



White Paper

Support Services as a Competitive Differentiator

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December 2017

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IDC OPINION

Fast and effective support will be a competitive differentiator for companies and represents a strategic opportunity in a digitally transformed world. As the number of devices increases and users expect that the time to resolution contracts rapidly, organizations are challenged to deliver uninterrupted access and use of IT devices and applications. Digital transformation initiatives are built upon the ability to leverage IT resources anywhere and anytime needed, and the interruption or slowdown of any of these devices, applications, and workloads has an immediate negative impact on an organization. For these reasons, fast and effective support is a key foundational requirement in a digitally transformed world.

The support organization plays an integral part of determining the overall end-user experience, and fulfilling this role becomes more difficult as the workforce and technology evolve. The ability to provide support on any type of connection, in any location, in any language, and via end users' preferred mode of communication introduces new complexities to the support organization. Although the majority of organizations recognize how critical support is, it is concerning that 22% of service provider support organizations reported that their executive leadership does not understand the critical role of support. These organizations are vulnerable at a time when demands on support are escalating. In addition, 42% of organizations said that investment in more advanced technology to empower support organizations will be limited. Many service provider organizations are operating in a reactive and less mature fashion, and they risk undermining the end-user relationship if they are not able to transform their processes to more proactive methods.

Delivering a best-in-class support and developing a holistic approach to improving the end-user experience are vital. Organizations' ability to focus on improving processes to streamline and support a positive experience with technology will yield returns in productivity as well as end-user satisfaction.

IN THIS WHITE PAPER

To understand the impact of support and technology to deliver service/support, IDC surveyed end users on their experiences and preferences both at work (support received from their company's help desk) and for their personal devices (support received from equipment or solution manufacturers). The similarities and differences between these different support experiences are helpful in shaping strategies and uncovering opportunities to improve the support experience. IDC also surveyed providers of support to gain their input and beliefs regarding the technology they use to deliver support. Findings from all three of these respondent types are highlighted in this white paper.

SITUATION OVERVIEW

Service desk support is a vital resource for any end user; it is designed to provide an immediate point of contact that is multichannel (whether it is through chat, a self-help portal, or an actual person) when end users experience issues with any of their devices or software. The ultimate goal of the service desk is to offer problem resolution as quickly and as efficiently as possible, which in turn makes the user more productive. Service desks employ knowledgeable personnel and extensive tools to assist with device issues, utilizing a variety of support models. Implementation of these models varies among service desk providers and enterprise customers. In one instance, support may be completely outsourced to another organization. In another, it may be several people who perform some of the support in-house and several people from another company that are contracted for additional support when needed, or support may be completely provided by internal technicians. Whichever support model is chosen, a service desk must have knowledgeable personnel trained in the appropriate technologies to deliver the optimal business outcome. IDC sees a change in the way service desks function, and with the advent of remote support tools and the influence of the 3rd Platform technology (based on IDC's four pillars outlined later), we see innovation in the following areas which is enabling better and more efficient service desk functionality:

- **Social:** For millennials, social is a preferred method for resolution. The ability to use chat or support forums to resolve issues and the ability to connect with help via multiple modes are becoming table stakes for support organizations. Enterprises and service providers should also invest in a platform or community where users can express their pleasure or displeasure with service desk services.
- **Mobile:** It refers to the ability to provide support from a smart device and/or provide support to a smart device or laptop simply and easily anytime anywhere. The experience for a mobile user must look and feel exactly the same as if the user is in the office. With bring-your-own-device (BYOD) and mobile initiatives, this support is a must-have.
- **Cloud:** It provides the user with support or information about any issue anytime from anywhere in a secure and safe manner.
- **Big Data/analytics:** It involves utilizing data to help troubleshoot and resolve issues quickly, mine data to look for "like" issues to help populate "FAQs," and/or create a database repository of reoccurring issues, which can be used to help remediate issues faster and also learn how the user interacts with systems and applications to create a "persona," which allows users to interact with support in a way they choose.

The degree to which support is effective is now a competitive differentiator and should be approached in a more proactive and predictive manner. While most service providers are cognizant of the important role that service and support play in developing and maintaining a partnership with customers, IDC's research has uncovered key areas where existing tools are inadequate and unable to deliver the capabilities required to meet demand. As the demands increase in the next 18 months, any organization that does not address these needs today will be at a disadvantage and at risk for damaging relationships with customers, employees, and partners.

