

WHITE PAPER

## **2004 Trends and Directions in Web-based Support**

Done right, the business of delivering service and support can be both rewarding and lucrative, driving productivity, growing revenues, and in many cases, enhancing a business' very reputation. The problem? It can also be supremely challenging and frustrating, not only for support organizations trying to deliver a quality customer experience, but for those impacted most — the clients themselves.

For corporate help desks, the challenges are well-documented and growing exponentially. Charged with safeguarding the technology that drives their businesses, help desks must ensure productivity under a host of pressures: handling a high percentage of repetitive problems that eat up valuable resources; laboring under tight budgets that translate to fewer technology investments and smaller workforces; supporting an ever-increasing number of complex applications and systems; servicing increasingly mobile workforces requiring a range of portable productivity tools; and meeting stringent service-level requirements. For customer-facing service organizations, primary challenges include: delivering superior service to premiere, revenue-generating customers but somehow satisfying all customers; finding ways to cross-sell and upsell without deterring customers; creating a multichannel experience that integrates consistent knowledge content across channels; offloading support to less-expensive channels without degrading service; and accurately capturing customer data so it can be used to enrich subsequent service contacts and optimize marketing campaigns.

*“When you’re dealing in customer service, you’re trying to sell something and make sure the customer comes back. At the help desk, you’re trying to help them so they don’t come back.”*

**-Kris Brittan, Gartner**

Though their respective challenges differ slightly, the ultimate goal of internal and external service shops is the same: deliver the best service experience as cost-effectively as possible. That’s no small feat, as support organizations everywhere struggle to do more with less: according to a recent survey conducted by SupportIndustry.com, 44% of respondents saw their support budgets decrease over the past year, while 71% saw

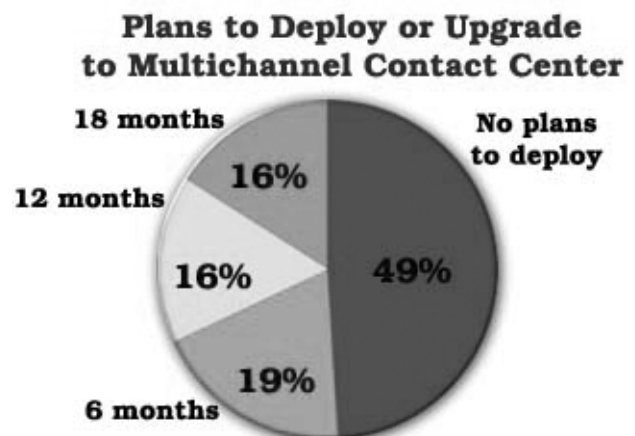
demand for their services increase. To deal with these inconsistencies, more and more organizations are looking to e-support and e-service technologies, which enable organizations to improve processes and support delivery while, in many cases, driving down costs. These offerings reduce the burden on overworked help desks and contact centers in a variety of ways: automating and streamlining the resolution of common problems, allowing businesses to push service and support to less-expensive and expedient channels, and enabling employees and customers to serve themselves. Among the categories of e-support and service tools and supporting platforms available:

- **Self-service:** Products in this area enable employees and customers to search for answers to their problems without contacting an agent. They include knowledgebases, FAQs, troubleshooting wizards and online documentation. Increasingly, self-service channels will become tightly integrated with access to live agents for what Gartner Inc. calls “secret customer service,” where an agent gets pulled into a self-service session to corroborate a knowledgebase suggestion, but without the customer knowing.

- **Automated help technologies:** These products include email autoresponse and autosuggest, which provide answers while enabling support centers to practice call avoidance.
- **Assisted-help technologies/support automation:** Typically used by a live agent to deliver support asynchronously or collaboratively — whether a session is generated by a phone call or after escalation from self-service — these technologies include email, user forums, chat, VoIP, phone-back, screen-sharing, white-boarding, and remote control and diagnostics.
- **Self-healing/support automation:** These technologies enable desktops and servers to diagnose and repair their own simple problems, such as issues with their registries. By identifying problems with one computer or system, companies can automate the delivery of patches to other systems likely to be affected.
- **Collaborative platforms:** These technologies help companies define the proper group of individuals — whether from corporate departments or external organizations — to handle specific support situations and bring them together in collaborative teams to solve problems.
- **Help desk/customer service call management platforms:** Though their systems were originally designed for call management for telephony platforms, help desk and contact center call management providers have added integration with multichannel support offerings over the years, creating sophisticated, integrated troubleshoot ticketing, workflows and consistent knowledgebase access. Increasingly, they're adding e-service components such as email management to their contact management suites, either through in-house development or acquisition.

