

**GoTo**Assist®

# Citrix GoToAssist Corporate Remote Support White Paper

Improving first-call resolution with team  
collaboration technology.

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It's been described as a love-hate relationship. Customer support reps love solving people's problems and customers hate it when reps can't satisfy their every request. Working the front line in the battle to keep customers satisfied, one of the support team's primary objectives is first-call resolution—the key to customer retention. However, when issues aren't resolved in a single call, problems emerge.

Directors of customer technical support face major challenges, including the need to speed support calls, reduce customer transfers and ensure new reps are quickly brought up to speed. When problems spin out of control, loyalty is damaged—leaving the door open to a lost customer.

Whether callers struggle to fully convey their problems or can't follow simple instructions, support reps must find ways to break through and solve challenges. When agents are perplexed or cannot see obvious solutions, the result is often long hold times, call transfers and poor customer experiences.

How can support reps quickly solve problems when they reach a dead end? Is there an easy way to bring experts into a support session without hindering the customer experience?

To meet these challenges, many companies are turning to collaborative remote support solutions. Designed to effortlessly bring peers, supervisors and experts into a shared support session, these solutions enable reps to share screens and remotely work together on a customer's computer—solving customer issues in a single session. This white paper will examine key customer support challenges and reveal the many advantages of collaborative remote support.

## Trends impacting customer support

Economic uncertainty makes retaining customers essential. Businesses cannot afford to lose customers due to poor service. Indeed, a study by Forrester shows service is more important than price. “The data is compelling: Customers care about customer service. Companies can differentiate themselves by upgrading their service experiences,” found the study.<sup>1</sup>

The old adage that it's easier to keep a customer than gain a new one still rings true. Acquiring a new customer can cost 6 to 7 times more than retaining an existing one, and businesses that, “increased their customer retention rates by as little as 5% saw increases in their profits ranging from 5% to a whopping 95%,” according to research by Bain & Company.<sup>2</sup>

Two of the most effective ways to improve customer satisfaction, the Corporate Executive Board recently reported, are reducing the effort customers must make to solve their problems and improving the overall customer experience.<sup>3</sup>

Quality customer service, not price, is foremost among consumers, despite the economy.

1 Temkin, B. D. (May 15, 2009). Forrester. Customer service trumps price.

2 Hendricks, D. (April 6, 2009). Email Insider. Leveraging existing customer relationships.

3 (2008). Corporate Executive Board. Shifting the loyalty curve.

## New tools making a difference

New technology is allowing customer support departments to leverage the power of the Internet to remotely assist customers in new ways. “Web-based remote support solutions will help companies support a more virtual workplace, cut costs and improve customer service,” stated a Frost & Sullivan report.<sup>4</sup>

In fact, nearly one in four support organizations plan on implementing Web collaboration support tools in 2010, according to the Technology Services Industry Association.<sup>5</sup>

More businesses will likely utilize these new tools in the very near future. “With the economy forcing businesses to do more with less, combined with the shortage of skilled IT workers at each location,” Frost & Sullivan expects the remote support market to, “experience high growth.”<sup>6</sup>

Today’s customer often expects push-button service, creating unrealistic expectations for support staff.

## Challenges that hinder customer retention

Every customer support director wants reps to quickly yet accurately solve customer issues. However, situations often occur that injure the customer experience. For example, some customers simply don’t want to comb online knowledge bases or even be verbally walked through the steps needed to resolve their problems—they just want their problems fixed.

In other situations, customers may be unable to follow verbal instructions or understand the rep. Consider the customer under an extreme deadline who simply cannot think rationally. Today, many customers are so driven by speed that they expect push-button service. When that doesn’t occur, customers get frustrated.

Lengthy support calls often occur when an agent doesn’t fully understand the customer’s problem. This typically means a rep needs to place the customer on hold, call him or her back, or escalate the support call. These situations diminish customer satisfaction and frustrate employees who sincerely want to solve the customer’s problem.

Transferring customers not only lowers their satisfaction, it also greatly increases the cost of service.

## The dreaded transfer

Support agents sit on the firing line, trying to solve problems, prevent complaints and deter call escalation. Customers expect their issues to get resolved on the first call—as does management. Calls can be escalated because an agent lacks the required knowledge or skill set, was unable to properly understand the customer’s problem or emotions prevented good communication (such as a bossy customer working with a tired agent).

Each time a customer is transferred, not only does customer satisfaction drop but costs go up. For example, the salaries of level 2 support reps are significantly higher—sometimes double the cost of regular reps. In addition, transfer cycles prevent an agent from being available for other customers while he or she waits for and briefs another rep to take over the call.

<sup>4</sup> (August 2009). Frost & Sullivan. World web-based clientless remote support software market.

