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

Setting the Stage for User-Centric Remote Support

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Introduction to Realtime Publishers

by **Don Jones, Series Editor**

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Don Jones

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Setting the Stage for User-Centric Remote Support

When it comes to providing remote user support, the biggest winners in this effort should be the users themselves, who can invite qualified professionals onto their desktops to help them solve problems and address technical issues. By fostering user-oriented remote support, however, organizations can also boost Help desk productivity and reduce time to resolution for user issues. This creates a second win for Help desk operations at the same time.

This article is geared toward small to midsize organizations with a base of 500+ employees. However, the concepts of remote support and the solutions described in this article can benefit organizations of all sizes.

The Support/Service/Help Desk Dilemma

Today's IT Help desk is expected to provide high-quality customer service in an increasingly complex and mobile environment. Many companies run a mix of operating systems (OSs) or varying editions of the same OS on hardware from different manufacturers. Although organizations may standardize on an office productivity suite, employees may use different versions due to budget restrictions on upgrading all packages simultaneously. Some employees also require specialized software, such as graphics, computer-aided design (CAD), or modeling packages.

At the same time, mobile computing is on the rise, with many employees needing to work from customer sites, between main and branch offices, and from home. Those employees need laptops with secure Ethernet, Wi-Fi, mobile broadband, and dial-up modem connectivity so that they can connect to the Internet any place, at any time. All of these technologies fall to the Help desk to support, where the majority of user requests must be handled remotely.

With the usual long queues of users needing help, Help desk managers constantly seek more efficient and cost-effective ways to:

- Increase the productivity of their internal support teams
- Remotely diagnose systems
- Support mobile workers
- Decrease call handling times
- Boost first-contact resolution rates
- Ensure business continuity

The Help Desk Situation

Remote and mobile users are spread across offices, cities, and even countries. What once was a labor-based local workforce has evolved into a knowledge-based distributed workforce, with IT technology high on the priority list.

Supporting a remote employee in the traditional Help desk style—solely over the phone or via Web chat—becomes an exercise in “working by feel.” The agent listens to the caller describe a computer problem, and asks questions to gain more insight. The type of caller can make a big difference in how quickly the problem gets resolved. More technically savvy and level-headed computer users tend to work with the agent, eager to “fix it” and move on. Other users aren’t as cooperative, for myriad reasons, and can make the agent’s job much more demanding and frustrating. The latter type of Help desk incident can easily turn a 5-minute call into a 20-minute call, or more.

Such delays lower customer satisfaction and spawn complaints to management. Worse, the problem can go unnoticed by Help desk managers who don’t have the proper tools to help them monitor user-agent interactions. In addition, Help desk personnel are often measured by the number and length of calls taken and resolved—a series of long, drawn-out support calls can skew the statistics of an otherwise competent worker.

To be efficient, the Help desk agent needs visibility of the caller’s PC—a way to “see” what the caller is describing. Help desk managers need visibility into the entire Help desk operation to understand strengths and weaknesses of the process, and to coach their team on more effective support techniques.

Note

Early remote support solutions consisted of screen-sharing programs that enabled IT personnel to access a PC and attempt to diagnose problems. The solutions worked reasonably well for employees within the corporate firewall. However, traveling employees used slow dial-up connections and had to make sure the software was installed leaving on a trip. If the software wasn’t preinstalled, more time was spent at the beginning of a support call helping the mobile employee through setup and configuration.

Emerging Trends Boost Urgency

The mobile workforce is expanding. According to IDC’s Worldwide Mobile Worker Population 2009–2013 Forecast (December 2009), the world’s mobile worker population will grow from about 1 billion in 2010 to nearly 1.2 billion by 2013. That means potentially more Help desk activity, which will need to be handled in less time to meet increasing demand for such services and support.

Help desk managers must also work within financial restrictions: Many businesses see profit margins tightening, while government agencies have to maintain service levels on reduced budgets. It all comes down to doing more with less. Because personnel is usually the largest expense in any organization, accomplishing more with existing staff is a necessary strategy to improve the bottom line.

Streamlining the Help desk process—by handling incidents more efficiently and resolving more issues on the first interaction—creates a less-stressful and more productive work environment. Employee morale is boosted, which leads to less turnover. With a general industry shortage of good Help desk staff, high morale and low turnover are significant considerations for managers seeking remote support tools.

Note

Keeping agents happy is important to many Help desk managers, and providing the right tools can be a key element in fostering employee job satisfaction. A reliable, fully featured remote support solution can increase productivity immediately, and improve employee and customer satisfaction over the long term.

Finally, senior management is often concerned about workforce continuity. The results of disasters in recent years, such as hurricanes, floods, and pandemics, have escalated concerns by management to ensure business continuity regardless of conditions. This puts additional pressure on Help desk personnel to be able to support users in adverse situations, or to continue providing support when their own environment is diminished.

Present-Day Problems: What's Needed?