What End Users Want and What They Are Experiencing

Better communication and faster problem resolution are the top priorities for those requesting support services. The overwhelming majority (89%) of respondents believed that having a support person they can communicate well with is important (see Figure 1). Regardless of whether the survey respondent was someone receiving support from a help desk at work or was someone receiving support for a

personal device or technology, the need for better communication was ranked as the most important factor. It's cliché to repeat the maxim of "communication is key." It's an elementary fact that improving understanding and dialogue leads to better problem solving and fewer conflicts. However, IDC believes it is worth noting that although many organizations understand the importance of improving communication and strive to do so, actually achieving better communication remains elusive. Why? Because diverse levels of technical expertise and varied physical location reduce the effectiveness associated with the ability to explain and comprehend. As the number of devices and platforms increases, the complexity of communication will also increase.

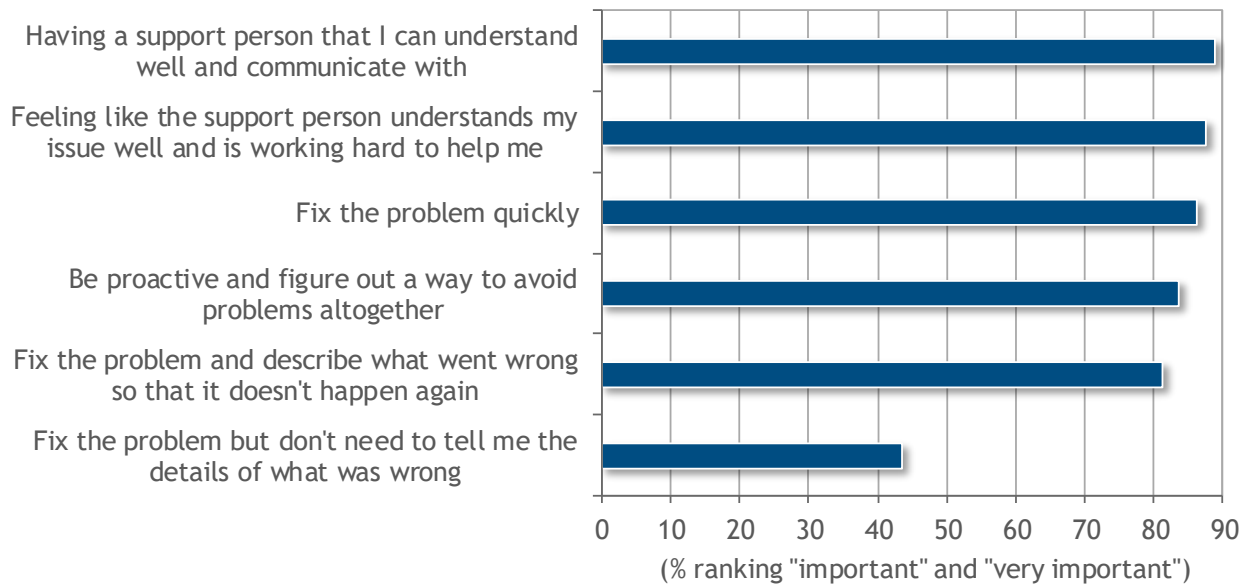
When asked about their recent experiences with support for their work-related devices (via company help desk), almost half of respondents were tepid in their response; 43% said that they have had a mix of good and bad experiences when asking for help. Only 5% had all bad experiences, but the overall customer experience leaves a lot of room for improvement.

When asked why they believed that the support they received wasn't effective, users blamed the support organization for not understanding the issue or said the support organization was too slow or not responsive at all (see Figure 1).

FIGURE 1

What End Users Want from Support Organizations

Q. When you reach out for help with your technology, how important is each of the following?



n = 453

Source: IDC's *Enterprise User Experience Survey for LogMeIn*, 2017

Impact of Ineffective Support

Negative support experiences have widespread impact on a company, ranging from lost revenue because of lack of worker productivity to damaged company reputation. Most would assume that

support is critical to worker productivity, and employee feedback confirmed this belief. When workers do not receive the support they need, they say they cannot work, spend time online searching for a resolution, and draw their coworkers away from their own jobs to seek help as well. The net impact is reduced productivity.

On the flip side, the newer generation of "millennial" and Gen X workers is much more vocal than baby boomers when something good happens. Take, for example, consumer support scenarios; when younger people have a positive experience with support, they share this experience on social media much more often than older people do. This data confirms that effective support can be used as a competitive differentiator and has the power to drive more business and therefore more revenue.

People closely relate their support experience with their feelings about the company overall – for both first-time customers and new hires – and this underscores the critical role that support plays in a company's success. For this reason, the support organization's goals and KPIs should be closely aligned with the company's overall goals. The strategic value of an effective support organization should not be ignored as companies invest in technology to drive better support experiences.

