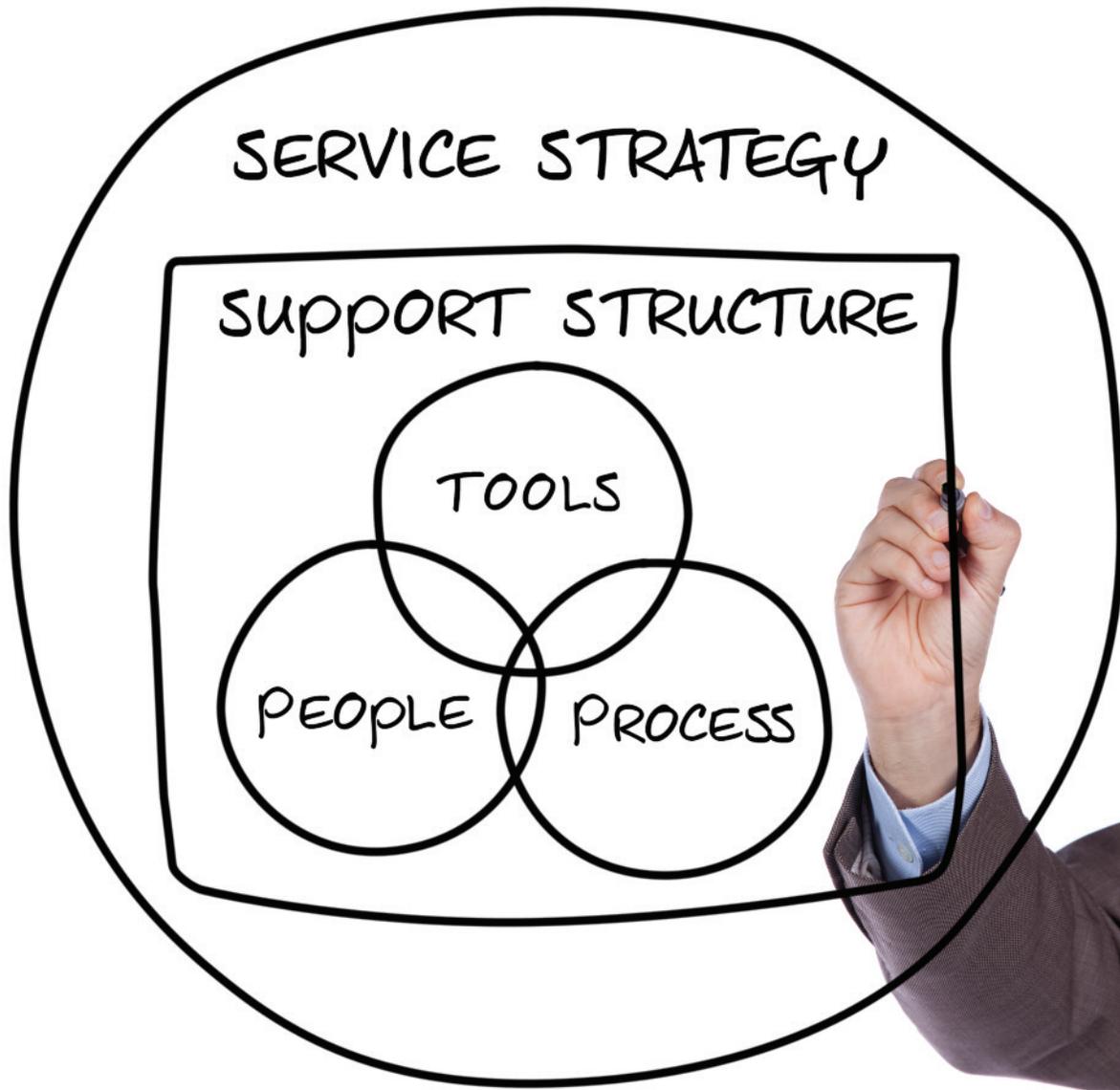




# The Complete Guide to Purposeful Support Practices

UTILIZING FIVE CONTINUOUS IMPROVEMENT AREAS OF FOCUS FOR ALIGNING  
STRATEGY AND INCREASING FIRST CONTACT RESOLUTION WITH A  
RENEWED KNOWLEDGE MANAGEMENT PROGRAM



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*This guide outlines the path to an aligned service strategy, structure to support and govern people, integrated processes and tools supported by a balanced performance scorecard.*

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## Introduction: Purposeful Support Practices

Today's demanding business and service environment is unforgiving, especially for those who service customers, technology and the organization. Customers expect that companies who want their reoccurring business will consistently meet and exceed their expectations. The employee or customer who relies on technology as a productivity tool trusts that the Support Center is sufficiently well-equipped and knowledgeable to quickly understand the issue and resolve it. The only thing that matters is that the Support Center quickly returns them to productivity — with little to no pain! Exceeding customer's expectations time and time again only happens when service and support leaders have an aligned service strategy, a strong structure and purposeful support practices.

Service leaders who define strategy, prioritize tactics and manage operations will be challenged over the next five years to improve the Support Center's performance while integrating business and technology initiatives. These include cloud computing (providing IT services, not infrastructure), mobile computing, global workforce support and team virtualization (smaller, greener footprint). Designed according to the realities of the reactive day-to-day support operations, the purposeful support practices have a more practical, common-sense approach to implementing support processes.

| STRATEGIC                                                                               | TACTICAL                                                                                                                    | OPERATIONAL                                                                                                                 |
|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Creating long-term vision, goals and objectives based on achieving a desired end result | Implementing projects or continuous improvement activities moving you closer to achieving your strategic goals / objectives | Repetitive activities that are the day-to-day core processes that achieve the tactical performance goals, objectives & SLAs |

“It's tough to be strategic when you are delivering daily operations tactically.”

