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Building a Better IT Service Channel

What ITSM experts say about improving IT engagement, resolution and satisfaction

How do you build a better service channel for your company? As IT has evolved, support teams face the task of providing better service while reducing budgets and headcount at the same time. Yet self-service options, while acceptable for triaging incoming contacts, have not been generally well-received. This white paper from Netop—a global leader in IT software for over 30 years—examines the tools that IT management should consider when taking their service channel to the next level, and reviews the steps to making your ideal service channel a reality.

What's your Service Channel?

In a word, it's indispensable. The concept of the service channel is the crux of IT service management (ITSM) today: think of it as the hinge on which ITSM turns.

Your service channel used to be your phone, simply enough. As recently as a decade ago, almost all incoming help requests reached support teams via phone. Gradually though, traffic got scraped away from the telephone via email, on-site form submissions and online chat.

As companies migrated their support resources to online platforms, self-service became a phenomenon and a priority; still, the need for an effective, efficient way to manage these channels remains.

Meanwhile, a significant shift is taking place. Rising numbers of IT leaders are looking at the people who consume their services not as "End Users," but "Internal Customers." In fact, in a February 2013 survey, 47% of IT personnel said they considered the individuals to whom they provide support to be their "Internal Customers." Only 11% would call them "End Users" (Mann, 2013).

Just semantics? On the surface, perhaps—but the change in language indicates a deeper shift in how Support views the Supported; it also changes the metrics of success. With "End Users," success used to depend on the rate of first-call resolution. However, when supporting "Internal Customers," the key metric becomes customer satisfaction.

Of course, speed of resolution will always be an important component to this, but within this broader view, other factors come into play. For example, satisfaction depends too on a customer's ability to communicate and access support within their desired channel.

So the challenge that faces IT managers is this: how to evaluate the success of your service channels? Do your customers have accessible access points to service? Are they able to self-escalate, smoothly moving from self-service to a help ticket with the promptness they need? Do they get the resolution they expect, in the time they expect it? Most importantly, do they believe that their request is your priority?

In this paper, Netop tackles those questions, drawing conclusions from current research, recent advice from IT and customer service leaders and our own 30 years' experience in providing IT solutions (including remote support and online communication) in the world's most demanding technical service environments.

You can find more information on building your service channel at www.netop.com. We encourage your feedback. Please let us know what you think by dropping us a note at serviceteam@netop.com, or chat with us by clicking here.

Your organization may include several different service channels, depending on how your team is structured—from phone to chat, from formal requests to casual conversations. Regardless, the keys to a successful evaluation are these:

1. Evaluate your channels independently from one another

Why this matters: Different channels vary in cost, utilization and results. Of course, combining channels makes sense when evaluating the success of your IT team as a whole; however, don't neglect to look at each discretely. For example, after setting an overall first-call resolution target, find out which channel (email? chat? phone?) provides the best rate.

2. Make "customer satisfaction" your metric

Why this matters: The days of "End Users" are fading. Today, IT leaders recognize the importance of customer satisfaction above all other metrics. Make sure to include customer feedback mechanisms (surveys and forms) that let your internal customers offer instant feedback on your team's performance. Most sophisticated chat tools have surveys and forms built in; also, on-line survey platforms are readily available.

3. Realign company resources with customer needs

Why this matters: Evaluating metrics is a great exercise, but if you're not willing to make adjustments it's also a fruitless one. As you look at your channels, dig into the rate of utilization, the speed of resolution and the degree of customer satisfaction for each. If customers are consistently turning to your self-service channel, but are consistently dissatisfied with the results, change something. Pump more documents into your self-service channel, or make a different channel more accessible.

The Changing Demands on Technical Support

Over the past twenty years, technical support teams have been among the slowest to change within their companies.

Product development groups have led the creation of new technologies, marketing teams have adopted new metrics, sales squads have adjusted to new platforms—yet in most large organizations, the tech support team has been very conservative: responding to what's in place, focusing on which platforms their users are working with, relying on the tools at their fingertips.

It seems that while companies look to product development, product research and marketing for innovation, they presume IT to be merely reactive.

> "The IT profession is really still in its infancy. It's only a few decades old – a new kid on the block, compared to its peers in other business areas that have had centuries to 'grow up.' "

- Leading IT Transformation

Earlier, we mentioned that first-call resolution has long been the predominant measure of help desk performance. Yet taken in isolation, the resolution metric—that ideal melding of accuracy and speed—is not enough. There's a deeper metric to pay attention to: customer satisfaction, and to measure it requires new mechanisms such as forms and surveys, readily available, frequently deployed, regularly reviewed.