Adapting Solutions to a Diverse User Base

The barriers to good communication – language and technical expertise – will become more challenging as organizations are increasingly tasked with supporting a global base of clients and employees. Another hurdle for support is the increasing number and diversity of device types and environments to support, further straining existing support technologies. The ability to understand the nuances of an evolving base of users and the devices they use and adapt support programs to them is a challenge for all support organizations. Technologies such as remote access and control are helpful in overcoming communication barriers, with more than 85% of end users saying that this technology resolved their issue more quickly than other methods of support.

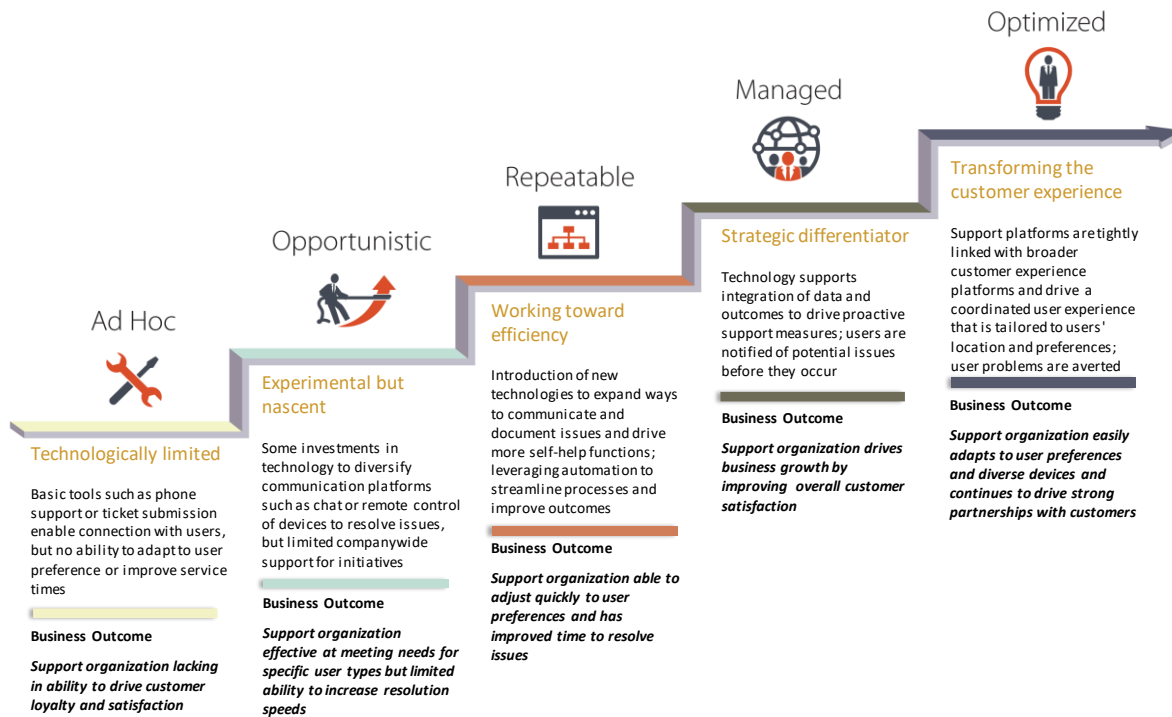
The ability for a support organization to adapt its processes for different user types is indicative of its relative maturity. Today, most support providers are at the earlier stages of maturity in their ability to deliver fast and effective support. Support is generally delivered via phone, chat, or remote control session in a more reactive manner. Fewer organizations have invested in more sophisticated tools that enable data mining to support advanced self-help capabilities and employ predictive or proactive support methods (refer to Figure 2). Remote support is tightly linked with increased customer satisfaction, with three-quarters of support organizations using remote support tools in agreement that these tools improve the customer experience.

Developing an Effective Support Strategy for a Digitally Transformed World

Challenges to improving the end-user experience include existing company culture and processes as well as lack of executive support. Enacting change requires a holistic approach that includes garnering widespread organizational support as well as investment in tools and processes to enable the shift to a more proactive and adjustable support program. Figure 2 outlines the stages of maturity in support programs.