**Service leaders must allocate the right amount of time for strategic thinking and initiatives to (1) align goals and objectives, (2) establish directives to govern scope of services and (3) build success metrics to measure business value.**

As service leaders examine and assess their operations, they must automate and integrate the support technology into the process workflow, empowering and enabling the frontline service representatives.

## In the pursuit of operational excellence, be mindful to always:

- 1. Know where you are** — Assessing your current performance around service strategy, structure (support model), process, people, tools and metrics is an all-important baseline.
  - Track progress against the continuous improvement roadmap.
- 2. Know where you are going** — Envisioning the end result is a core part of defining your service strategy.
  - Determine the right outcome for the customer and the business.
- 3. Know how you plan to get there** — The continuous improvement roadmap is the result of your gap-analysis assessment against your future-state.
  - Decide how you will get from where you are to where you want to be – using established targets of success metrics positioned along the journey.



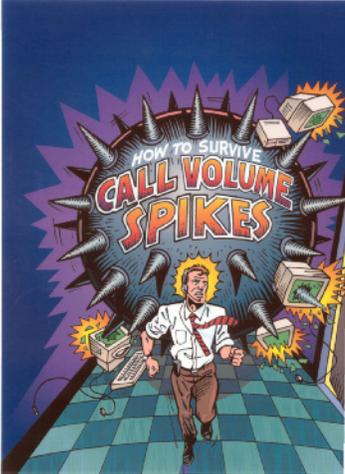
This guide highlights how the integration of the Citrix Online GoToAssist® and GoToManage® solutions with the purposeful support practices helps businesses increase revenue (customer satisfaction, loyalty and retention) while reducing support cost (quicker problem resolution).

### The Five Purposeful Practices are:

- 1. Achieving First Contact Resolution**
- 2. Making UFFA a Priority**
- 3. Mapping Call Types for Action**
- 4. Introducing Customer-Impacting Technologies**
- 5. Balanced Scorecard Storytelling**

Leading technology solution providers like Citrix Online are committed to improving the customer experience by quickly delivering a return on the tool investment and strengthening the team's performance. By keeping focused on purposeful support practices, the Support Center is in the best position to utilize technology and process to:

- Resolve difficult problems faster
- Increase first contact resolution
- Deliver a more consistent and memorable customer experience.



Click on “Call Volume Spikes” to Access Our White Paper For Proactive Tips on Successfully Managed Call Volume Spikes.

## Proactively Manage the Demand

Normally, customer demand for support is simple to meet. The Support Center provides customers with access channel choices (e.g., phone, chat, email, self-service portal, etc.), and the customers then select the appropriate contact method that best suits their preference, their situation and the urgency of their issue. However, large groups of customers may occasionally contact the Support Center at the same time when a service disruption or outage occurs. These incidents significantly impact the ability of the Support Center to consistently meet established service level commitments. How well you prepare and manage any crisis will reflect on your leadership, as well as the capability and maturity of your Support Center.

Customers expect to be able to choose how they request service. Here are some key considerations that should be made before allowing customers to access the Support Center through multiple channels.

- **Discontinue supporting customers through different “band-aid” incident, request and resolution management processes that use old software, non-integrated tools and heavy customization — all of which limits additional functionality and capability!**
- **Provide the same customer experience across all access “touch-point” channels.**
- **Automate and integrate all processes / technologies into one tightly unified, efficient way to deliver service and support.**

No matter what channel customers access, it’s important that they are positioned to receive rapid response and rapid resolution. Knowing when and how to utilize the tool is critical for “speed to resolution.” This consistent handling process also needs to be secure, seamless and effective.

For example, when integrating chat and remote support, representatives should be prepared to easily handle specific, just-in-time training opportunities. A purposeful support practice would be to resolve more issues at first contact (FCR). When a customer’s issue or question is not resolved on first contact, the ripple effect becomes time-consuming and expensive. If FCR is not possible, the representative should request a preferred time and contact method before letting the customer go. This simple action eliminates a costly exchange of emails and phone calls trying to reconnect with the customer to resume the resolution process.

All Customers  
All Access Channels



One consolidated,  
streamlined, efficient,  
cost-effective and integrated  
process / tool / people

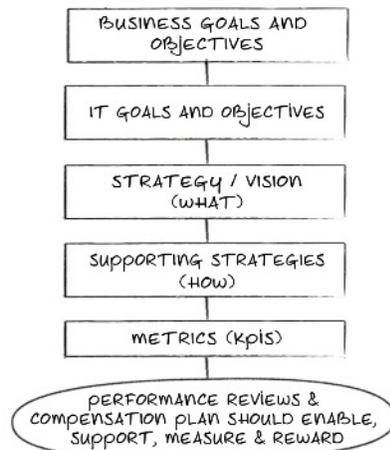
# Service Strategy

“Strategy without tactics is the slowest route to victory.  
Tactics without strategy is the noise before defeat.”

