Many of today's support processes begin with a single assumption: the customer calls with a problem. With Web 2.0 enabling more proactive monitoring and alerting, and expanding the reach of automated monitoring and problem diagnostics into the home to more electronic devices, process definitions must be overhauled with a focus on solving more problems with zero customer involvement.
- **Technology.** Likely the area offering the most hope, companies must continually refine technology platforms to not only make their own products easier to support, but also to leverage technology from TSIA partners to remotely solve issues effectively, provide excellent self-service, and further streamline assisted channels.

A LOOK AT GOTOASSIST

Citrix® GoToAssist® is a Web-based remote-support solution that enables support agents to chat with end users and remotely view and control their computers. It is a hosted solution that can be easily integrated into existing support infrastructure. GoToAssist's incident-resolution tools, reporting functionality, integration services, and technology are based on support best practices, directly contributing to lower support costs, improved end-user productivity, and increased customer loyalty. GoToAssist is consistently chosen by support organizations over other solutions due to better security and faster incident-resolution times. GoToAssist offers the following features and functionality:

- **Multiple Connection Methods.** Web Mode enables end users to quickly and easily request support from the Web or an organization's product interface to facilitate a fast, easy transition from self-service to assisted service. Phone Mode allows a support agent to invite an end user already on the phone to a remote-support session. Phone Mode provides the option for multiple simultaneous remote-support sessions.
- **Intelligent Incident Routing.** Rapidly route end-user inquiries to the appropriate support department or agent and easily determine which level of support to deliver.
- **Live Chat.** A tabbed agent interface makes it easy to locate and toggle between up to eight simultaneous chat sessions. Add pre-scripted messages or URLs to reduce response time for commonly used phrases or frequently asked questions.
- **Two-Way Desktop View or Control.** The agent can view or share control of the end user's desktop—or vice versa—even in multi-monitor desktop environments.
- **Remote Diagnostics.** Collect system information, including operating system details, total and available memory, applications and services currently running, and more—with just one click. Customize to include version details for specific applications, key information from the registry, and the contents of specific text files.
- **File Transfer.** Instantly exchange files, folders, or a combination of files and folders to apply patches or send URLs and updates to the end user or receive log files from the end user.
- **Reboot/Reconnect.** Restart the end user's system and automatically reconnect to the support session in progress.
- **Annotation Tools.** The agent and end user can draw, highlight, or type on each other's screens to show exactly where the problem is or explain how to resolve the issue.
- **Session Transfer.** An agent can seamlessly transfer a session directly to another agent or to an entire support team for faster resolution and to reduce the need to schedule callbacks.
- **Team Collaboration.** This one-to-many approach enables an agent to invite additional experts to collaborate in a single GoToAssist session. Invited agents can be visible or invisible to the end user.

- **Session Recording.** Session recordings can be used for evaluation, training, and archival purposes, enabling compliance with governmental and industry regulations such as the Gramm-Leach-Bliley (GLB) Act, the Health Insurance Portability and Accountability Act (HIPAA), and Sarbanes-Oxley.
- **True 24-Bit Color.** A true-to-life, full-color view of the end user's desktop is perfect for supporting high-graphic software or design applications.
- **Management Center.** Monitor, measure, and evaluate team, sub-team, and individual agent metrics, chat session logs, and real-time reports.
- **Manager's Dashboard.** Monitor incoming queries and teams, sub-teams, or agents at a glance in real time through a personalized dashboard to ensure team performance goals are being met.
- **System Administrator Access.** IT help desk agents with administrative privileges can remotely log in to an end user's computer to perform system administrative tasks without interrupting the session in progress.
- **Manager Silent Monitoring.** Managers have the option to silently observe a live remote session in progress, ensuring that agents are properly following prescribed support procedures at all times.
- **Surveys and Reporting.** Help desks and contact centers are often tasked with achieving higher customer-satisfaction targets related to higher revenue and lower costs to business-line managers. GoToAssist addresses this need for reliable customer-satisfaction statistics by instantly capturing end-user feedback through post-session surveys and incorporating business-driven reporting.
- **Integration Options.** GoToAssist enables easy integration with an organization's support Web site, as well as leading service-desk applications, such as CRM, knowledgebase, ACD, or other applications.

How GoToAssist Works

GoToAssist's architecture is designed for maximum reliability, scalability, and security. Integration is seamless: Organizations don't have to install software on end-user machines or deploy any additional infrastructure or IT resources. GoToAssist's small, on-demand download runs as a temporary executable; nothing is permanently installed on the client computer. Plus, GoToAssist's Web-based, screen-sharing technology is browser-independent and works with existing firewalls, enabling efficient on-the-fly support even over dial-up connections. GoToAssist enables multi-level security and control, as well as always-available, reliable service by providing:

- **Complete Data Privacy.** State-of-the-art security features including 128-bit end-to-end Advanced Encryption Standard (AES) and Secure Sockets Layer (SSL) encryption ensure that the data exchanged in all GoToAssist sessions is completely secure.

- **Firewall Integrity and Compatibility.** GoToAssist uses HTTP outbound connections to transparently enable screen-sharing sessions even with corporate firewalls in place. In most cases, both the end user and the support agent can connect to the GoToAssist servers without re-configuring firewall settings.
- **End-User Permissions and Control.** The end user is always in control of a GoToAssist session. GoToAssist is 100% permission-based; the end user can see at all times what is being done to his/her system and can end the session at any time. Plus, the end user always has overriding mouse and keyboard control throughout a session.
- **Highly Secure Data Centers.** GoToAssist data centers are protected with continuous intrusion detection and are SiteSecure Certified by Cybertrust Corporation.
- **Dependable and Scalable Architecture.** Built-in redundancy and fault tolerance ensure that there is never one single point of failure, and the system is monitored 24/7 to make sure that GoToAssist is always available. The GoToAssist architecture also scales easily with demand.
- **High-Performance Technology.** Network Path Selection and Fast Failover enable faster performance by automatically determining the optimal connection path between two points and rerouting to another ISP if the original ISP's service fails or is degraded.
- **Connection-Speed Flexibility.** GoToAssist's patented Bandwidth Adaptive Technology and screen-capture algorithm enable organizations to engage in support sessions with all end users, even those with connections as slow as 28.8 kbps.

ENDNOTES

¹ Wood, J.B. 2009. *Complexity Avalanche: Overcoming the Threat to Technology Adoption*. San Diego, CA. Point B Publishing.

² Lah, Thomas E. 2005. *Mastering Professional Services*. Professional Services Press.