



## 2010 Service and Leadership Trends in Customer Support

- SupportIndustry.com Research Results -

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## SupportIndustry.com Research Results: 2010 Service and Leadership Trends in Customer Support

### *Executive Summary*

Customer support centers generally represent an organization's face to the customer. Its service reputation is one of the key drivers of an organization's brand, public reputation, and market share. But when you look at the field's literature and conferences, what you often find is a world that revolves around ACDs, IVRs, first-call resolution rates, and staffing algorithms – and not always its core reality of serving people, which directly affects retention rates, net promoter scores, and upsell/cross-sell opportunities

This groundbreaking survey, conducted by SupportIndustry.com and sponsored by Citrix Online, is meant to assess the state of customer service issues in the customer support industry: How our customers and agents are doing, how we are managing people and measuring performance, how effective our training and coaching is, and how we are using technology to get closer to customers. It is meant to be a snapshot of what we in the support industry fundamentally do and how well we do it.

This survey was conducted in January 2010 and represents a cross-section from a wide range of vertical industries, including technology (19.7%), services (8.4%), and manufacturing (8%). The majority of respondents were at a senior level, with over half in corporate or customer support management positions and approximately 30% divided between supervisory or front-line positions. Roughly 60% of responses were from firms with smaller support operations with support budgets of less than \$250,000 or less than 500-1000 employees; however, the top line was well represented with nearly 17% from support operations with annual budgets in excess of \$1 million.

### *Survey Highlights*

**Support really does make people happier.** Support transactions have a measurable impact on customer frustration levels – close to 85% are frustrated before the transaction, but more than 60% are not frustrated at all afterwards. Likewise, over a third of support operations deliver customer satisfaction levels in excess of 90%, while fewer than 15% deliver less than 80%.

**Training helps, but only the right kind.** Training has a measurable impact on customer satisfaction levels, but only when (a) you train both supervisors and frontline staff and (b) your training approach includes accurate call simulations and measurable performance objectives. There is also a correlation between the amount of training you do and how satisfied your customers are.

**Agents do well – with the right tools.** Over 80% of respondents rate their agents as being confident, and the vast majority report good relationships between agents and their managers. The biggest challenges remain access to problem-solving technology, as well as communications and people issues on both the internal and external side.

**Performance evaluation is an art and a science.** Metrics, customer feedback, and the old standby of what the boss thinks all remain a big part of how agents are evaluated. Session monitoring, surveys, and coaching are less frequently used, showing a trend toward less labor-intensive approaches for performance evaluation.

**Remote support is here to stay.** The era of blindly troubleshooting customer issues over the telephone has gone the way of the 8-track tape. An overwhelming majority of respondents now use remote support tools, in operations of all sizes, particularly for remote access to customer systems. Other features such as file transfer and remote diagnostics are popular as well, while sites using these tools for live collaboration and escalation remain in the minority.

### *How Happy Are Our Customers?*

Behind all the numbers of a support operation lies one simple objective: solve people's problems and make them happy. And on the whole, support professionals do a pretty good job of this. According to the survey results, close

to 85% of the people who contact a support team are at least somewhat frustrated – but at the end of their session, over 60% are not at all frustrated . Even more impressively, the 35.8% of customers who are "frustrated" or "very frustrated" before a support transaction drops to a very modest 7.6% afterward.

How would you rate the average frustration level of your customers at the \*beginning\* of a session?

Answer	0%	100%	Number of Response(s)	Response Ratio
Very frustrated			19	7.6 %
Frustrated			70	28.2 %
Somewhat frustrated			117	47.1 %
Not frustrated at all			30	12.0 %
No Response(s)			12	4.8 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

How would you rate the average frustration level of your customers at the \*end\* of a session?

Answer	0%	100%	Number of Response(s)	Response Ratio
Very frustrated			4	1.6 %
Frustrated			15	6.0 %
Somewhat frustrated			66	26.6 %
Not frustrated at all			151	60.8 %
No Response(s)			12	4.8 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 1. Average frustration level of customers at the beginning and end of a session.