*Sun Tzu (Chinese General and Author, b.500 BC)*

In my many consulting engagements and conversations with senior support managers, I’ve found that the leaders are separated from the followers by the creation of a Service Strategy. Service leaders must allocate the right amount of time for strategic thinking and initiatives to **(1) align**

**goals and objectives, (2) establish directives to govern scope of services and (3) build success metrics to measure business value.** The service strategy is the “place mat” at the executive table. A flexible and adaptive strategy and support structure can allow you to respond quickly to changing customer preferences, market conditions and competitive threats. I recommend continued investments in technology, resources and leadership that enhance the customer experience, reduce operational costs and create opportunities for scaling the business without the additional expense.



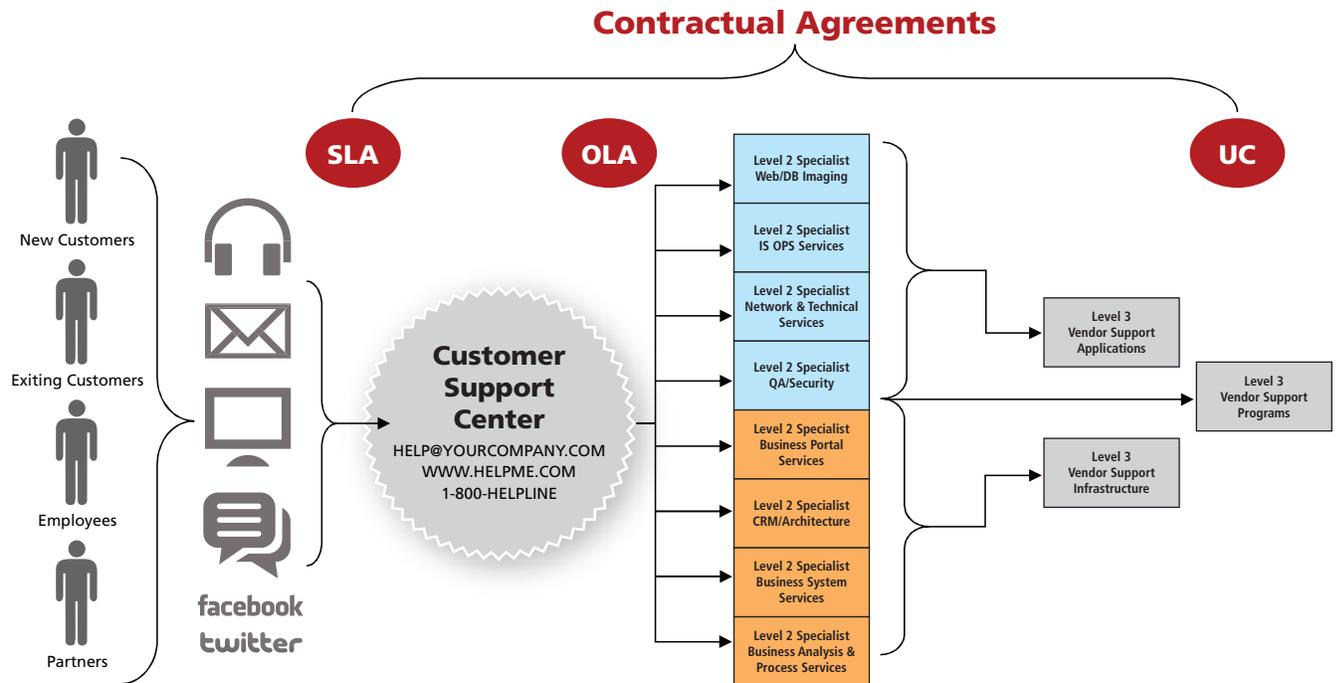
The “shift-left” service strategy is to simply identify where issues are resolved in the tiered support model (who resolves what) and target repetitive and reoccurring issues for resolution closer to the customer (e.g., First Contact or Self-Service). The ultimate success is achieved by eliminating issues / calls through Problem Management and Root Cause Analysis (RCA):

1. Examine all issues, questions and requests and where they are ultimately resolved — shift resolution to the most-efficient and cost-effective resources.
2. Track percentage of resolved cases by resource, team, and location along with cost, utilization and effectiveness metrics.
3. Calculate cost per call / contact / resolution along with plans to shift resolutions closest to the customer and lower costs.

The “shift-left” strategy also benefits by separating incidents from Service Requests (SR). This positions the Support Center to redirect Service Requests (SR) to the self-service portal where completed online forms are automatically routed to the assigned group for fulfillment. Whereas incidents, governed by the Service Level Agreement Priority Model, are reported by customers via their preferred channel to be routed, responded and resolved in accordance with its priority assignment.

The objective of the IT Infrastructure Library-based Incident Management process is to minimize the productivity impact to the customer and employee by resorting them as soon as possible. Reactively, it works. Proactively, we need to incorporate a more strategic, focused approach that includes call deflection (self-service) and call elimination (root cause as analysis).

This white paper highlights the **Purposeful Support Practices** involving the integration of tools, people and process with a discipline around measuring and reporting.



### Guaranteeing Seamless Transparency and Service Delivery



### "Shift-Left" Strategy



SLA = Service Level Agreement  
 OLA = Operating Level Agreement  
 UC = Underpinning Contract

# Purposeful Practices

**Best and Good Practices** in the support industry are plentiful. They are made available to practitioners and service leaders through industry standards and frameworks such as **IT Infrastructure Library v3** (ITIL v3), the **Capability Maturity Model** (CMM), **Control Objectives for Information and Related Technology** (COBIT), **HDI Certification Standards and Courses**, Next Practices in **Business Service Management** and the many Best Practice **LinkedIn Groups**. These mostly process practices are guidelines for focusing more on “what you should be doing” rather than “how you should be doing it” with little to no regard for the environmental factors.

