
How to Leverage Web Collaboration Capabilities within Remote Support

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A Joint Research Paper from TSIA and Citrix Online
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EXECUTIVE SUMMARY

Despite the economy making incremental spending on technology difficult, one of the bright spots in the 2011 TSIA Member Technology Survey was web collaboration. This annual survey, which tracks adoption, planned spending and satisfaction across 24 categories of services technology, found that nearly one quarter, 22%, of technology support organizations have approved budget for web collaboration tools in 2011-2012. Since publishing the survey results, TSIA members have been inquiring: Exactly what is this functionality and how are companies leveraging it for technical support? This report provides a functional overview of web collaboration, including a description of eight distinct web collaboration modules, their applicability for technical support, and the business case for the functionality. Support management should investigate how web collaboration can be used to improve service levels, reduce operational costs, provide competitive differentiation, and identify the functional modules worth evaluating for their particular environment.

WEB COLLABORATION: INSIDE AND OUTSIDE THE FIREWALL

According to the results of TSIA’s 2011 Member Technology Survey, overall technology spending has remained strong, with areas of service and support technology offering high potential for return on investment and/or competitive differentiation showing increased planned spending. Web collaboration is definitely on that list, with 22% of technology firms having funds allocated for a purchase in 2011-2012.

As seen in Figure 1, web collaboration is fairly well adopted by TSIA support services members, especially larger firms. Over half of all members, 54%, are currently using web collaboration. Members with revenue between $1 billion and $10 billion have 62% adoption; 56% of companies with over $10 billion in revenue are now using web collaboration.

Also shown in Figure 1 is the percentage of member companies with spending planned on web collaboration in 2011 and 2012, with significant investments planned across all sized companies. A full third of the largest firms, those with over $10 billion in revenue, have funds earmarked for web collaboration.
Since the results of the 2011 TSIA Member Technology Survey were published, TSIA Research has received multiple inquiries from member companies asking for more information on web collaboration: Exactly what is it, how is it being used within technical support, and what is the business value of the technology? This report will attempt to answer these questions.

**Web Collaboration: A Broad Set of Tools**

Web collaboration is a general term for a broad set of tools, some with clear applicability to technical support. Other collaboration tools are widely used in non-technology support, primarily financial services and consumer banking/lending, and by departments outside of support, such as sales and professional services. Two things to keep in mind when reviewing available web collaboration features:

- **Some features overlap.** There is a fine line between some features, such as desktop sharing, web chat and team collaboration, and features may be called different things by various technology providers.

- **Some features cannot be purchased individually.** Collaboration tools are typically sold in bundles, and some features, such as web chat and supervisor silent monitoring or agent-to-agent chat, may not be available for purchase except as part of a remote support platform.
The following functional modules are considered by TSIA Research to be a part of web collaboration and are available from best-of-breed remote support providers:

- **Web chat: agent-to-customer.** Web chat is an online assisted support channel for customers. A “click to chat” button is available on a company’s web site, and if a customer needs assistance they can select the control and be put in queue for a chat session with an agent or support technician. Web chat offers an easy transition for customers from unassisted service to assisted service and can save time for the agent by providing the context for the interaction, such as what web page the customer is viewing when they select the chat option, and/or a list of previously visited web pages.

- **Web chat: agent-to-agent/supervisor.** Employee chat tools are becoming more popular during a support session as they allow support techs to quickly ask a peer or supervisor a question while working with a customer, avoiding callbacks or long hold times. Also, for home-based employees, web chat becomes a critical tool, since asking questions across the aisle or cubicle wall is not an option.

- **Screen/desktop sharing.** Using an Internet connection between two computers, one user can view the screen of the other user. Screen sharing is useful for showing a data file that is difficult to send, such as a work in progress, or for one user to demonstrate a procedure for another. This has applicability in technical support to allow a support tech to show a customer how to complete a process or workflow, or how to access and navigate a self-service site. Basic screen-sharing capabilities allow only the support agent to view and take control of another computer.

- **Remote control/remote support.** One step up from screen or desktop sharing, remote control allows one user to take control of another user’s computer. During the session, communication can be either by phone or via an embedded web chat tool. Typically there are security options allowing a user to grant view and control access for a single window on their desktop or the entire system. Because of the security risks in granting an external user access to your system, remote control products include some sort of audit trail or session recording to track exactly what happened during the remote control session should complaints arise later. Remote control is one of the most common web collaboration features used by TSIA Support Services members.