Translating this to a more popular support metric (i.e., customer satisfaction levels), we see guarded optimism overall. A little over a third (34.2%) rate their average customer satisfaction at over 90%, with nearly half of these rating an impressive 95% or more. Less than 15% rate customer satisfaction levels as less than 80%, and fewer than half of these respondents report customer satisfaction as being below 70%. Perhaps even more telling, however, over a third of respondents either do not measure or didn't report their customer satisfaction levels; in fact, only 38.7% of respondents give their customers an opportunity to fill out a survey following a transaction.

If yes, what is your support team's average customer satisfaction rating over the past year, expressed on a scale of 0% (worst) to 100% (best)?

Answer	0%	100%	Number of Response(s)	Response Ratio
< 50%			6	2.4 %
50%-70%			12	4.8 %
71-80%			19	7.6 %
81-90%			42	16.9 %
91-95%			45	18.1 %
> 95%			40	16.1 %
No Response(s)			84	33.8 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 2. Average customer satisfaction levels over the past year.

While these kinds of results compare well with other services – for example, according to *Consumer Reports*, only 53% of people are "very satisfied" with the service at their automobile dealer<sup>1</sup> – they still point to room for

<sup>1</sup> Ransom, K., "Consumer Reports Repair Shop Satisfaction Survey," AOL Autos, June 23, 2008, <http://autos.aol.com/article/auto-repair-shop-survey>

improvement: when nearly 35% of people are still at least somewhat frustrated by the end of the transaction, this translates on a global scale to many unhappy people.

Similarly, these customer satisfaction numbers are good, but not grounds for resting on our laurels: according to a classic *Harvard Business Review* study, for example, Xerox found that customers rating you a 4 out of 5 are six times more likely to defect than people giving you high-fives<sup>2</sup>. More importantly, customer satisfaction levels should be measured and promulgated freely throughout the organization.

*So these survey results show that we should keep up the good work, but also keep measuring and improving how happy we make our customers through evaluations, such as customer surveys.*

### **Training versus Customer Satisfaction**

Does training increase customer satisfaction levels? Major corporate educational firms will tell you so, as will every motivational speaker on the face of the earth. But what do the experienced support professionals have to say about the impact of training on their customer satisfaction levels? A resounding "Yes, but..."

An analysis of the correlations between training and customer satisfaction responses in this survey yielded an interesting result: it is not necessarily training itself that improves customer satisfaction levels, but rather specific factors in training delivery. The data showed three key factors that impacted customer satisfaction levels:

- (1) Training supervisors as well as frontline employees.
- (2) Simulating actual support calls.
- (3) Measuring performance outcomes.

Figure 3 compares the distribution of customer satisfaction levels for all respondents versus those who train *both* frontline *and* supervisory employees. It shows a significant jump of 4.4% in the percentage of sites whose customer satisfaction levels are in the top two tiers above 90% (57.1% versus 52.7%), with a measurable jump in the group reaching the rarified levels of 95% and above.