In a recent Cutter Consortium article entitled “**IT's Change Imperative: No IT Professional Left Behind,**” I reference game-changing technologies and their impact on traditional IT careers, positions and skill sets. This wake-up call is best described by a quote from four-star US General (Ret.) Eric Shineski: “**If you don't like change, you'll like irrelevance even less.**” This statement compelled me to alert service leaders of what they needed to do to take action. They need to prepare and train their service representatives on the state-of-the-art technology today. They also need to begin automating and integrating best practice process into the workflow of technology solutions like GoToManage.

**Purposeful Practices** are an innovative way to look at these widely accepted processes with an emphasis on achieving a desired, measurable end result. **Purposeful Practices** are always open to investigation and continuous improvement to increase the value of these services to the business.

## The Purposeful Practices are:

### Practice: 1. Achieving First Contact Resolution



#### DEFINITION:

- **First Contact Resolution** is achieved when the service representative taking the initial report (as delivered through phone, email, chat or self-service request) is the same person who resolves the issue to the customer's satisfaction.
- **First Call Resolution** is when the customer's issue is resolved on the initial phone call.
- **First Level Resolution** is when the customer's issue requires additional research and is resolved without leaving the first line of support, usually within a defined time period. Managers must encourage escalation if it speeds the issue to resolution.

#### PURPOSE:

First Contact Resolution is the most efficient and effective way to resolve customers' issues when they cannot do so themselves. It's about deploying all available resources (work-arounds, solutions, tools, documentation, prior recording incidents / resolutions, collaboration with team members and SMEs) to facilitate a speedy resolution on first contact. FCR leads to a better customer experience and a quicker return to productivity (business impact), improves the image of the Support Center, lowers the total cost of delivering end-to-end services and enables the other Tier-2 and Tier-3 teams to focus on delivering quality and timely IT projects to the business.

#### TOOLS:

- Skill-Based Routing
- Incident Tracking (Service Desk, IT SM, CRM, etc.)
- Knowledge and Documentation Management
- Remote Take-Over (Control)
- Access (Password Resets)
- IM and Customer Satisfaction Survey

#### PROCESSES:

- Incident Management, Request Management and Service Level Management
- Shift-left repetitive and reoccurring issue types, frequently ask "how to" questions and route service requests to the self-service portal
- Detailed call analysis to find out:
  - Who is the caller (name, position, tenure, etc.)?
  - What store, market, region or internal department are they calling from?
  - Why are they calling / What do they need or want?
  - Do we have what we need (knowledge, access, tools, procedures, etc.) to provide a timely resolution to this issue?
  - What type of action / work effort / timing is required (work-around / resolution / service) to resolve?
  - Who is best suited (skills, knowledge, experience, access, etc.) to speed to resolve through skill-based routing or assignment accuracy?

#### PEOPLE:

- Engaged, Customer Caring, Trained / Certified, Technical, Resourceful, Knowledgeable

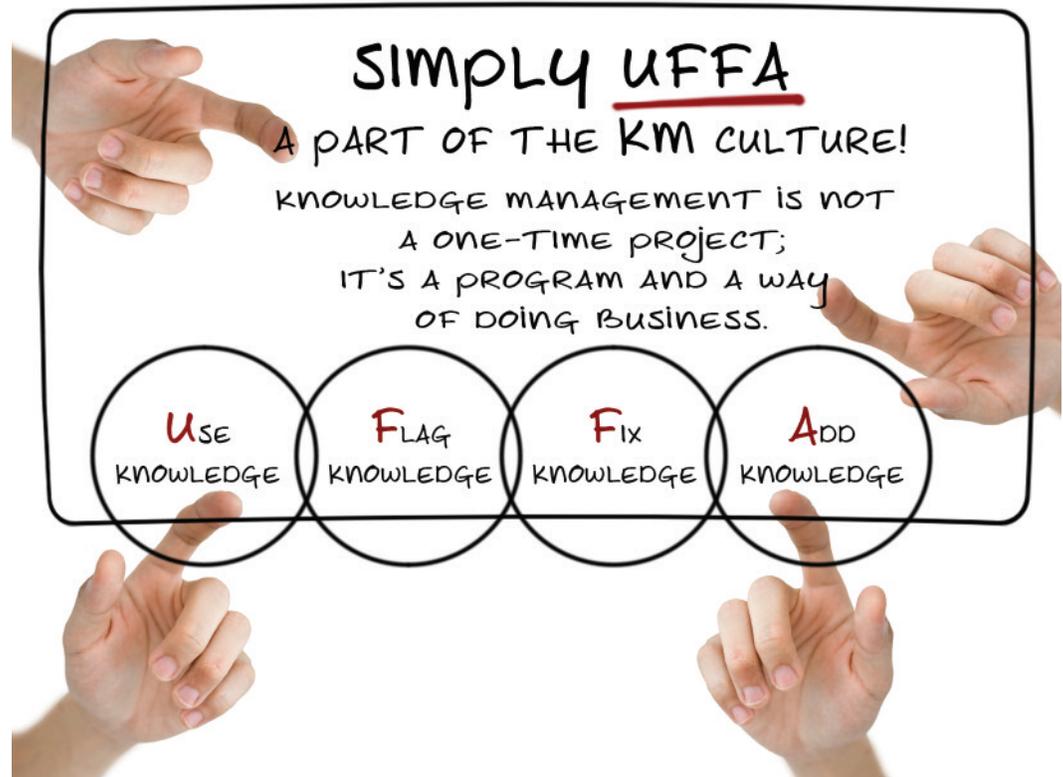
#### MEASUREMENTS:

- First Call / Contact Resolution (FCR)
- Knowledge Base Utilization (KBU)
- Customer Satisfaction Index (CSI)
- Mean Time to Resolution (MTTR)
- Total Call Volume (reduced status calls)
- Operational Level Agreement (OLA) Response Time
- Project Delivery Time

## Practice: 2. Making UFFA a Priority

### DEFINITION:

**UFFA is a Knowledge-Centered Support (KCS) practice for Using (U), Flagging (F), Fixing (F) and Adding (A) knowledge within the Incident Management process.**



- It's a simple way to remind the many people involved in resolving issues and fulfilling requests that they all play an active role in knowledge management by keeping the knowledge current and useful. To deliver knowledge at the speed of conversation (FCR), knowledge needs to be easily searched and retrieved, relevant, useful and accurate.

### TOOLS:

- The Incident Tracking (Service Desk, IT SM, CRM, etc.) and the Knowledge and Documentation Management tools integrated with the Incident and Knowledge Management (UFFA) Process.

### PROCESSES:

- **Incident Management and UFFA** — The knowledge must be provided to the support analyst during the Incident Management Process and (U)sed to facilitate a First Contact Resolution (FCR). The process, integrated into the tool, must make it easy to (F)lag knowledge for (F)ixing. It must also know to (A)dd new information when the absence of knowledge is forcing escalation to Tier-2 SMEs, delaying the issue resolution.

- Knowledge articles successfully utilized at Tier-1 (FCR) are prime candidates for deflection to the self-service portal.

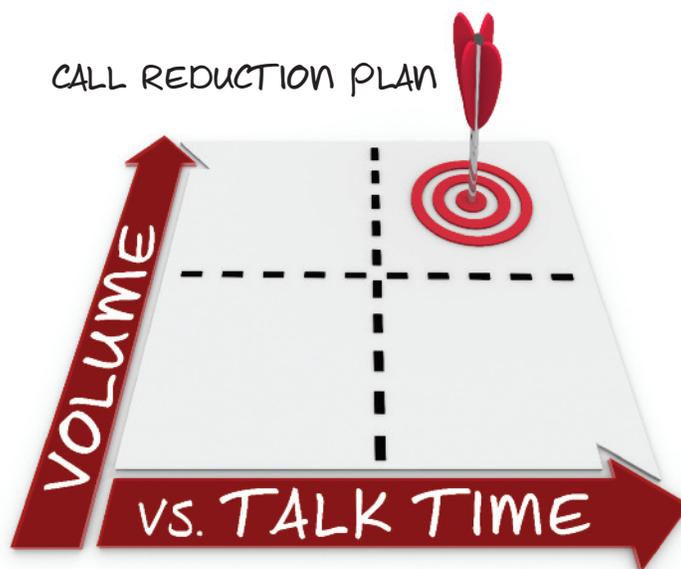
PEOPLE:

- **Knowledge Manager** — Architects the KM process and ensure its successful implementation and continuous improvement.
- **Subject Matter Experts** — Contribute frequently to the creation and maintenance of the knowledge as it relates to their domain and subject area of expertise.
- **Front-Line Analysts** — Search and use knowledge to resolve issues on First Contact, flag knowledge articles (KAs) that need fixing and note issues that need KAs created.
- **The Collaborators** — Work together to share knowledge in real time and thus are the ones best positioned to capture knowledge as it is created.

MEASUREMENTS:

- **KA Quality** = Knowledge Base Utilization (KBU) and Effectiveness (First Contact Resolution, Resolved at the self-service portal [L0])
- Number of knowledge articles created
- Average age of knowledge articles created
- Staff and customer confidence in finding the right information.
- Percent of staff searching, using, flagging, fixing and adding knowledge plus the number of steps and time required to access the right document.

## Practice: 3. Mapping Call Types for Action



PURPOSE:

Knowing the details about the caller, the reason for the call and the call characteristics (volume, talk-time, technical complexity, operational how-to, repetitive, etc.) provides information that is combined with analysis to create an Action Plan for deflecting, directing, training or introducing diagnostic tools, process improvement, knowledge or access.

Bring visibility to issues / perform analysis / determine business impact and make recommendations for releasing a long-term solution aimed at eliminating the root cause of a recurring problem.

## TOOLS:

- Incident Tracking (Service Desk, IT SM, CRM, etc.) with a relevant, simple and meaningful categorization schema
- Data extraction, manipulation and analysis tools
- Accurate and complete incident record logging
- Accurate categorization / prioritization for easy reporting
- Flagged escalated incidents that have no workaround / knowledge
- Analyses of the high priority (business impact) incidents, the most frequently escalated issues and the longest Mean Time to Resolve (MTTR) as RCA / Problem Management targets.
- Business Intelligence Tools for large amounts of fields, data and correlations