It's no surprise that such tools have been growing in number and popularity over the last few years, as it's imperative that organizations find more cost-effective ways to deliver service and support. In fact, says Esteban Kolsky, an analyst with Gartner Inc., following a period of slowed IT spending due to a stagnant economy, spending in the e-service and support markets is starting to pick up again. According to Forrester Research, the worldwide market for e-service products is expected to grow to \$2.2 billion by 2005. Meanwhile, IDC predicts that e-support and remote diagnostics tools will experience the highest growth rates of any tool segment in the software support market, which overall will reach \$34.3 billion by 2007.

However, while such offerings have delivered significant benefits over the last few years, a number of factors — both technological and cultural — have thwarted their true potential, according to experts. In many cases, for example, organizations make the mistake of deploying technology without reviewing their underlying business processes and therefore don't get the ROI they might otherwise enjoy. Classic examples can be seen in many operational CRM implementations, in which marketing,



source: Aberdeen Group, 2003

sales and service applications have been used to automate outdated or ineffective processes. Too, many companies have paid lip-service to the need to develop strategies that ostensibly place clients front and center, but don't spend the time reengineering processes or investing in the technologies that will allow them to do so. Other problems stem from technology shortcomings, where such issues as a lack of integration among key product types and channels, inconsistent knowledge content, and difficult-to-use interfaces hinder client-focused strategies.

The good news, say analysts, is that the talk that's been circulating for years — promises of true, integrated multichannel service across consistent content, support automation, and closed-loop processes tying operational and analytical CRM data — is finally becoming reality. First and foremost, say analysts, service and support organizations are finally starting to "get it" and are deploying technology that automates logical business processes. Two, technologies are maturing and, in many cases, converging in larger, integrated application suites and hubs that enable multichannel service and support delivery.

### **At Your E-Service**

"Organizations are beginning to think and buy strategically rather than tactically," says Gartner's Kolsky. "The industry has talked for so long about how to manage channels and customers in an integrated way but businesses weren't really doing it. But they've started to understand that they can actually save money and drive satisfaction by consolidating all these channels in a centralized way."

Businesses are becoming increasingly interested in what Kolsky calls the true "customer interaction hub," which consolidates call tracking, multichannel service delivery and knowledge content into a centralized solution. It's the next phase of an evolution that's already seen the convergence of e-service point products into larger suites, he says. "The CIH brings together channel management, knowledgebases, business rules and analytical engines in one place. It doesn't matter where the inquiry comes from — whether it be the Web, phone, IVR, or email — and it drastically reduces the cost of managing channels."

The key to successful multichannel e-service delivery, Kolsky continues, is establishing company-specific best practices that standardize on the handling of service requests across channels. "All the channel does is create the message, so the

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channel used should no longer be the main issue. In other words, the message should be handled the same way no matter what the channel," he says. Within a customer interaction hub, the message would move in a logical workflow to a channel translator, which understands both the language of the inquiry and its intent. The inquiry then moves to a knowledge engine that searches all knowledge repositories and compiles an answer.

Depending on the system's level of certainty as to the accuracy of the answer, it will either send the answer to the customer automatically through the same channel, or move it to an agent for further review, although the user doesn't know a human is involved. And if the question is escalated to a human for corroboration, the system intelligently learns from the agent's actions so it will know how to respond the next time the situation arises.

Kolsky says the industry is starting to see early versions of these consolidated e-service hubs, and will see adoption increase significantly over the next two to three years.

Another area where the promised benefits of CRM and e-service are starting to see realization is through the emergence of customer analytics, says John Ragsdale, an analyst with Forrester Research. By integrating predictive analytics with operational systems to create closed-loop processes, marketing departments are able to leverage cross-channel customer data to develop targeted marketing programs that can be delivered via direct mail, email, or through personalized pop-ups during a self-service session.

“Cross-selling and upselling capabilities are becoming contextually integrated into the [customer interaction]. Analytics are intelligently mining all that 360-degree customer data, including propensity to churn, billing history and value to the company, and presenting it to the agent to dictate appropriate offers,” says Ragsdale. “That way, the agent can make a contextual offer that’s a natural extension to the subject the customer called about. It’s not just about selling, but about satisfying customers.”

### **Help Desks Get Savvy With E-Support**

Though many of the processes and technologies underlying internal IT support and external customer service delivery are the same, the motivators are different. “When you’re dealing in customer service, you’re trying to sell something and make sure the customer comes back. At the help desk, you’re trying to help them so they don’t come back,” says Kris Brittain, a Gartner analyst specializing in IT service issues. However, she adds, solving the customer issue efficiently is still the primary goal. With that in mind, internal help desks are turning to a host of e-support and automation technologies to make the most of limited resources while continually improving the way they deliver service. By offloading problem resolution to self-service and automated help channels and by automating repetitive, high-volume problem areas such as password reset, they’re freeing support staff to concentrate on more difficult problems. Meanwhile, in situations that require human intervention, agents are able to deliver assisted support remotely — via remote control, desktop-sharing, and other collaborative channels — to avoid site visits, speed productivity and dramatically reduce costs.