FIGURE 2

IDC MaturityScape: Support Services – Stage Overview



Source: IDC, 2017

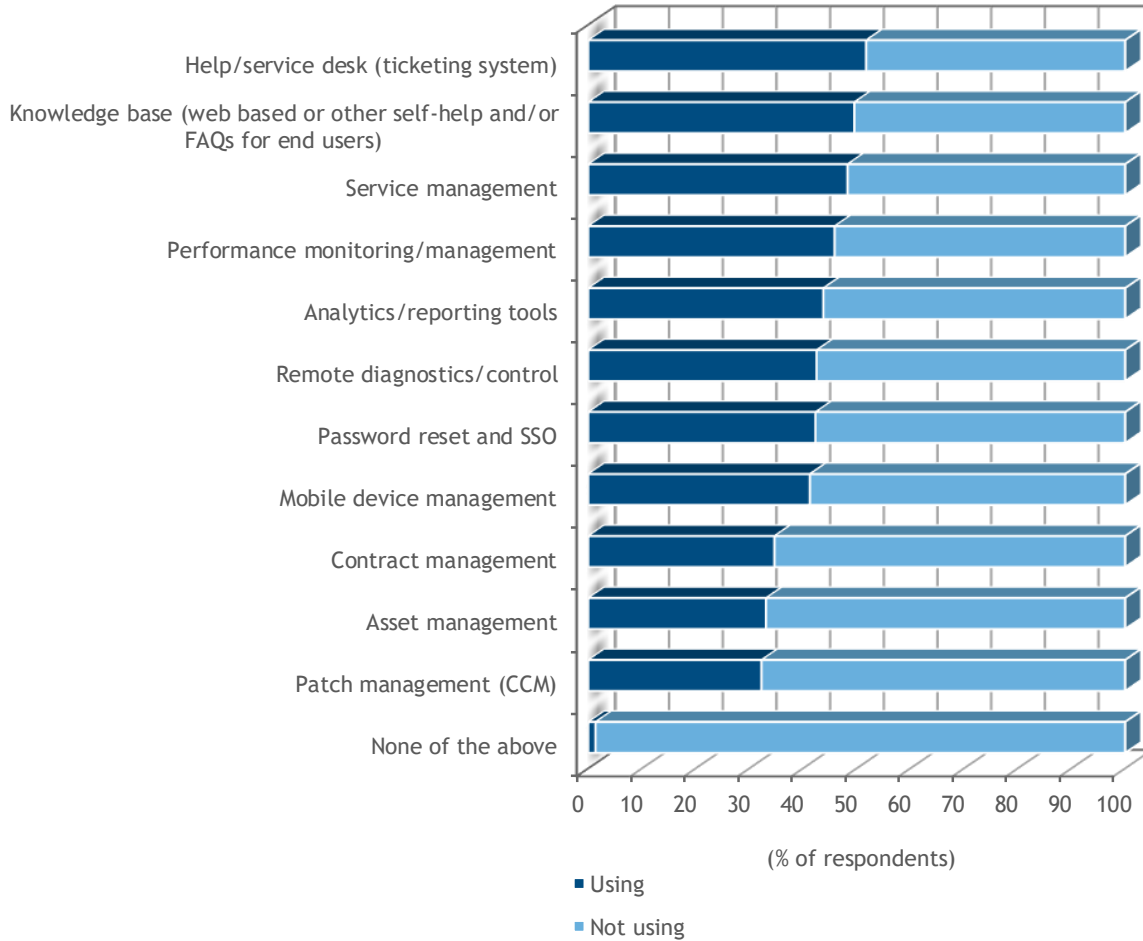
Current Use of Support Solutions

Figure 3 shows an overview of the types of tools organizations are currently using. Considering the critical role of support in customer satisfaction, employee productivity, and company reputation, IDC considers adoption of many of these support features to be low, indicating the relative immaturity of the support services. Concerning is the lower usage of tools by enterprise help desk organizations that are serving multiple external customers. This segment of respondents has a very customer-facing role and therefore should be highly focused on driving better outcomes to strengthen buyer relationships. However, this segment reported lower adoption of tools than other segments.

FIGURE 3

Current Use of Support Tools

Q. Which tools is your help desk/service desk currently using?



n = 954 (all respondents)

Source: IDC's *Service Provider, Enterprise, and SMB Support Provider Survey, 2017*

FUTURE OUTLOOK

Given the changing user base and preferences for communication types, combined with a proliferation of new devices, support services will need to undergo a transformation to meet users' needs in the near future. Today, the average number of compute devices per digitally savvy person is 9.5, and the influx of IoT initiatives in the near future will only increase the complexity that users face. In addition, the ability to provide support on a global scale will increasingly be required and will strain existing infrastructure because of the additional communication challenges and cultural nuances this will expose. Organizations that are able to leverage artificial intelligence and automation will be able to