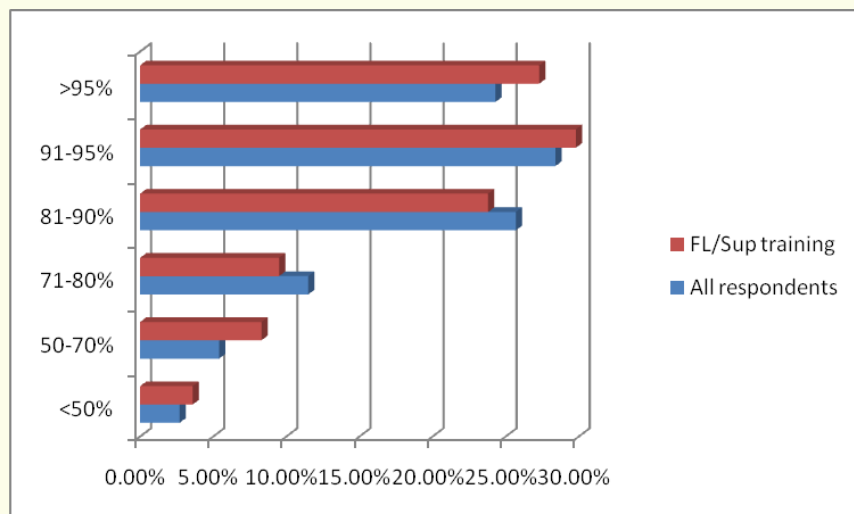


Figure 3. Customer satisfaction levels: training frontline and supervisory employees versus all respondents.

<sup>2</sup> Jones, Thomas O, and Earl W Sasser, Jr. "Why Satisfied Customers Defect," *Harvard Business Review*, (1995): 88.

in examining training factors such as the type of training (e.g., in-house, licensed, certification program, etc.), as well as specific training approaches used, only two factors jumped out as making a significant difference in top-tier customer satisfaction levels:

- (1) Call simulation
- (2) Performance measurement

Both of these are very outcome-related measures that differentiate specific targeted training from more general programs. Figure 4 compares the percentage of respondents using these approaches whose average customer satisfaction is over 90%, showing a nearly 10% jump for those using simulated support calls and performance assessment.

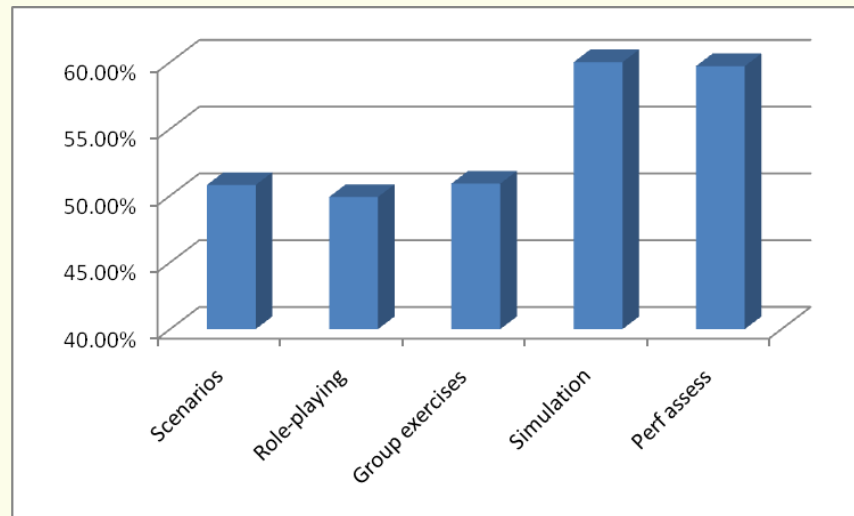


Figure 4. Training techniques used by respondents with customer satisfaction levels above 90%.

Support center agents often experience intense, non-stop interpersonal contact, combined with customer issues and frustrations that often go beyond the needs of a standard customer-facing position. These results underscore a critical difference in contact center training versus traditional customer service training: it must be tailored to the specific needs of the agents and support measurable outcomes.

One other interesting point from the data, although it involved small sample sizes, was the impact of large amounts of training on customer satisfaction. Among the so-called "supertrainers" who invested more than three weeks a year of training in their staff, two-thirds (10 out of 15) reported customer satisfaction levels over 90%. Conversely, only half of those investing three days or less of training (11 out of 22) reported similar results.

Perhaps the most telling point of all comes from the respondents' own assessment of their training effectiveness: Overall average ratings were a modest 2.6 out of 4, putting them in the category of "somewhat effective." This points to considerable room for improvement in support training approaches.