This approach flies in the face of a previous trend, when management viewed the IT department as merely reactive and expensive. A company's IT efforts used to focus solely on managing the cost of IT: migrating support overseas, introducing multi-layer self-service platforms, driving users to self-service, reducing head count. The bottom line was about reducing cost, not maximizing service.

We are emerging from that model. The *IT Manager's Handbook* puts it well: "While reports from your ACD and call-tracking software can give you all kinds of statistics, they often don't tell you if your customers are satisfied" (Holtsnider, 2010).

In fact, this fresh focus on service and satisfaction comes hand-in-hand with the realization that technical support can be a profit center, not solely a cost center. IT support is evolving. As with all evolutions, it's a matter of many steps.

In *Leading IT Transformation*, Dan Roberts said, "The IT profession is really still in its infancy. It's only a few decades old—a new kid on the block, compared to its peers in other business areas that have had centuries to 'grow up' " (2012).

In short, there's a new goal on the table: to move your organization from its IT infancy, where tech support is seen as necessary but expensive, to where it's recognized as a sophisticated mechanism that builds value among end users and contributes to your overall culture. Of course, transformation as large as this takes time, resources and perhaps most of all, perseverance.

What your colleagues say

At the Pink Elephant conference in February 2013, Netop asked CIOs, CISOs, IT leaders and technologists across the spectrum to identify their biggest challenges in improving technical service. Here's what they said:

Preparing for BYOD: "We've had a decentralized workforce for some time—but we've had limits on the platforms that we support. We've been asked to provide equal support to all employees across all platforms. Right now, that's not a huge challenge because we have a fairly limited range of devices and platforms... but it doesn't take much imagination to realize that once we announce we're supporting any OS, that's going to change."

Charging and accounting: "This is more of an internal than an external challenge. Our team has to do a better job of understanding and following through on our standards for departmental chargebacks for service. Sometimes, our staff thinks it's not a high priority to track time spent on internal requests. We need to either help them get a better understanding of why we need to track this time, and how it impacts our department's bottom line, or have a better system to track this."

Juggling piecemeal and legacy solutions: "We use [a remote access solution]. Before that we used [a different remote access solution]. We have two or three others that we use too, depending on the OS. I don't know that anybody who's now in the department was involved in the selection, but I know we have many tools that we use, and I'm not sure that anybody has evaluated them for security."

Managing mobile: "Our team is more mobile, our users are more mobile. Our support tools are not."

Integrating with other systems: "I need tools that integrate with the systems that we use. There are some great tools out there, but if I can't get data from them into our desk management system, change management, asset management, telephony, ticketing, and reports—you get the point—then it's not reducing our workload. Best of breed is great as long as it integrates."

Evolving your service channel

There are many ways to transform your IT service channel to one which proactively considers both the needs of your organization and the desires of your end users. In the section below, “Implementing a Better Service Channel,” we discuss how to make that happen. First though, let’s look at the individual components of your service needs, and the areas for evaluation where you can address them.

IT Service Management Solutions

ITSM solutions (which receive, queue and track support requests) are the cornerstone technologies in today’s service desk environments. They provide frameworks for analyzing trends and implementing processes; they also provide the basic tools which service desks require to function.

That said, even extensive ITSMs can lack the components needed to improve efficiencies and elevate the customer satisfaction you can achieve from the support you provide. Their performance may vary from channel to channel; they can also differ based on incident type, platforms supported and other end-user variables. True, ITSM technologies are gradually implementing the tools and standards developed today in the field of customer relationship management (CRM)—still, features vary.

With all these factors in mind, our team at Netop has distilled the stages of service down to three fundamental areas for you to evaluate when improving your service channels:

1. **Engagement:** How successful are your internal customers in accessing the resources they need?

2. **Resolution:** How rapidly are your incoming requests resolved or elevated?

3. **Satisfaction:** How effectively can you measure customer satisfaction?

IT support is a balancing act. It depends on a dedicated staff, ongoing training, adaptive processes and industry-leading tools. However, when in sync, these components can effectively charge through even the most intimidating issue logs.