- **Supervisor silent monitoring.** A relatively new feature introduced by web collaboration vendors is supervisor silent monitoring, currently available as a part of some premiere remote support suites. This feature, used for quality monitoring and training purposes, allows supervisors to monitor any remote support sessions in progress without the support tech or
customer knowing they are observing. Should the support tech run into problems, the supervisor may make his or her presence known via the imbedded web chat module and actually take control of the session and drive it to conclusion.

- **Visible/invisible team collaboration.** This feature allows support techs to ask one or more product experts, such as a supervisor or Tier 2 technician, to join the web chat and/or remote support session, giving the experts full view of everything happening during the session. Leveraging the silent monitoring capabilities, the experts may participate in full view of the customer, or they may stay invisible to the customer, offering insight or coaching to the primary support tech while leaving them in control of the interaction from the perspective of the customer.

- **Page push.** A feature common in consumer call centers, page push allows an agent to “push” a particular web page to a customer’s browser. This feature can be used to show a customer a knowledgebase article or other online information that answers their question, or to push an acknowledgement or license agreement to the customer to accept or deny as part of an install procedure.

- **Joint form fill.** Another feature more common in consumer call centers than tech support, joint form fill allows a customer and an agent to view a form simultaneously, with both having access to fill in fields. A good example would be when assisting a customer with an online loan or account application.

- **CRM integration.** An advanced and recent feature by remote support vendors is integration with CRM systems, such as Salesforce. This allows agents to immediately resolve customer issues by initiate a remote support session directly from a Salesforce case record. Additionally, all session details are automatically captured as Activity History in Salesforce.

**Show Me the Money: Business Value for Web Collaboration**

TSIA Support Services members know that in order to gain approval to evaluate new service and support technology, clear business value must be demonstrated. In *Table 1*, the customer and business impacts of each of the functional modules of web collaboration are outlined. In general, improvements can be made to core operational metrics such as first-contact resolution, average resolution, and even customer satisfaction.
**Table 1: Business and Customer Impacts for Web Collaboration**

<table>
<thead>
<tr>
<th>Web Collaboration Module</th>
<th>Customer Impact</th>
<th>Business Impact</th>
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| Web chat: agent-to-customer | • Easy transition from unassisted to assisted support.  
• Allows customers to ask quick questions while keeping them in their channel of choice: the web.  
• Web chat is a popular channel for younger demographics. | • In less complex environments, agents can handle multiple concurrent sessions, boosting productivity.  
• With contextual information provided (current page, recent pages visited), agents have automatic context for the question, cutting handling time. |
| Web chat: agent-to-agent | • Faster resolution time.  
• Increased first-contact resolution.  
• Support techs can ask questions while the customer is on the phone without placing them on hold.  
• Incidents can be resolved without callbacks.  
• Faster onboarding for new agents. | |
| Screen/desktop sharing | • Allows customers to demonstrate their problem instead of explaining it.  
• Customers instantly understand recommended procedures when they can see them performed. | • Reduced resolution time and higher first-contact resolution rates because agents can “see” the problem.  
• Increased adoption of online tools because agents can demonstrate use. |
| Remote control/remote support\(^1\) | • Higher first-contact resolution.  
• Shorter resolution time.  
• Easier resolutions without customers having to perform recovery procedures. | • Instead of explaining complex procedures, agents take control of the customer desktop and perform diagnostics, execute procedures, or adjust settings.  
• Case studies show remote support improves first-contact resolution, cuts incident handling time, and raises customer satisfaction. |
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<tr>
<td>Supervisor silent monitoring</td>
<td>• Faster resolution time.</td>
<td>• Improves resolution time, first-contact resolution, and customer satisfaction by intervening when agents are struggling to resolve an issue.</td>
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<td></td>
<td>• Increased first-contact resolution.</td>
<td>• Provides quality monitoring capabilities much less expensively than traditional QM suites.</td>
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<td>• Customers do not become frustrated with new agents because supervisors can provide real-time coaching.</td>
<td>• Faster onboarding for new agents.</td>
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<tr>
<td>Visible/invisible team collaboration</td>
<td>• Faster resolution time.</td>
<td>• Improves resolution time, first-contact resolution, and customer satisfaction by leveraging additional expertise to resolve an issue.</td>
</tr>
<tr>
<td></td>
<td>• Increased first-contact resolution.</td>
<td>• Faster onboarding for new agents.</td>
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<td></td>
<td>• Higher customer trust and confidence in the agent when invisible expert assistance allows the agent to have the right answer, every time.</td>
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<tr>
<td>Page push</td>
<td>• Customers find needed information faster.</td>
<td>• Increases self-service success by showing customers available data online.</td>
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<td></td>
<td>• Customers learn how to access information on their own for future sessions.</td>
<td>• Reinforces information or procedures by pushing required information to customers.</td>
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<td>Joint form fill</td>
<td>• Easier for customers to complete complex forms and applications.</td>
<td>• Agents can actually see applications/forms and assist customers, raising completion rate and form accuracy.</td>
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<tr>
<td>CRM integration</td>
<td>• Faster resolution time.</td>
<td>• Improves resolution time, first-contact resolution, and customer satisfaction by leveraging recorded data.</td>
</tr>
<tr>
<td></td>
<td>• Increased first-contact resolution.</td>
<td>• Saves agent time by automatically storing session data into CRM tool.</td>
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<td>• Customers do not become frustrated by explaining previous issues to agents.</td>
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Citrix Online Rated Top Web Collaboration Platform by TSIA Members