According to Ragsdale, it’s no surprise that IT shops are escalating their search for ways to automate and extend their support capabilities. According to recent Forrester research, 50% of IT shops surveyed report an increase in demand from their lines of business to add new applications, while the number of executives who view the IT infrastructure as mission-critical is increasing significantly. Yet today, a large majority of IT help desk problems — around 80% — are still solved by agents, which means there’s a significant need for automation and self-service options, says Ragsdale.

Indeed, while support automation can enable help desks to dramatically cut costs and allow them to concentrate on business-critical problems, too few companies have been leveraging it, according to Brittain. However, she adds, within the last year, a number of large companies have shown significant ROI from automating such functions as password reset and user ID management.

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**-John Ragsdale, Forrester**

"Over 60% of help desk problems involve a situation where users don't know how to do something because they weren't trained well, or they're experiencing common problems like forgetting their passwords," says Brittain. "Now that companies are finally bringing that kind of automation into their environments, they're dramatically

cutting their cost per transaction — the numbers are eyepopping." They're also making a significant reduction in the number of level one and two help desk employees, and refocusing them on more important tasks. "By decomposing the low-hanging fruit into consistent, repeatable processes and handing it over to automation, help desks have better audit and cost controls. We've been talking about this kind of automation since 1996 but it's finally happening in 2004," Brittain says.

Of course, in order to automate a support function, an IT organization has to do extensive root cause analysis and categorization on specific problems, and some companies rank "miscellaneous" issues as high as third on their list of problem types, says Brittain. But for those support functions that can be automated, the ROI can be significant. "The issue for IT spending is justification. If you want to make this capital expenditure for a software package, you have to determine the cost reductions and production efficiencies you can gain in less than 24 months. In internal technical support, you have to view ROI in terms of ending productivity outages, as they represent opportunities lost in terms of employee production."

### **Evaluating E-Service Offerings**

According to Forrester Research's John Ragsdale, the e-service market has changed dramatically in the last few years, with vendor consolidation, better integration, and offerings expanding to offer multichannel service. As is the case in most technology areas, e-service vendors typically got their start in a specific area (knowledge management or email management, for example) and developed core competencies there before moving to offer an integrated suite of products. At the same time, he says, large enterprise application vendors are expanding to offer more e-service capabilities, while new niche offerings emerge.

Ragsdale advises that customers evaluate e-service offerings based on vendor health and market share, functional breadth and depth, and overall technology strategy. His recommendations:

- Review the strengths of the various vendor segments (e-service suites, CRM suites, CTI platforms) to determine which best meet your business needs. Ragsdale says e-service suites, for example, are the most suitable choice for companies looking for "general-purpose" e-service — the need to centralize knowledge content and leverage it across assisted, automated and self-service channels. In many cases, the suites also provide packaged integration to call management and other CRM systems.
- Ragsdale recommends that businesses using enterprise CRM applications first evaluate their vendor's e-service module to take advantage of its tight

integration. However, he adds, such modules, including email response management tools, are only available in the latest releases of these suites, so customers may want to review niche offerings for specific needs.

- Companies with specific, complex requirements — the need for diagnostic tools for complex IT systems, or for search engines that review unstructured content throughout the enterprise — may need to look to niche e-service vendors, says Ragsdale.
- For contact centers with a high-volume of calls but low problem complexity, e-service offerings from CTI vendors likely make the most sense, according to Ragsdale, as they enable scalable routing of multichannel communications but don't have to concern themselves with complex diagnostics and problem resolution.

## **2004 Trends and Directions in Web-based Support: Help Desk/Service Desk Automation**



**Edison, N.J.**

### **Following FootPrints to World-Class Service**

While businesses struggle with unwieldy client/server-based service desk applications that require third-party integration to leverage a full range of multichannel support technologies, UniPress Software Inc. has steadfastly earned adherents by not only delivering an easily deployed and administered Web-based product line, but one with integrated, feature-rich functionality. With its FootPrints line of products, UniPress enables organizations to streamline their support operations through business process automation and centralized tracking of customer requests across multiple channels — speeding problem resolution, increasing first-call resolution, reducing incident costs, and improving agent workflow.

FootPrints tools target small and mid-market firms, as well as departments within large organizations, which use it for internal help desk support or external customer service — or both. Though the FootPrints technology started life as a help desk platform, its flexible design allowed UniPress to evolve it for external, multichannel customer service, in the form of its newly released FootPrints for eService. Both products are now seeing use in additional request tracking functions, including facilities management, business process management, and software development bug and issue tracking deployments.

