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The Essentials Series: Faster Problem Resolution  
with Efficient Remote Support Capabilities

# Understanding How Remote Control and Diagnosis Addresses Typical User Problems

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by Ed Tittel

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by **Don Jones, Series Editor**

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Don Jones

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# Understanding How Remote Control and Diagnosis Addresses Typical User Problems

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The first two articles in this series explored user-centric remote support solutions, provided an overview of the Help desk situation, discussed key benefits of switching to a Web-based solution, and explained specifics for the troubleshooting process when using a full-featured solution. This article focuses on the actual remote tools used to diagnose user problems, along with management reports that provide valuable metrics to help improve customer support and satisfaction.

## Solving Configuration Problems

When a user experiences just about any computer problem, the two main sources are either hardware or software. Although many hardware problems can be diagnosed remotely, resolution usually requires an IT technician to visit the user's work area or have the unit shipped to the IT department.

Configuration issues, however, can almost always be resolved remotely with the right remote support solution. These solutions save time, travel/shipping costs, and can greatly improve the efficiency in any Help desk operation.

A remote support solution allows Help desk agents to establish control over a user's PC with administrative-level permissions to install/upgrade and configure software applications, modify operating system (OS) settings, and install or upgrade drivers. Real-time connections let agents accomplish such tasks quickly and get users back to work with only minimal downtime. The remote control feature in a support solution is particularly important for mobile workers who may have no alternative equipment to use when problems crop up.

## Rich Online Connection Lets Users Hang Up (or Skip) the Phone

From a Help desk manager's perspective, two of the primary benefits of a remote support solution are improved first-contact resolution and speedier service call resolution. These results are significant, and mean lower overall call volumes owing to fewer repeat calls, and an increased ability to support a larger user population more efficiently.

Users may contact the Help desk for assistance by phone, email, or through a Web form. Once a connection is established between a user and an agent, phone contact becomes optional. The remote support solution opens a viewer window on the agent's computer that displays the user's desktop for screen-sharing purposes. At the same time, a chat window appears on both the user's and agent's monitors through which the parties can communicate one on one.

## Chat Windows

Chat and remote control work hand-in-glove to promote ongoing communication. The agent's chat window includes tools that allow the agent to:

- Select pre-scripted responses and Uniform Resource Locators (URLs) to send to the user
- Initiate file transfers
- Reboot the user's computer, where automatic session recovery following reboot maintains the current session, thereby eliminating callbacks
- Start or stop screen sharing at will
- Perform remote diagnostics and change access levels
- Use annotation tools, such as a pen, arrow, and highlighter, to direct the user's attention to specific parts of the screen

Tools in the user's chat window enable the user to save a chat log, participate in a file transfer, change access levels, and use annotation tools.

### Note

In most cases, organizations find the chat window feature to be a faster, more effective means of communication than traditional phone support. Chat sessions can help agents avoid language barriers and miscommunication with users, reducing the need to escalate the call to another agent.

## Screen-Sharing

The viewer window enables the agent to view the customer's desktop and share control of the mouse and keyboard (if configured to do so). Some remote support solutions also enable the agent to share his or her desktop with the user for guided learning. From the viewer window, the agent can access annotation tools, the chat window, and commands for session transfer, session invitations, reboot/reconnect, file transfers, and remote diagnostics.

## Improved Service Delivery

Remote support solutions provide ease-of-use for the end user and agent alike. The capability to use screen-sharing, remote control, and chat windows enables faster response and more accurate problem solving. Using the remote control feature, agents have complete control of the remote PC for diagnostic and troubleshooting purposes, without needing to rely on the user to provide action, input, or even understand the OS or applications.

Help desk managers gain access to a host of tools that enable ongoing monitoring and observation of agent-user sessions. For example, a management dashboard or console lets managers view real-time status of incoming queries or the status of agents who are logged in. Silent monitoring enables managers to monitor live support sessions to ensure that agents comply with approved support procedures. Managers can also access individual agent and team metrics, chat session logs, and real-time snapshot reports. With the use of automated surveys (covered later in this article), a remote support solution provides increased opportunities for feedback and customer satisfaction.

## Sticky Sessions See Solutions Through to Completion

The concept of a “sticky session” means there’s no need for the user to manually reconnect if the agent must reboot a remote PC. The solution automatically reestablishes the connection to the session in progress. Plus, the support agent remains visible and helpful throughout the session, even when supporting multiple users at the same time.

### Note

Generally, agents may run as many sessions as necessary but are limited to a specific number of users in a multi-user session.

To speed resolution time, team collaboration tools enable support staff to get guidance from managers or help from other agents in the background while a session is live. An agent can also bring in a manager or another agent on a session to provide more in-depth troubleshooting or support, or transfer the user’s session to other support staff for escalation purposes.

Sessions are never dropped or left in a queue to be forgotten accidentally. Queue and help alert windows display incoming requests, requests being transferred, and information about the user and session, such as time of the request, user language, and other important parameters. Managers can monitor all queued requests from a single interface.

## Increased Opportunities for Learning and Training

A user-centric remote support solution also provides multiple means of learning and training. Agents can interact with users for mentoring, learning, escalation, and division of labor.

Screen-sharing allows users to receive guidance from individual agents or through team collaboration, yet still act for themselves. New agents can learn by first watching live sessions, then participating in sessions with another agent or a manager. This system provides a safety net for new agents and improves the overall quality of training, while users get the support they need.

**Note**

Even experienced agents benefit from a virtual over-the-shoulder look at a user session if the problem being resolved is new to them.

## Improved Reporting Reflects Help Desk Activity

Most remote support solutions provide a wealth of preconfigured reports, automated surveys, and the ability to record user sessions. Reports provide key metrics for determining the capacity limits of the Help desk, and provide measurable insight to drive continuous process improvement. Use of satisfaction surveys from users help managers monitor quality of support. Recorded sessions can be analyzed for statistical purposes and further learning.

### Reports

Reports generally include the following information:

- Service call duration, resolution, and success metrics
- Agent characteristics
- Entire Help desk time, resolution, and satisfaction statistics

Managers may run reports daily, weekly, or monthly, or customize reports to cover a range of dates. Reports may also be configured to run automatically and be sent to a specified email address.

### Surveys

Many remote support solutions deliver a built-in survey to the user automatically at the end of a session. The user may complete the survey to provide instant feedback on the effectiveness of the agent during the session (to resolve a problem, provide training, and so on). The system stores survey results as satisfaction metrics, which are viewable by the Help desk manager and can be shared with the agent as a learning tool and as part of an organization's employee reward and recognition program.

**Tip**

Managers may use collected survey data to prove the value of Help desk operations to the organization by demonstrating high levels of service and satisfaction.

### Session Recording

Many remote support tools automatically record user sessions for training and quality assurance. Managers can export remote-support sessions, chat, diagnostics, and customer feedback to a local server to run analysis tools or incorporate the data into a customer relationship management (CRM) system, then archive the data to permanent storage.



## Summary

Ultimately, a user-centric remote support solution can solve many of a Help desk manager's pain points: boost productivity of the internal support team, remotely diagnose systems, support mobile workers, decrease call-handling time, and increase first-contact resolution. All of these benefits not only improve typical Help desk metrics and performance measures but also can help ensure a quick return on investment (ROI) in state-of-the-art, user-centric remote access and management software.