So what do these survey results mean for your own training plans? Perhaps you should put the motivational speaker or "customer service expert" on hold and work with people – inside or outside your organization – who understand the needs of a support team.

## How Are Your Agents Doing?

If agent confidence translates to happy customers, the survey results reveal a good landscape overall. Over 80% of respondents characterize their staff as being "confident" or "very confident," with over a third falling into the higher category. Only 12.5% rate their teams as being only "somewhat confident," with only one out of 248 responses stating that their agents were "not confident at all." Given that confidence is often a product of training and coaching, and given a good base to work from, strategic investments to boost more agent teams into the realm of "very confident" may represent a high-payoff activity for the future of many support teams.

How would you rate your staff's level of confidence in handling customer situations?

Answer	0%	100%	Number of Response(s)	Response Ratio
Very confident			87	35.0 %
Confident			116	46.7 %
Somewhat confident			31	12.5 %
Not confident at all			1	<1 %
No Response(s)			13	5.2 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 5. Ratings of staff confidence levels in customer situations.

*Drilling down into specific areas of concern for agents, the biggest single area (20.9%) is access to problem-solving resources such as remote diagnostics and collaboration tools.*

This is an issue that also drives the overwhelming acceptance of remote support tools discussed in a later section ("Remote Support Is Here to Stay"). Other major areas include resolving issues (15.3%) and keeping fresh amidst the same kinds of transactions (14.1%). People issues such as saying "no" to customers (12%), dealing with customer anger, and people who talk too much (each 6%) form another major bank of concerns, one that can often be addressed by effective communications skills training. Lack of technical support knowledge and average handle time round out the list with 6.8% of responses each.

What do you feel is the biggest "stuck point" for your agents? (Choose one)

Answer	0%	100%	Number of Response(s)	Response Ratio
Dealing with customer anger			15	6.0 %
Maintaining a low average handle time			17	6.8 %
Issue resolution			38	15.3 %
Access to problem-solving resources (e.g. remote diagnostics, collaboration, etc.)			52	20.9 %
Saying "no" to customers			30	12.0 %
Handling clients who will not stop talking			15	6.0 %
Keeping fresh amidst the same issues repeatedly			35	14.1 %
Lack of tech support knowledge			17	6.8 %
Other			16	6.4 %
No Response(s)			13	5.2 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 6. Summary of biggest "stuck points" for agents.

Meanwhile, how are relationships between agents and their managers? According to survey respondents, who are overwhelmingly managers and supervisors (but 14.9% are frontline agents), reality is nothing like what you read in comic strips like "Dilbert." Over a third of respondents report a cordial and constructive relationship, over 40% say that things are relatively good, and less than five percent report things as being frustrating or worse.

How would you rate the relationship between agents and their supervisors?

Answer	0%	100%	Number of Response(s)	Response Ratio
Hostile and unproductive			2	<1 %
Frustrating			10	4.0 %
Neither bad nor good			30	12.0 %
Relatively good			102	41.1 %
Cordial and constructive			91	36.6 %
No Response(s)			13	5.2 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 7. Rating of relationships between agents and supervisors.

When it comes to the biggest staff issues faced by support professionals, perhaps the most telling statistic of the survey is that nearly 32% of respondents did not list *any* problems, while several others listed positive goals such as striving to be the best. Moreover, less than 5% listed traditional employee problems such as absenteeism, turnover, or attitude problems as their biggest concern. So what were the biggest issues? Communications (7.6%), workload pressures (4.4%), proper documentation of issues (3.2%), and managing different skill levels (3.2%) represented the other main clusters within a broadly varying list of concerns.

### Managing Agents: Less "Big Brother" but More Accountability

In a world of increasing metrics, tighter margins, and better technology, are support managers keeping closer tabs on their staff? These survey results indicate that these trends have not led to a "Big Brother" world where agents are constantly watched; however, their aggregate performance is generally measured at a quantitative level, together with the subjective evaluations of their supervisors.