## PROCESS:

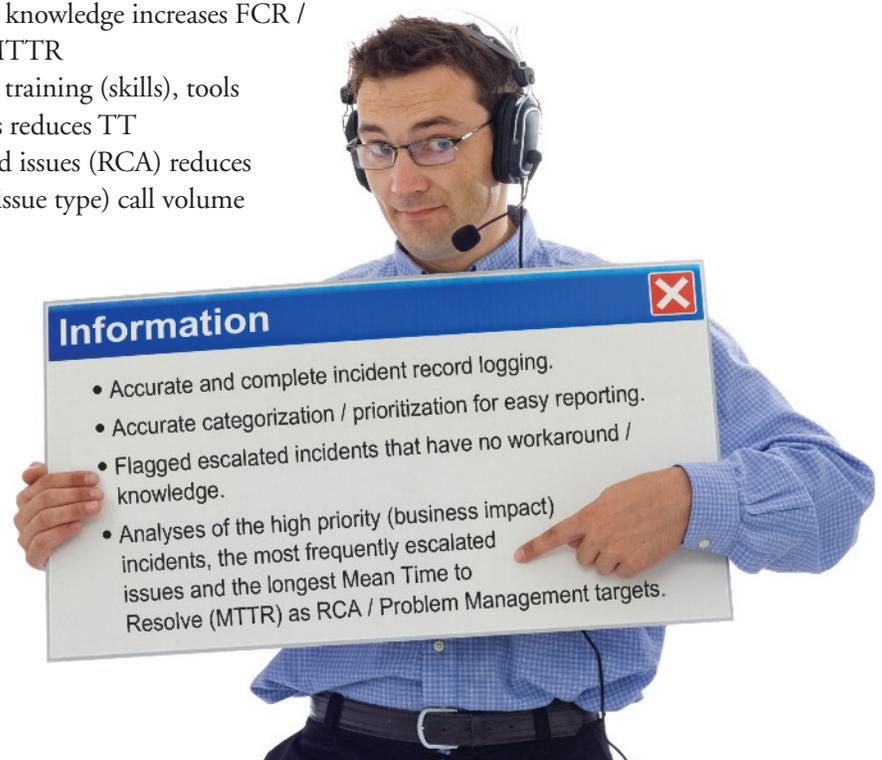
- Incident Management process involved with classifying and categorizing
- Quality Ticket Documentation
- Quality Assurance / Performance Coaching

## PEOPLE:

- Analytical, data-driven, tool experts, curious, resourceful

## MEASUREMENT (BASELINE, TARGET AND ACTUAL):

- Track high and low volume calls by type / issue.
- Track high and low Talk Time (TT) calls by type / issue.
- Separate Service Requests (SR) from incidents, technical from non-technical (operational how-to) and reoccurring from new.
- Direct results with the Action Plan:
  - Email / phone channel deflection routes to self-service
  - Published knowledge increases FCR / reduces MTTR
  - Improved training (skills), tools and access reduces TT
  - Eliminated issues (RCA) reduces targeted (issue type) call volume



## Practice: 4. Introducing New Technologies

### PURPOSE:

The principle of putting the customer first starts with the design of the Support Center strategy and structure and delivers on every moment of the customer interaction. It defines how all services are delivered against customer expectations with integrated and coordinated people, processes and tools. Putting the customer first is a corporate strategy where the executive team champions the customer and leads by example on a daily basis.

## STATING YOUR CUSTOMER-FOCUSED COMMITMENTS

IT IS OUR COMMITMENT TO TREAT THE CUSTOMER WITH CARE, AS WE WOULD WANT TO BE TREATED AS PEOPLE, WHO LIKE OURSELVES, ARE ALL COMMITTED TO THE SUCCESS AND SUPPORT ORGANIZATION.

IT IS OUR COMMITMENT TO THE CUSTOMER TO COMMUNICATE THE LEVEL OF SERVICE, CURRENT STATUS AND EXPECTED RESOLUTION TIME FOR YOUR ISSUE OR REQUEST.

IT IS OUR COMMITMENT TO THE CUSTOMER TO DELIVER A LEVEL OF SERVICE, BOTH IN RESPONSIVENESS AND RESOLUTION PRIORITIZED BY SEVERITY AND IMPACT OF THE ISSUE OR REQUEST.

IT IS OUR COMMITMENT TO THE CUSTOMER THAT YOU WILL BE THE FINAL AUTHORITY REGARDING YOUR SATISFACTION WITH THE FINAL RESOLUTION.

PROGRAMS:

- **The Face of the IT / Business** — The Single Point of Contact and Communication (SPOC2) positions the Support Center to represent the business to the customer or the IT organization to the business. Its success depends on the scope and entitlement of support.
- **The Voice of the Customer** — The customers put their trust in the Support Center to listen and collectively represent their feedback and issues (Voice) to senior management for understanding, analysis and action.
- **Resolution Ownership** — The purposeful practice of owning all customer issues and requests and the customer validation of a satisfactory resolution is the core of delivering impressive customer service. Support Center representatives must always set customer expectations, provide timely status updates, assign priority based on urgency / impact and deliver a timely resolution that is validated by the customer before the issue / request is closed.

MEASUREMENTS:

- A robust **Quality Assurance (QA) program** that:
  - Influences the support representative's performance scorecard
  - Depends on call monitoring
  - Compares an Incident or Service Request record review against Quality Ticket Documentations standards
  - Incorporates a transactional Customer Satisfaction survey





## Practice: 5. Balanced Scorecard Storytelling — Effective Use of Dashboards, Scorecards and Metrics

Reporting (dashboards, scorecards and metrics) simply tracks performance as a basis for continuous improvement and communicates this value to the IT stakeholders.

### TOOLS:

**Dashboards** — These provide real-time feedback on key operational indicators for the purpose of enabling rapid response and action to changing conditions within the Service Level Agreement (SLA) reporting. Dashboards are graphical in nature and provide at-a-glance access to key indicators (e.g., Average Speed to Answer [ASA], Aging Incident Records [IR], Customer Satisfaction Index [CSI], Resolution Time by Priority, First Contact Resolution [FCR]).