<sup>5</sup> Ragsdale, J. (November 2009). Technology Services Industry Association. Leveraging the web collaboration capabilities within remote support platforms.

<sup>6</sup> (August 2009). Frost & Sullivan. World web-based clientless remote support software market.

New reps don't learn when they escalate calls, creating a vicious cycle that can result in higher employee turnover.

Customer support has greatly evolved over the last decade, moving from pure phone support to Web-assisted technology.

## Training and on-boarding new reps

It's not uncommon for customer service departments to experience high turnover. Training new reps is a costly procedure that can also negatively impact customer service. Unfortunately, many new reps are simply thrown into the fire and must learn as they go.

Although they might spend many hours listening to recordings, it's often not until reps actually begin supporting real customers that they internalize their learning. Bringing new reps up to speed can take weeks or months.

One of the big sources of frustration occurs when reps cannot see what the customer sees. In addition, collaborating with peers to work through issues is no simple task.

If a customer's problems are not fixed, agents must escalate the issue to more knowledgeable representatives. However, when an unresolved situation is transferred to a level 2 rep, new agents don't learn how to solve the problem. So a cycle occurs with new reps never learning how to solve unfamiliar problems. This often leads to poor employee satisfaction and other challenges. A brief examination of the history of customer support will provide further insight.

## Brief history of customer support

In the late 1990s, when customers had problems they simply called a toll-free number. An agent would stay on the line as long as needed to solve the customer problem.

The technology involved to support the customer was rather rudimentary. Reps were fully reliant on their ability to coax insights from customers and walk them through a series of activities. There was no screen sharing, no chat, and collaborating with others to solve a problem was unheard of.

Resolving situations on the first call was a big struggle. In addition, tracking customer incidents as they moved through the system was also challenging. Customers often had to start from scratch with each new support agent they spoke with.

By the early 2000s, technology emerged that allowed screen sharing between a rep and a customer—even over dial-up modems. The ability to see what was occurring on a customer's desktop was a major breakthrough. However, due to security concerns and bandwidth issues, the technology was typically only used by IT help desks to support employee computers preconfigured with special software.

As customers began embracing higher speed DSL and cable-modem Internet connections, the bandwidth issues were resolved. In addition, new alternatives began emerging that did not require any pre-installed software. As support technology evolved, it began to allow screen sharing transfers to other agents and the ability to bring multiple agents into a single session.



Figure 1: Two or more agents can work together to solve a customer problem, seeing and controlling the customer's desktop.

Collaborative remote support allows reps to solve a customer problem on the first attempt without transferring a call.

## The new solution: collaborative remote support

Designed to speed the resolution of complex support calls, eliminate call transfers and quickly bring new reps up to speed, collaborative remote support solutions are transforming customer service departments.

Utilizing advanced software, collaborative remote support solutions combine customer screen sharing and remote control technology with advanced collaboration functions that allow any agent to bring a peer, level 2 support rep, expert or supervisor directly into a customer support session. Now multiple agents can work—seen or unseen by the customer—to remotely resolve the customer's problem in a single session.

These solutions leverage Web-based software as a service (SaaS) applications that manage incoming support requests and allow agents to view and control the desktops of customers without any pre-installed applications or client agents. In seconds, a team can see and control a customer's desktop. Now multiple parties can share a customer's screen and control the remote computer. The applications are numerous and include:

- **Private training:** A new rep, for example, can share a screen with a level 2 agent and privately send chat messages back and forth. This allows the new agent to solve the problem with the invisible support of another agent, all without transferring the call. This helps facilitate learning for new agents.

- **Team collaboration:** A rep can share a problem with a level 2 agent who will work with the rep. The rep verbally explains the problem while the customer is listening. The level 2 agent takes control of the remote computer and begins troubleshooting, while the original agent remains on the line communicating with the customer. This improves the customer experience because a team is now working to solve the problem and the original agent is still with the customer, eliminating any need for the customer to explain the problem again.
- **Manager monitoring:** Managers can watch live support sessions in progress without a rep knowing. This silent monitoring can be used to motivate reps to maintain consistent levels of service. Playbacks can also be used for training.

In this example, two reps work together to install a patch and reboot a customer's computer, while the customer remains on the support call and is automatically reconnected into the support session.

## Example: collaborative remote support in action

A software company has ten support agents working three shifts, along with a manager and director. A few of the agents are level 2 reps and often customer support must rely on developers to resolve more complicated problems.

An experienced level 1 rep has been on the phone with a customer for five minutes and is in a live session, looking at the customer's desktop. Even though the rep has performed a diagnostic test, he cannot solve the problem and doesn't know why. While talking with the customer, the rep looks at his screen to determine which level 2 support reps or developers are available.