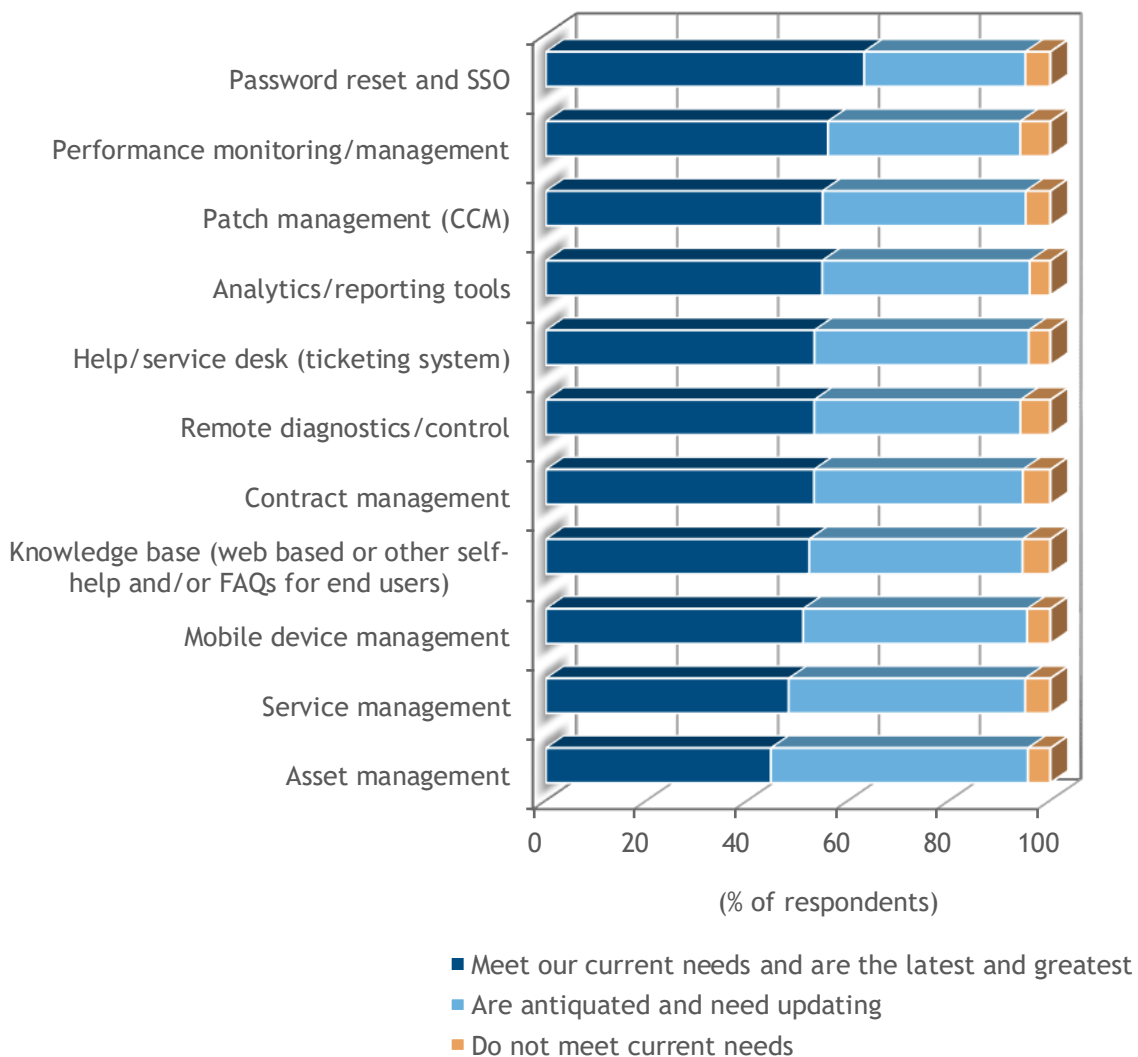
transition from a sufficient support group to a transformative support group that is essential to customer success.

On average, about half of respondents consider their existing tools antiquated and in need of updating (see Figure 4), while the other half feel that their tools meet their needs, and it is certainly a positive message, considering the coming challenges in delivering support; if investment does not keep pace, organizations risk jeopardizing customer relationships, reducing productivity, and missing out on revenue opportunities.

FIGURE 4

Attitudes About the Effectiveness of Existing Support Tools

Q. How do these tools align with your current needs?



n = 954

Source: IDC's *Service Provider, Enterprise, and SMB Support Provider Survey, 2017*

Today, most organizations aren't using the tools they already have to their fullest capability. Most support organizations are fully aware of the importance of delivering effective service quickly but have not refined the operational processes and leveraged the appropriate tools to get to the more mature phases of support services.

Support organizations' strategies and measurements for success are often aligned with broader company goals of customer satisfaction and retention. Most organizations have a customer success organization that reports into top leadership, highlighting the recognized importance of the support organization. This structure is a critical first step in driving positive change for a support organization – having the attention of upper management. With this attention comes scrutiny as well, and support organizations that are proactive and prepared to meet the coming demands are more likely to be perceived as an enabler to innovation and transforming the customer experience. Those that are not prepared will be viewed as a barrier to success.