**Scorecards** — These tend to have a longer-term perspective (e.g., weekly or monthly) and measure higher-level or multiple measurements collectively. Typically represented in trending charts and data tables, scorecards could benefit from graphical representation (e.g., Volume of Contacts by Channel, Top 5 Issues and Callers, ASA, FCR, CSI, KBU).



The Support Center Balanced Scorecard

**Metrics** — These are not always relevant to all stakeholders, nor are they equal in their importance or priority in communicating the performance of the Support Center. Make metrics meaningful to the stakeholder audience by focusing on what’s important and to them. Pay careful attention to the balance and accountability of these metrics as it pertains to using them as a:

1. **Measurement Tool** — Allows the Support Center to view its balanced performance (e.g., Daily Dashboard - Operational Reporting).
2. **Behavior Modifier** — Aligns Support Center representatives’ performance metrics with the organization’s goals and objectives in a manner that motivates employees and influences desired behaviors.
3. **Accountability for Results** — Holds managers accountable for overall team results and forces them to direct value back to the business (e.g., Executive Stakeholder Summary).
4. **Performance Orientation** — Shows what the trending performance of the Support Center “has been” and “where it is headed to”— and where to focus management attention. Shifts focus from reactive to proactive management with analysis and recommendations.
5. **Story** — Tells the data in the form of a newspaper style like a Support Center gazette.

## The Art of What’s Possible: 4 Lessons

The GoToAssist Capabilities Matrix explores how to achieve the “art of what’s possible” by focusing on the benefits measured, enabled and delivered by GoToAssist. During the deployment of your solution, you will be served well if you consider these four lessons:

1. Target the biggest pain point and area of opportunity for continuous improvement that the customer will notice immediately.
2. Challenge the technical and process tool champions to hunt for additional creativity and innovative ways to optimize daily usage of the solution.
3. Track usage and relate it to performance improvement.
4. Promote, advertise and recognize each team member’s mastery (certification tests) and creativity (idea of the month) for using the tool to resolve more issues — quicker!

Table 1: GoToAssist Capabilities Matrix

| CAPABILITY                                                                                                                                                                                                         | APPLICATION                                                                                                                                                                                                                                                                                                                                                                                                                                            | IMPACTING MEASURE                                                                                                                                                                                                                                                                                     | BENEFIT                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rapid implementation with fast, easy and secure screen sharing, remote control, diagnostics, collaboration, file transfer, reboot / reconnect and chat capabilities all enabled in one tightly integrated solution | <ul style="list-style-type: none"> <li>Provides the Service Center with these technical capabilities built into a single, integrated solution</li> <li>Easily accessible and launched from the ITSM / CRM tool</li> <li>Empowers and enables the frontline representatives to resolve more complex technical issues / inquiries on first contact in less time</li> <li>Rewarding to the representative</li> <li>Satisfying to the customer.</li> </ul> | <ul style="list-style-type: none"> <li>Mean Time to Resolve</li> <li>Reduced Handle Time / Service Representative Productivity / Utilization</li> <li>Customer and Employee Satisfaction Index</li> <li>Employee Retention</li> <li>Mean Time to Resolve</li> <li>First Contact Resolution</li> </ul> | <ul style="list-style-type: none"> <li>Increased first contact resolution rates</li> <li>Reduced overall incident-handling times for more complex cases</li> <li>Lower total call volumes due to fewer repeat calls</li> <li>Reduced support costs by reducing onsite field service dispatch</li> <li>Increased customer and employee satisfaction, fulfillment and tenure</li> </ul> |
| Provides customers easy access to multiple channels                                                                                                                                                                | <ul style="list-style-type: none"> <li>Offers customers multiple contact / access options (e.g., phone, self-service portal or chat).</li> <li>Customers select the contact method that works best for them based on preference, complexity, urgency or limitations of available options.</li> </ul>                                                                                                                                                   | <ul style="list-style-type: none"> <li>Average Speed to Answer / Respond, Wait in Queues</li> <li>Customer Satisfaction Index</li> <li>Mean Time to Resolve</li> <li>Reduced Handle Time / Service Representative Productivity / Utilization</li> </ul>                                               | <ul style="list-style-type: none"> <li>Enhanced customer experience and improved customer satisfaction</li> <li>Reduced call and email volume which delayed the speed of resolution based on work effort and multiple contacts</li> <li>Improved ease and speed of connecting, diagnosing and resolving customer issues</li> </ul>                                                    |
| Customer issue / inquiry quickly and automatically assigns to a specific skills queue or broadcasts to all available service representatives.                                                                      | Depending on the skill-based routing structure of service representatives, the customer routes to the right representative who is skilled, tooled and ready to resolve the issue / inquiry                                                                                                                                                                                                                                                             | <ul style="list-style-type: none"> <li>First Contact Resolution</li> <li>Average Speed to Answer / Respond, Wait in Queues</li> <li>Customer Satisfaction Index</li> <li>Mean Time to Resolve</li> <li>Reduced Handle Time / Service Representative Productivity / Utilization</li> </ul>             | <ul style="list-style-type: none"> <li>Expanded staffing options for remote representatives, part-time workers or pay per issue / inquiry contractors.</li> <li>Setting up the representative for success and enhanced customer experience.</li> <li>Improved efficiency, effectiveness and utilization of limited resources</li> </ul>                                               |
| Easy management access to: <ul style="list-style-type: none"> <li>Reporting Dashboard</li> <li>Customer and Agent Surveys</li> <li>Silent Monitoring and Session Recording / Archiving.</li> </ul>                 | Allows managers to confidently know how their virtual team is performing against performance targets, customer expectations and defined processes.                                                                                                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>Quality Assurance Scores</li> <li>Representative Performance Scorecards ( 3-5 metrics)</li> <li>Customer and Employee Satisfaction Index</li> </ul>                                                                                                            | <ul style="list-style-type: none"> <li>Improved insight into the quality of service being delivered</li> <li>Established access to live sessions and recorded sessions, which provide assistance, coaching or training for the team's performance to improve the customer experience.</li> </ul>                                                                                      |