Improving Engagement

According to a recently published report, there are eight fundamental building blocks to customer engagement frameworks (Gartner, 2013):

- **Self-service knowledgebase**: online self-service supported by a knowledge management engine and database
- **Email response management**: email management with natural language, optical character recognition (OCR), routing, automated email escalation and categorization
- **Online chat**: video, audio and text-based interaction with a member of your support team; online chat sessions are routed similarly to voice calls
- **Co-browsing**: collaborative browsing of a website, shared between agent and customer
- **Virtual assistant**: interaction with a virtual entity via a web-based or mobile device interface
- **Video services**: outbound video communication from an agent to a customer; how-to videos stored either in the knowledgebase or a social media channel
- **SMS**: service updates and requests via mobile device or smartphone using data and an SMS channel
- **Social media**: flowing data and requests seamlessly between popular social media channels and your help desk

> “Chat is a natural for companies that are serious about realizing the maximum from their web-based services.”

- Susan Hash, Pipeline Magazine

“Right Channeling” Your Customers

There was a time when every support incident led to someone picking up a telephone. Back then, there was a single preferred channel for service.

Today’s customer service culture has a higher bar to meet. Today, the customer’s complaints should be resolved within the same channel where the difficulty first took place. Rather than trying to steer them to one channel or another, current best practice is to make sure they can access the static resources and personnel they need, from whichever channel they prefer.

For IT, this means recognizing that your online users—who form the vast majority of all online tech support requests—need a complete suite of resolution resources at their fingertips. Asking them to leave the online channel (switching to email or telephone) for elevated technical support is counterintuitive; it’s also ineffective. As importantly, it is quickly becoming anathema for end users.

A report published by Netop in 2012 indicated that over 65% of end users across all age demographics preferred an online chat channel for customer and technical service. When you consider that your internal customers are sitting at their computers, this makes perfect sense. As your IT support desk looks for ways to make service more accessible, and as your end users continue to seek that service while at their machines, popular interest in embedded online chat continues to grow.

Obstacles to Customer Engagement:

- Being placed on hold, interacting with a call center menu or having to re-explain an issue when passed between support representatives
- Dealing with self-service tools that make sense in theory, but are difficult to navigate for those unfamiliar with specific terminology
- Encountering problems in accessing support staff in real-time through website and online channels

Why Online Chat?:

The beauty of online chat lies in its simplicity and versatility. End users with tech issues can access your IT team from their computer, on your website or intranet, or from email and social media. As soon as the request arrives, your help desk agents can immediately look up ISP and computer information, or use pre-deployed forms to better understand the customer’s environment. With the intuitive routing of incoming help requests, it’s easy for agents to manage multiple requests simultaneously, and to route requests to the most appropriate person within the team—or in another department.

Improving Resolution

It's crucial to give your staff the right array of tools to back up, monitor, manage, control and resolve issues at end user computers. Your tool set is instrumental in achieving higher first-call resolution rates; in addition, the growth of BYOD support, combined with the need to support extant legacy systems—often across a diverse array of platforms—presents extra challenges. How do you manage multiple systems while expediting service?

ITSM solutions providers like Netop have developed technologies which consolidate your support tools into a single platform, so your team can support a wide range of legacy platforms, attended and unattended devices, as well as BYOD initiatives, without shifting between consoles.

These solutions let your technicians:

- Connect to different types of devices across local and dispersed networks from a single interface,
- Leverage a feature-rich toolset (chat, scripting, rebooting, more) to perform diagnostics and resolve problems more efficiently,
- Integrate with core ITSM systems,
- Centralize security management, including Active Directory integration, to ensure that users are operating within business-defined access rights and permissions,
- Maintain complete audit trails (with video recording) of all remote sessions.

Having the right remote support tool is critical. In IT Manager's Handbook, Holtsnider and Jaffe write that:

Often an issue may go unresolved during the initial phone call because the user was unable to describe the problem accurately or couldn't follow directions provided by the Help Desk analyst. Using a remote control package, a Help Desk analyst can see exactly what the user sees on their PC and even take control of the user's PC, all without ever leaving the Help Desk chair. This remote control/access saves time, increases user satisfaction, and improves effectiveness of the Help Desk tremendously. (HOLTSNIDER, 2010)

Providing Secure Support

From PCI to HIPAA and beyond, the standards that IT service providers must comply with seem ever-growing. In fact, there are few industries not subject to mandated security standards. Often these standards extend to vendors providing service into compliance-governed clients, creating an additional layer of evaluation for your service channel: managing security and risk.