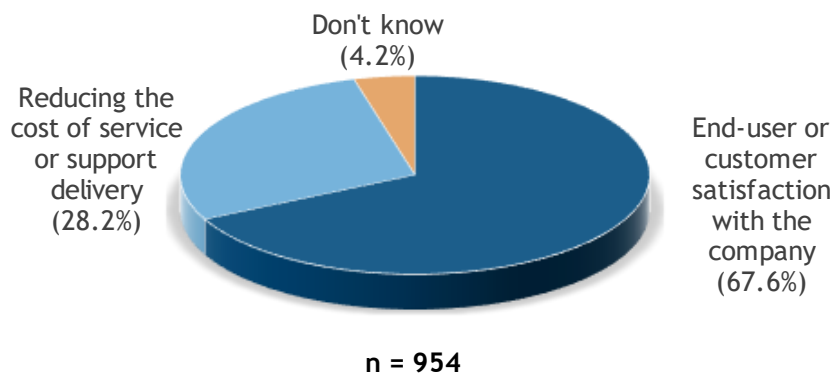
Broadly categorizing support organizations, IDC believes that about 20-25% are stagnant and at risk of being recognized as a detriment to customer loyalty and satisfaction. About 50% have made some changes to their internal processes, or made investment in technologies, but are considered less mature because they have not been able to adjust support needs for specific user types and have a limited ability to speed the time to resolution. Only about 25% are able to drive strong partnerships with customers based on the adaptability and intelligence of their support organization. These more mature support organizations have made more coordinated efforts for improvements including their internal processes and more advanced toolsets.

Concerning is the large number of organizations that are prioritizing cost over the customer experience (see Figure 5). This may prove to be a short-term strategy for cost reduction that will have longer-term impact on the company overall. For organizations facing a challenge of justifying investment in improving the support experience, the ability to link customer loyalty and perception with company growth is vital.

FIGURE 5

Organizational Priorities in Cost Versus Customer Satisfaction

Q. If you had to choose, which would you say is more important?



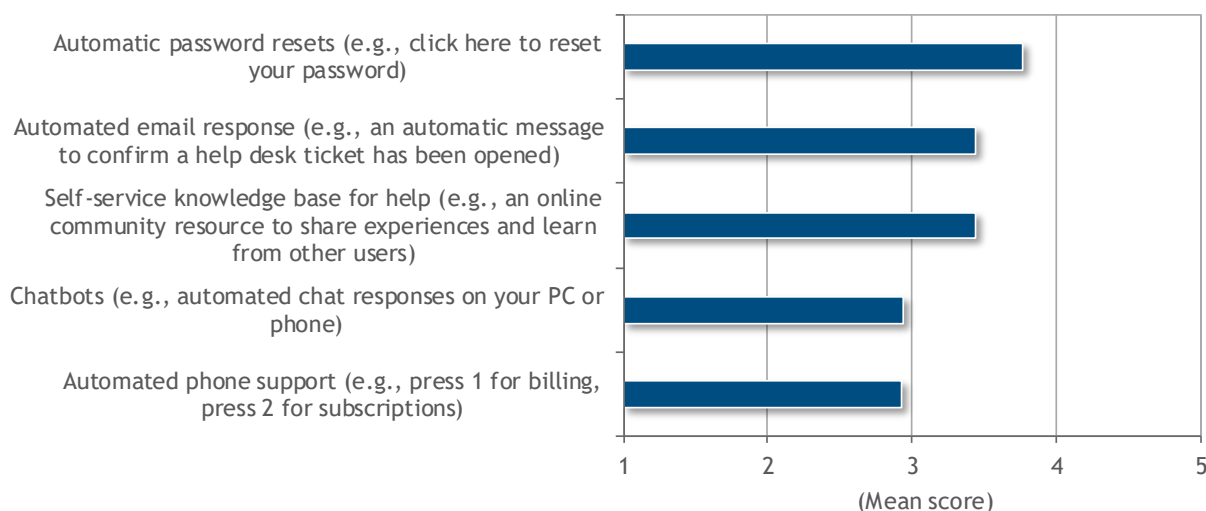
Source: IDC's *Service Provider, Enterprise, and SMB Support Provider Survey*, 2017

One of the major themes in developing a mature support organization is the ability to be adjustable – to meet the needs of changing users, devices, and geographic locations, all while improving time to problem resolution. Achieving this greater level of adjustability will require adopting technologies that enable artificial intelligence and automation. Contrary to widespread opinion, automation is not despised by most users. But users will increasingly demand better automation technologies that leverage intelligence and do not cause them greater effort. Figure 6 shows users' attitudes toward automation technologies.