Table 1: GoToAssist Capabilities Matrix (continued)

| CAPABILITY                                                                                                               | APPLICATION                                                                                                                                                                                                                                                                                                                                                                                                                                                | IMPACTING MEASURE                                                                                                                                                                                                                                                    | BENEFIT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Collaboration between the team and the various technical and business teams that make up the tiered support model</p> | <ul style="list-style-type: none"> <li>Seamlessly and effectively transfers a challenging remote session to a Subject Matter Expert for quicker resolution</li> <li>Enables and encourages support teams to provide "warm transfer" assistance in the form of both invisible / visible collaboration</li> </ul>                                                                                                                                            | <ul style="list-style-type: none"> <li>Customer Satisfaction Index</li> <li>Mean Time to Respond and Resolve</li> <li>First Contact Resolution</li> </ul>                                                                                                            | <ul style="list-style-type: none"> <li>Minimized number of contacts with more initial contact resolutions</li> <li>Enabled service representatives who improve skills, knowledge and diagnostic ability while actively engaged in working through to the resolution with Subject Matter Experts</li> </ul>                                                                                                                                                                                                                                                  |
| <p>Multiple ways to easily integrate current tools and practices</p>                                                     | <ul style="list-style-type: none"> <li>Integrates the current service and support tools, enabling a centralized repository for documenting the official record of the customer interaction</li> <li>Allows seamless transition from self-service to assisted service for the customer</li> <li>The service representatives utilize and manage all of their tools from a single interface / "cockpit" of integrated tools during the resolution.</li> </ul> | <ul style="list-style-type: none"> <li>Customer and Employee Satisfaction Index</li> <li>Average Speed to Answer / Respond, Wait in Queues</li> <li>Mean Time to Resolve</li> <li>Reduced Handle Time / Service Representative Productivity / Utilization</li> </ul> | <ul style="list-style-type: none"> <li>For customers: greater freedom to help themselves plus seamless and complete issue transfer to service representatives if necessary</li> <li>For service leaders and representatives: integrated tools all in one place providing a consistent interface for resolving issues / handling inquiries in the most efficient manner</li> <li>For organizations: one documented record of all the resolution effort as well as all customer communications involving status updates, information or validation</li> </ul> |

## **Bang for the Buck: Generating a Continuous Return**

“The definition of insanity is doing the same thing over and over again and expecting different results.”

*Albert Einstein*

As a former product and client success manager, I know how important it is to ensure that Support Centers are successful in their deployment and use of support technologies. In my experience and travels, I've developed five focus areas for extracting value from technology toolsets. The end goal should match the reason for the purchase (1) to utilize the tool to its fullest capabilities and (2) to maximize the return on your tool investment. Refer to *Table 1*.

### **Five Focus Areas for Generating a Continuous Return:**

- 1. Get comfortable with using the tool**
- 2. Don't be afraid to explore, innovate and try new applications with the tool**
- 3. Be curious; learn how other organizations are using the tool**
- 4. Provide various in-depth levels of training on the tool to the Support Center representatives**
- 5. Appoint a technical and process tool champion to learn the tool's best applications**

### **Don't Be a Checklist Manager**

Lastly, here are additional thoughts on focus, patience and success one step at a time. I was challenged by a mentor on my long project list. He loudly stated that “there was no way I could accomplish all of this in one year.” His concern was me not having enough time, focus and resources to do these projects right the first time. He taught me not to be a “checklist manager” focused on just getting things done. His mentoring lesson was not to check off the project as done but to derive the maximum benefits from any project, especially ones involving technology where a Return on Investment is expected by senior executives.

Take away these lessons and focus on (1) providing quality not quantity, (2) doing it right the first time and (3) maximizing the capabilities of any solution by continuing to generate a return on your investment in the tool, process and people.

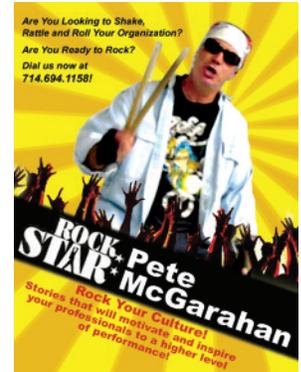


### About Peter McGarahan

Peter J. McGarahan is the founder and president of McGarahan & Associates, the strategic service value advisor to global service organizations. Peter offers 28 years of IT, Business and Customer Service leadership in aligning and optimizing enterprise service and support organizations to deliver value against business objectives. As a trusted counsel to senior IT and customer service leadership, Peter has influenced the maturity, image and impact of the service and support industry. His passion and thought leadership led the Taco Bell support organization to achieve the Help Desk Institute Team Excellence Award in 1995. IT Support News named him one of the “Top 25 Professionals in the Service and Support Industry” in 1999. Support professionals voted McGarahan “The Legend of the Year” in 2002 and again in 2004 at the Help Desk Professionals conference for his endless energy, mentoring and leadership coaching. As a practitioner,



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