A fundamental component to this challenge is the ability to generate thorough reports and audit trails. According to the *IT Manager's Handbook*, "Perhaps the most critical item in your compliance regimen is to make sure that you're keeping evidence of your activities" (Holtsnider, 2010).

This need to record your access and activities extends, too, to any external vendors you use to support your IT environment, internal or external customers. As you evaluate your resolution tools, be certain to enable the necessary recording, reporting and auditing mechanisms.

Obstacles to Resolution:

- Needing to use several different remote access tools to address issues in different environments
- Not being able to connect to employee devices outside the company's LAN
- Not having a rich set of features and tools, once connected to another device
- Having to break security rules in order to help end users

> "Every second counts with the staff we have. Being able to resolve a problem quickly and move to the next call is critical."

- Debbie Thurston, Spartan Stores

Improving Satisfaction

After examining engagement and resolution, we turn to customer satisfaction. A 2012 review of customer engagement frameworks identified several additional mechanisms for evaluating and improving the performance of the service channel (Jacobs, 2013):

- **Multichannel analytics**: analytics tools to obtain comprehensive insight into the usage of, and customer interaction across, all channels deployed
- **Multichannel feedback management**: survey tools to obtain customer feedback across all channels post-interaction
- **Multichannel interaction recording**: recording of web searches, email chains, web chat transcripts, collaborative browse sessions and SMS interactions for quality purposes

To be of value, these metrics must be "relevant, practical, actionable, reported and owned." (DuMoulin, 2008). Without them, your ability to access and analyze data is greatly limited, which of course gets in the way of how closely you can understand your internal customers' experiences.

Of the three mechanisms listed above, feedback management is most significant. While data from your existing telephony and ITSM suites can offer a strong statistical profile of your help desk's performance, they often lack the more subjective considerations of customer satisfaction.

Gathering and Sharing Customer Satisfaction Metrics

One of the advantages of using your online chat channel for customer service is the opportunity to direct your internal customers to feedback surveys.

Service agents can push out survey forms to customers during the chat interaction, or redirect customers' browsers to online survey pages (Key Survey, Survey Monkey, etc.). Putting the customer in direct contact with an online feedback form makes it more likely they'll complete the survey than if they were to use an interactive voice response (IVR) mechanism: from 86% to 64% ("The best way to survey?" 2012).

But gathering feedback from customers is only one piece of the satisfaction puzzle. Sharing that information is equally important, though often overlooked. Think of this as "closing the loop" in your efforts to improve customer satisfaction. According to a recent Pink Elephant publication, there are four constituencies who need to be kept informed of the quality of your service performance (Pink Elephant, 2012):

- **Internal customers**: When you have results to brag about, let your internal customers know; if you receive significant negative feedback, acknowledge it
- **The service group itself**: The feedback from your customers should be a significant source of motivation for your service team.
- **Senior management**: Share the strides you're making in providing and measuring service: this can be helpful when implementing future projects
- **External service providers incorporated into the service chain**: Those outside suppliers supporting your service team need to know how their contributions are viewed within your organization

Obstacles to Satisfaction:

- Not being able to find easy-to-deploy tools for gathering customer feedback
- Strategizing how to measure activity levels and load on the service desk to optimize resources
- Establishing controls and standards to support SLA obligations

> "While reports from your ACD and call tracking software can give you all kinds of statistics, they often don't tell you if your customers are satisfied."
>
> - The IT Manager's Handbook

Implementing a Better Service Channel

After investigating and evaluating how to improve your service channel, it's time to put action to ideas.

Building a better service channel requires you to be its champion. Innovations, whether in products or services, never take shape overnight. Rather, the improvements you make will be a series of steps, often repeated, consistently considered. Here are some tips to keep in mind as you set out.

1) Position Your Team for Tomorrow

IT managers are in the difficult space of needing to provide service today while preparing for tomorrow. As your customers are encountering services, widgets, tools and apps on external sites, they'll grow more accustomed to using them. Looking for ways to stay up with them – or get ahead of them – can be equal parts disruptive and rewarding.

As Clayton Christensen wrote in The Innovators Dilemma:

> Products that do not appear to be useful to our customers today (that is, disruptive technologies) may squarely address their needs tomorrow. Recognizing this possibility, we cannot expect our customers to lead us toward innovation that they do not now need. Therefore, while keeping close to our customers is an important management paradigm for handling sustaining innovations, it may provide misleading data for handling disruptive ones (CHRISTENSEN, 2003).