FIGURE 6

User Attitudes on Automation Technologies

Q. Please rate how much you like the following automation technologies on a scale of 1-5, where 1 = do not like and 5 = like very much.



n = 453

Source: IDC's *Enterprise User Experience Survey for LogMeIn*, 2017

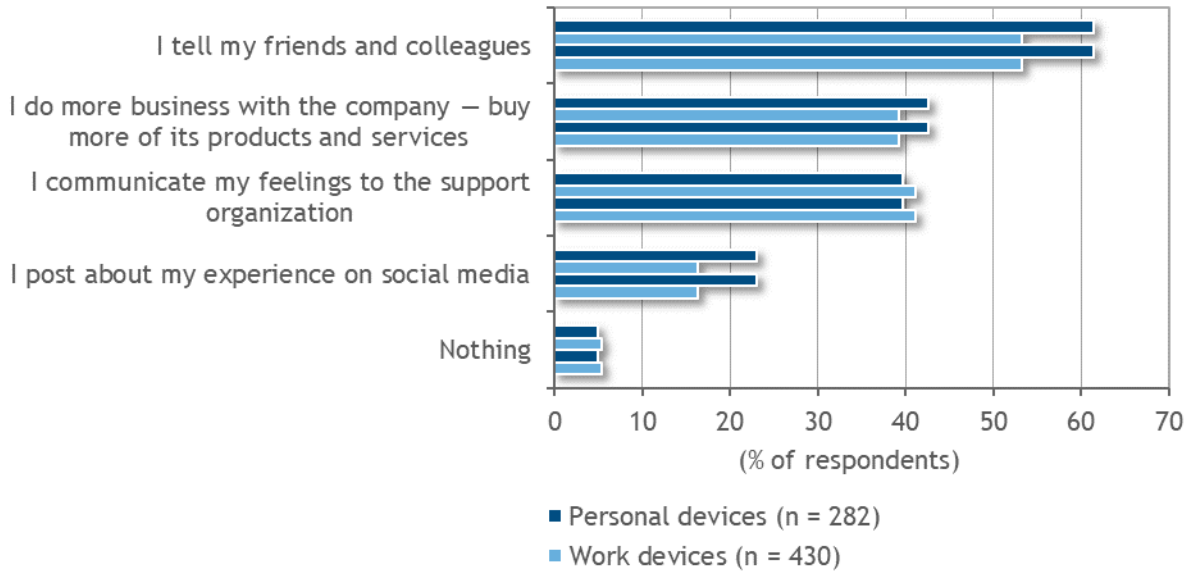
CHALLENGES/OPPORTUNITIES

Support organizations are positioned well to shape customers' perceptions and drive greater loyalty; this inextricable link provides opportunity for support organizations to differentiate and drive more revenue for their company. When consumers have a good experience with support, they buy more products from the company and implore their friends and colleagues to do the same (see Figure 7). Social media and propensity to share positive and negative experiences are important to factor into support strategies because they highlight and underscore the critical value of a support organization to the business.

FIGURE 7

Impact of Support on Business

Q. What happens when you have a good experience with support?



Source: IDC's *Enterprise User Experience Survey for LogMeIn*, 2017

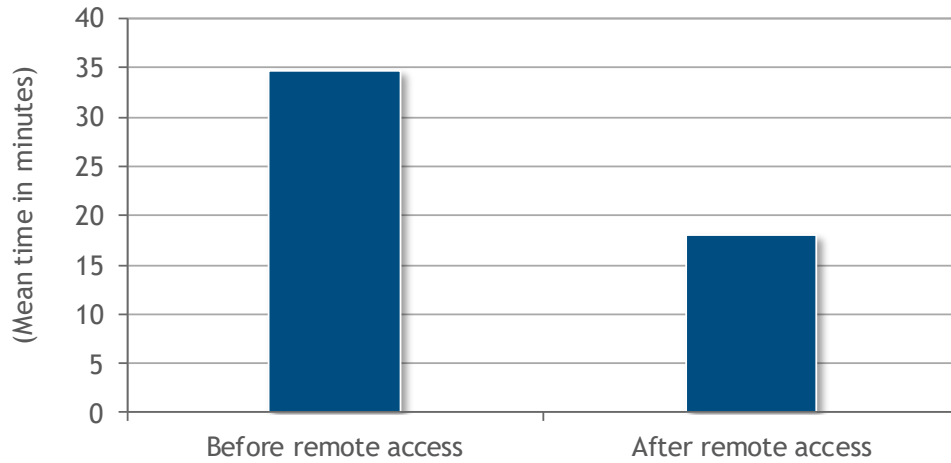
Along with this strong opportunity to drive value come greater challenges as the number of devices and the complexity of platforms increase and as the expectations of users for speed of service – and even the expectation that they should never have a problem – also increase. Support organizations are challenged by these forces and will need to strategize on working smarter and not necessarily harder. Accomplishing this will require greater reliance on artificial intelligence, which requires new skill sets and technologies to leverage well.