Many Help desk managers struggle with operational problems and technical logistics they want to eliminate. Although these issues vary among organizations, they come down to a common set of issues and resolutions. To run a well-oiled Help desk, today's managers require the following:

- Speedy resolution for problems—Help desk calls must be handled as quickly as possible while providing quality customer service.
- Lower first-contact resolutions—The goal is to minimize the number of repeat calls. This enables Help desk personnel to support more users more efficiently.
- Web-based Software as a Service (SaaS) solutions—Users only need a Web browser and Internet connection, commonly used by organizations and individuals, to place support requests and get help. No preinstalled software or client agents are required nor are firewall reconfigurations.

Note

SaaS is a type of third-party hosted service that provides Help desk remote support tools, and much more. You purchase services on a monthly or per-use basis, which greatly reduces in-house hardware and software costs in addition to IT support effort. Managers get predictable expenses, more accurate budgets, and the flexibility to increase or decrease service levels as needed.

- Quick and simple access for remote and shared control—Remote support tools must initiate connections quickly and allow for shared control of a user’s PC.
- Opportunities for users to be guided and steered—Some users just need training or “how-to” assistance to help them become more self-sufficient. A remote support tool should include real-time screen sharing so that a user can watch an agent demonstrate a task.
- Opportunities for users to learn by watching and doing—A remote support tool should provide for shared remote control. This enables an agent to change the remote system while the user observes, or hand control back to the user while the agent monitors the action and provides feedback.
- Opportunities for agents to learn by watching and doing—Managers or other team members can take control of the session while the initial agent watches and learns how to resolve the issue.
- Open doors to deliver service or content and resolve incidents—A remote support tool should include file transfer and diagnostics as well as remote control and assistance. This creates a complete solution for identifying and repairing problems and issues.
- Increased customer loyalty through user-centric soft skills—By enabling end users to observe and learn from diagnosis and repair activities, and to allow Help desk staff to instruct users on how to perform various activities on their own desktops, organizations benefit from reduced problem resolution times and improved Help desk productivity. They also provide users with opportunities to learn, and to do so by watching, then doing for themselves.

Remote Sessions to the Rescue

Many organizations are opting for user-centric remote support as a comprehensive Help desk solution. These types of solutions are designed to speed the resolution of support calls and resolve problems on the first attempt. Help desk personnel can view and control the desktop of any user, anywhere, using highly secure connections.

Customer-Facing Support

With user-centric remote support, users can request assistance over the phone, on the Web, or via email. A user can select a specific agent to work with, or the system adds the request to a queue to be picked up by the next available agent. Once an agent accepts the request, a remote session is established quickly with the user’s computer. This is referred to as rapid entry into sessions.

Tip

Look for a solution that allows an agent to open a session with any mobile or remote employee in less than 30 seconds.

With permission from the user, the agent takes control of the remote PC just as if the agent were physically in front of the computer. Remote diagnostic tools enable the agent to check the system configuration and gather details to diagnose the problem. The user can see every task being performed, and can resume control at any time.

Beyond screen sharing, this type of solution also enables:

- File transfers for updates and patches—Agents can install system updates and patches on a remote PC as part of routine maintenance.
- System reboots with automatic reconnection—If a reboot is needed during a user-agent session, the session resumes automatically when the new connection is made.
- Chat sessions while sharing screens—The user can open a separate window to exchange chat messages with an agent during screen sharing.
- Team collaboration—The initial agents and a supporting agent or manager can resolve a user’s problem together, either visibly or invisibly to the user.

Tip

Look for a solution that uses compression technology to enable real-time support for all users, even while connected to users overseas or far away.

Behind-the-Scenes Support

In addition to assisting users, agents can help each other through the system. For example, if an agent encounters an unfamiliar problem while in a user session, the agent can request help from another agent using team collaboration tools. This assistance occurs in the background without the user’s knowledge or involvement. An agent can also seamlessly transfer the session to another agent, if that proves necessary or desirable.

Management Support

A user-centric remote support solution provides a number of essential management features. Help desk managers work from a management dashboard to get a complete view of live sessions, silently monitoring and observing the quality of customer service that team members deliver. Monitoring live sessions is also an effective training tool for new agents, who can learn the interface while seeing how experienced agents respond to and resolve a variety of issues for users.

Each interactive session, whether it’s between agents or an agent and a user, is recorded. Managers can get complete information about each session, including system diagnostics, chat transcripts, screen sharing, and team collaboration. A remote support solution archives sessions for a predetermined number of days (perhaps 90), and then gives you the option to export sessions from the SaaS server to your local storage.

One feature of a remote support solution that enhances customer satisfaction is the ability to submit post-session surveys. Upon completion of a session, users are provided an electronic survey to rate the quality of the agent and overall service. Agents and managers receive the feedback, which they should use to improve customer service skills and delivery.

Managers also benefit from custom reports that provide metrics about call volumes, call handling times, and first-contact resolutions. You can generate additional reports that contain user satisfaction data to evaluate individual agent, team, and company performance.

Tip

Once you export saved session data and store it locally, you can use your own business intelligence tools to fully analyze the data and run reports.

Coming Up Next...

The second article of this series explores Help desk troubleshooting and how the process is simplified with a user-centric remote support solution.