In the annual TSIA member technology survey, companies are asked to rate their satisfaction with existing tools using a five-point scale, with one indicating “extremely unsatisfied,” and five indicating “extremely satisfied.” The results are shown in Figure 2.

**Figure 2: Member Satisfaction with Web Collaboration Platforms**

The average satisfaction score for all products with 3.78. Of all the web collaboration products used by TSIA members, Citrix Online received the highest satisfaction rating, a 4.29, considerably higher than the next highest rated platform, which received a 4.0. The remaining products were rated below 4.0. Members attribute the high satisfaction ratings to the breadth and depth of Citrix Online products, ease of use by employees and customers, an on-demand model which is fast and easy to deploy, security and privacy controls, and actionable reporting dashboards and supervisor controls.

Source: 2011 Member Technology Survey
CITRIX ONLINE AND TSIA RECOMMEND:

With an increasingly distributed workforce and more web-savvy customers, web collaboration technology is a great fit for technical support. Adoption of these tools is already high for larger companies, and adoption is growing among smaller firms as the return-on-investment story becomes clearer. TSIA Research asks members to keep the following recommendations in mind when considering new or replacement web collaboration technology.

- **Beware of freeware.** Basic web chat and desktop sharing can be had for free and are often bundled into e-commerce servers and other IT and support tools. But keep in mind, you get what you pay for. Lower-end and freeware products offer less security, little or no audit trail, and integration to an incident management or knowledgebase system may be nearly impossible.

- **Consider deployment options.** Consider collaboration tools available via software as a service (SaaS), also known as on-demand. In addition to lower upfront costs, SaaS web collaboration products offer additional benefits, including moving some security concerns to the provider, eliminating scalability concerns, and allowing remote employees to easily access technology from any Internet-ready computer.

- **Don’t put off integration.** Introducing web collaboration tools, especially for customers, means adding a new layer of interactions that will not be captured by your existing incident management system, further eroding your ability to do cross-channel reporting and root-cause analysis. Select web collaboration products that have a successful history integrating with your existing incident and knowledge tools, and target these integrations for the first phase of the project—if you put it off, it will never happen.

- **Require collaboration functionality within your remote support platform.** Adding best-of-breed collaboration capabilities does not necessarily mean adding new vendors to your list of technology providers. The functional modules described in this report are all available from industry-leading remote support platforms. Before evaluating niche solutions, first check what capabilities are offered by incumbent vendors, whose web collaboration modules will be pre-integrated and will likely cost considerably less than purchasing another third-party solution.
ENDNOTES

1 For more information on the ROI impacts of remote control, see the August 2007 SSPA Executive Insight, "Building a Business Case for Remote Support: Improvements in Key Operational Benchmarks Create Reliable ROI Model."