An available level 2 rep agrees to assist the customer rep. With the push of a button, they are both examining the customer's screen. The level 1 rep informs the customer that he has brought a peer to assist and explains the problem. The level 2 agent then explains that they'll be performing a patch and asks the customer to remain on the phone.

After the patch is installed, the level 2 rep explains to the customer that he'll be rebooting the computer and to stand by. The computer is remotely rebooted and automatically reconnects to the support session without any customer involvement. Both agents remain on the line while the customer confirms the problem has been resolved.

After the support session is completed, the customer sees a satisfaction survey on her computer. The session is recorded for possible future playback.

With collaborative remote support solutions, customer issues can be easily resolved in a single session, improving customer satisfaction and loyalty.

## Benefits of collaborative remote support

Collaborative remote support solutions provide the following important benefits:

- Increase first-contact resolution and reduce callbacks, lowering the cost of support
- Reduce the length of call handling times so reps can take more calls per day
- Improve the customer experience by enabling support reps to solve the problem without the customer taking any action
- Simplify the ability to bring other agents, experts or management into a support session
- Speed agent training by allowing agents to service real customers with the invisible support of other agents in chat sessions

- Reduce the need to transfer customers
- Provide better customer service by allowing the initial agent to remain on the support call, acting as an advocate for the customer
- Enable help desk agents to easily manage multiple simultaneous sessions
- Provide securely encrypted sessions to ensure customer privacy

## What to look for in a collaborative remote support solution

The ideal collaborative remote support solution should be very easy for agents and customers to use, and it should enable reps to reboot and automatically reconnect to customer computers as needed.

When seeking a collaborative remote support solution, consider the following important requirements:

- **Ease of use:** Seek a solution that is easy to administer and is easy for customers to access. The solution should offer a one-click entry into a session.
- **Rapid entry into sessions:** Agent is able to open a session with a customer in less than 30 seconds.
- **Reboot and reconnect back to session:** Solution allows reps to reboot a customer's computer (even in safe mode) and return to a remote screen sharing and control session.
- **Multi-agent collaboration:** Multiple agents should be able to share a single session with a customer to help address more challenging problems.
- **Scalability and volume:** Solution permits the quick adding of agent seats and can accommodate millions of sessions monthly without any hardware or software installation.
- **Permanent data archival:** Solution can replicate all session data to a local database for permanent storage.
- **Compliance support:** The ideal solution should allow for analysis, audit trails and storage of regulatory compliant support sessions.
- **Silent monitoring:** Seek a solution that allows managers to examine live sessions, unseen by agents or customers, to help ensure high levels of service.
- **Training included:** There should be no extra charges for agent training, ensuring the entire team is properly using the solution.
- **Dedicated support personnel:** Ask if the company provides live no-cost access to a dedicated advocate who is not located in an overseas call center. Providing ongoing access to the same person helps improve the return on investment.
- **Around-the-clock support:** Only work with a company that provides live phone support 24 hours a day, 7 days per week with native English-speaking support reps.

GoToAssist Corporate is the world's leading remote support solution.

## The GoToAssist Corporate advantage

Citrix® GoToAssist® Corporate™ meets all the requirements outlined in this paper. It uniquely enables customer support teams to rapidly resolve customer challenges by easily collaborating with peers and other experts, resolving customer problems in a single session. The result is higher customer satisfaction, lower callbacks, reduced support costs and greater employee retention.

Citrix is the world's original provider of clientless remote support and has built on its ten-year legacy to become the market leader. According to Frost & Sullivan, GoToAssist is the U.S. and global market leader for remote support software.<sup>7</sup> In addition, GoToAssist has won numerous awards from the Stevie American Business Awards and PC Magazine.

The GoToAssist Corporate solution provides many advantages to customer support directors, including:

- **Customer and agent surveys:** Now customer-support management can gain instant session feedback from customers and support reps.
- **Manager silent monitoring:** Managers can view and monitor live remote support sessions without agents knowing, ensuring reps are following proper procedures.
- **Permanent session recording, archiving and integration:** All remote support sessions, chat records, diagnostics and customer feedback are recorded and archived for 90 days on GoToAssist Corporate servers for auditing and training. With the GoToAssist Data Replicator, that data can be easily imported into the company's local servers for permanent storage or integration into CRM solutions.
- **Management center:** Now management staff can easily access team and individual agent metrics, chat session logs and real-time snapshot reports.

Isn't it time you take your customer support to a whole new level? Try GoToAssist Corporate today.

**For a demonstration of GoToAssist Corporate or to learn more about collaborative remote support, please call 1-800-549-8541 or visit [www.GoToAssist.com](http://www.GoToAssist.com). If you're calling from outside the United States, please call +1-805-690-5729.**

<sup>7</sup> (October 22, 2009). Citrix Online. Citrix Online's GoToAssist achieves largest market share in remote support market. Press release.

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