For almost one-third of support organizations, the cost of new technology is a hurdle to change, and many indicate that investment will be limited over the next two years. For this portion of the market, it is incumbent to translate and align best practices in support with better business outcomes. More mature support organizations have already accomplished this. An example is investment in remote-enabled support tools. Organizations that have invested in technology to deliver support remotely have improved the customer experience and dramatically reduced time to resolution, which are also users' top 2 priorities: effectiveness and speed of support. Figure 8 illustrates the dramatic impact of remote tools, with the time to resolve issues reduced by almost half after the implementation of remote access and control technology.

FIGURE 8

Impact of Remote Access and Control on Speed of Support Experience

Q. What was the average time to resolve issues (before and after deploying remote access tools)?



n = 954

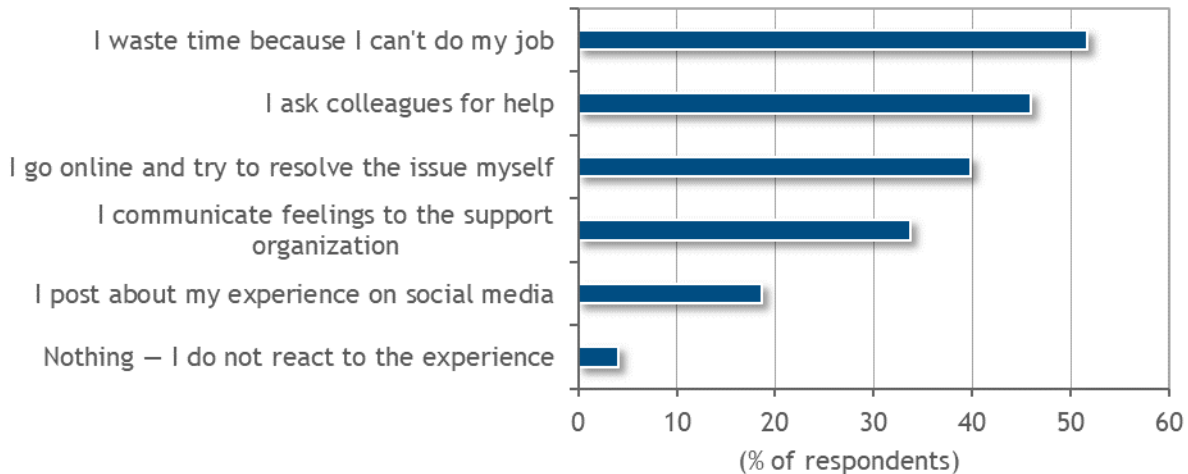
Source: IDC's *Service Provider, Enterprise, and SMB Support Provider Survey, 2017*

Support organizations can use fast, effective service to their customers as a competitive differentiator. Creating and promoting best practices will pay off with stronger partnerships with customers and increased trust. The result will be more business entrusted to your care, and therefore more revenue. The impact of time savings, however, is probably the most significant on the workforce as it allows the business to remain productive and end users to focus on their core competencies. As shown in Figure 9, when workers are having trouble with their technology, they not only are unable to work but also frequently ask their coworkers for help. The net impact is two or more workers who are not working.

FIGURE 9

Impact of Downtime on Productivity

Q. What happens when you don't receive fast and effective support for your work devices or applications?



n = 453

Source: IDC's *Enterprise User Experience Survey for LogMeIn*, 2017

CONCLUSION

The ability to provide fast and effective service is inextricably linked with customer satisfaction, worker productivity, and business success. Support providers should examine their maturity in their ability to deliver service and prioritize investment to move into more mature phases to not only meet the needs of a changing customer base but also use this service as a means to strengthening their partnerships with customers. A great need exists in the market for reaching customers in new ways and helping them in turn connect with their end customers.

While most organizations agree that providing good support is a top priority, IDC's survey findings show that when it comes to investing in tools that will drive improvement, many organizations remained challenged to fund these investments.

Knowing the coming demands on support organizations including more devices, more mobility, and an increasingly distributed and global end-user customer base, IDC believes that investment in advanced technologies, streamlined processes, and people skills is necessary. Organizations that do so will be able to differentiate their business and improve productivity by expanding their ability to communicate in a multitude of ways and being flexible to adapt to changing preferences.

METHODOLOGY

In August 2017, IDC conducted two surveys to better understand how existing support technologies were meeting the needs of a changing user base. One survey focused on the end-user experience, and the other survey examined enterprise and service provider support programs and the tools they used, with the goals of assessing the current state of support, identifying areas of success, and uncovering areas that needed improvement. This provider survey was fielded to a global audience of professionals who work for service providers and enterprises within the support organization. Survey respondents were from a broad mix of industries, company sizes, professional roles, and geographic regions.

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