2) Prepare Your Arguments

Resource allocation can prove as big a challenge as the implementation and adoption of a new technology:

> Managing innovation mirrors the resource allocation process: Innovation proposals that get the funding and manpower they require may succeed; those given lower priority, whether formally or de facto, will starve for lack of resources and have little chance of success. (CHRISTENSEN, 2003)

Simply put: innovation is usually a budget argument.

If you want a better service channel, you will have to argue for a better service channel. Your argument will be subject to the due diligence and biases, both rational and inexplicable, of your organization's management team.

The particulars of your organizational structure and processes will have a big impact on the decision. Winning the argument lies heavily in your ability to educate and persuade the individuals who will be voting up or down.

> "Managing innovation mirrors the resource allocation process."

- The Innovators Dilemma

Keys to marketing your proposal:

1. Understand the straightforward value of the change you propose, and be ready to communicate it.
2. Keep the introduction of the change finite.
3. Have your timeline mapped, and stick to it.
4. Evaluate on time, and with clear eyes.
5. Make your test-users your priority.

3) Market Your Project Proposal

According to Christensen, “disruptive technology should be framed as a marketing challenge, not a technological one” (2003). What does this mean for ITSM?

It means you’ll need to start by finding the allies within your organization, the early adopters of the channel innovations that you want to drive. Broad-scope technological innovations seldom occur. It would be unrealistic to expect that broad-scope service innovations would be any different.

Say you win over a few influential decision-makers on the need to create a better service channel: a good first step. Still, a preliminary win is no conclusion. It would be premature to presume organization-wide adoption so early. Rather, with funding in hand, the next step should be to identify the select few within your organization with whom you want to test, understand and adjust your new service processes.

In fact, this process is no different than bringing a new technology to market. It’s a basic marketing concept, but one that is not frequently brought into play by CIS teams launching new initiatives.

4) Know Your Limits

If you are not aware of what peers in your field are doing, take time to reach out. Go through organizations such as HDI and SITS, and get to understand the challenges your colleagues are facing. Your peer communication can help determine how your department aligns within your organization, and how it compares to other companies within your sphere.

Also, know your organization’s workflow limits. For example, within our company, Netop, we have a division that focuses on K-12 education technology products and services. We know that to approach this group with a new service initiative during certain times of year—owing to their product release schedule and their customers’ buying cycles—would certainly entertain neglect, and likely produce failure. Every organization has their own product and market realities that restrict the success of your ITSM initiatives. Do what you can to mitigate these realities.

5) Understand Your Failures

Let’s assume you’ve created a clear statement of the value of the change you propose, and achieved the necessary buy-in. You’ve restricted the launch of your initiative to the allies you’ve identified, and fostered their support. You’ve accounted for the fact that there are external realities which might impact your initiative. This is good—but what if you have a measured negative, or worse, no measured response?

Your understanding and tolerance of failure is a big factor when launching any disruptive process. Truth be told, whether it’s a consumer-facing application or an internal system, the likelihood of failure is strong.

Of course, the term “failure” is a bit misleading, both in strength and scope. When you can adjust and move beyond the missed benchmarks, you make “failure” more finite.

Failure in improving engagement:

- Was our channel accessible?
- Was our channel apparent?
- Was our traffic what we expected?
- What could be diverting traffic?
- Do we have unresolved conflicts between self-serve and IT assistance?

Failure in improving resolution:

- Do my agents have the ability to address issues in-channel?
- Do my agents have the ability to rapidly elevate the support request within the channel?
- Do my agents have to switch between solutions to provide service?
- Do our automated responses align with our end users' questions?
- Do we adequately support all of our end users' devices?

Failure in improving satisfaction:

- Do I have the ability to measure end user satisfaction at the end of each interaction?
- Do I have metrics that give me insight on each interaction; what do these show me?
- What was the resolution time and log of each interaction?
- Are my mechanisms for gathering satisfaction data being utilized?
- Are individual agents or communication campaigns underperforming?

Summary

Improving your service channel is no small goal, clearly. Yet it is achievable, and when achieved, the results speak for themselves.

With industry-leading tools, a unified support staff, the right training, consistent evaluation and the ability to adapt as you go, you can offer your internal customers a level of support that bucks the history of IT conservatism and rises to the trend of superior service.

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