“We see our customers typically coming from a couple of areas,” says Debbie Ingram, director of marketing for UniPress. “One kind of customer is a small to mid-sized organization that wants to automate support and centralize processes, sometimes replacing a basic support automation tool that doesn’t have enough functionality.” The other — a greatly increasing segment of UniPress’ customer base — comprise companies who are abandoning their existing support desk software to move to Web-based tools and processes in order to reduce costs and better adapt to changes. “We’ve got customers in a pretty broad mix of verticals across both public and private sectors,” says Ingram.

To accommodate such a broad mix, UniPress offers FootPrints in a number of incarnations. In addition to its offerings for internal and external service desks, UniPress provides FootPrints for Exchange, which integrates with Microsoft’s Exchange, Active Directory and other LDAP-based address books. Within its product lines, UniPress offers centrally managed, multichannel issue tracking, online self-service, knowledge management, two-way email management, live remote support, and automated reporting and metrics. Integrated, add-on tools include asset management, software deployment, telephony, and support knowledgebases. The products can be up and running in days, without any programming or consulting.

In addition to its range of features and functionality, FootPrints tools boast other significant benefits that make them attractive to customers. First, unlike other service desk products, which struggle to Web-enable various pieces of their client/server lines, the FootPrints technology was Web-architected from the ground-up, according to UniPress President Mark Krieger. That means the product gets installed on a single Web server — either at a customer site or under a hosted model — and anyone with a browser can access its capabilities.

Second is FootPrints' ease of use, enjoyed by agents, administrators and customers alike. "A CSR can use the product instantly, and it doesn't have to be administered by a programmer or a database administrator. Typically it's handled by a service desk manager, and it's all done through a Web interface," says Krieger. Customers with site servers can customize the product themselves and for those using UniPress' hosted model, the company provides initial project setup and customization at no additional charge.

To its rapidly growing customer base, UniPress recently added Crossroads Customer Solutions LP, an outsourced customer service provider based in Mansfield, Texas.

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The nature of its business dictates that Crossroads have a service platform that can deliver support across a range of channels as client needs dictate. The company's service representatives, who manage service interactions for clients in travel agencies, hotels and other service-driven industries, handle more than 25,000 inbound contacts per month,

across phone, fax, email, and Internet channels. The company was relying on a homegrown customer support automation system that didn't provide adequate integration with self-service channels, nor did it have a searchable knowledgebase to speed resolution, according to Calvin Dennis, chairman and CEO at Crossroads.

After an extensive search, Crossroads chose the hosted version of FootPrints for eService as its new service platform. "We realized that the most effective way for us to deliver outsourced world-class customer services was to embrace a customer support automation platform that was delivered in the same way as our business model," says Dennis. "More than just a hosted customer service desk solution, we sought a business enabler, and a system that could meet all of our current and future needs. But the real challenge was finding a hosted solution that was able to integrate with our existing telephony system and support our workflow processes."

Not only did Crossroads get the best feedback from UniPress customers, according to Dennis, but in product demonstrations "we discovered that FootPrints for eService offered the most comprehensible feature set, consisting of a browser-based interface, remote accessibility, and customization capabilities. It also clearly offered more flexibility, cost substantially less than other offerings, and was by far the fastest to implement."

Crossroads has completed its migration from its homegrown system to the fully hosted FootPrints for eService environment, managed by UniPress. Integrated with Crossroad's third-party telephony platform, FootPrints intelligently routes incoming phone calls, voicemail, e-mail, fax, and chat communications to available CSRs. The

system's central repository for all trouble tickets, communication, and solutions allows the company to easily create knowledgebases for agent and customer use, says Dennis. Additionally, FootPrints for eService allows Crossroads to develop external knowledgebases for clients, providing them access to self-service online applications should they want to find solutions themselves.

"We use the FootPrints for eService solution to identify customers, access knowledgebases, resolve issues, log transactions, and report on thousands of transactions each month," says Dennis. "The way FootPrints for eService delivers these capabilities is what sets it apart from its competitors – and what empowers us to differentiate our company in our own marketplace."

### **About the Writer:**

Kym Gilhooly has more than ten years experience covering information technology and the ways it addresses high-level business issues in such vertical industries as financial services, manufacturing, education, retail, transportation, media, biotechnology, telecommunications and utilities. Before becoming an independent contractor, she served as editor-in-chief of IT Support News, a business technology publication. Previously, she served as managing editor of Software Magazine, which earned two Jesse H. Neal Awards during her tenure, and as copy chief of Computer Design.