Session monitoring, for example, is only performed by close to one-third of respondents (35.8%), most of whom use these monitoring sessions as both a coaching (38.7%) and a performance evaluation (33.8%) tool. The fact that a slightly higher percentage reports such coaching versus monitoring itself tends to indicate that some of this coaching usage is sporadic rather than regular.

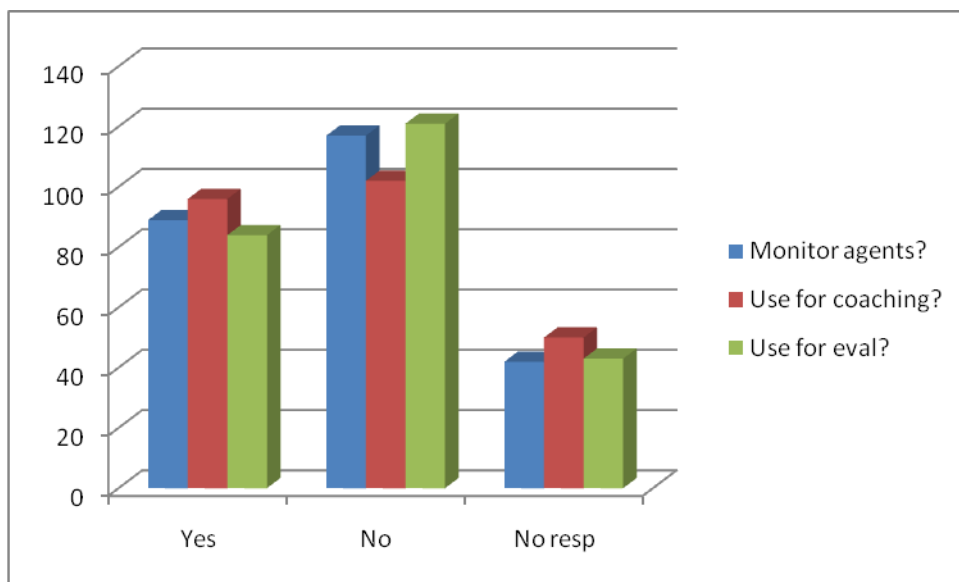


Figure 8. Repondents using monitoring at all, for coaching, and for performance evaluation.

Why do so few people use live session monitoring, particularly when remote support tools facilitate this more than ever? Here are some possible reasons:

**Labor costs.** For one thing, session monitoring is labor intensive: Each minute of session monitoring takes up at least one minute of a supervisor's time. Even just sampling each agent's work represents a very large commitment of time, particularly when compared with metrics that can provide a snapshot of performance across hundreds of transactions.

**Measurement issues.** An agent's average handle time, first-call resolution rate, and customer satisfaction levels are quantitative measures that are available at the push of a button. But how do you measure outcomes from a live monitoring session? Session monitoring often requires an investment of time and effort to quantify the results.

**Morale issues.** Done well, remote monitoring and coaching can serve as a source of personal growth and development for agents. Done poorly, within a context of "catching" agents surreptitiously and penalizing them, it can represent a broader atmosphere of mistrust that can affect morale and turnover.

Holding up issues like these against the survey data, it makes sense to consider session monitoring in the context of your entire support operation – particularly in terms of factors such as time, performance measurement strategy, and above all the morale and buy-in of your agents. For example, periodic monitoring by peer coaches that doesn't "penalize" agents may ultimately create better performance outcomes than environments where the boss is always possibly peeking over an agent's shoulder. Similarly, tools such as silent monitoring can potentially provide visibility without the drawbacks of formal agent monitoring schemes, if implemented in a way that is clear and transparent to all.

So how are today's agents evaluated? According to the survey results, in large part by what the boss, the customers, and the numbers think. Nearly two-thirds of respondents use performance metrics, supervisor feedback, and customer feedback, with session monitoring and 360-degree peer evaluation each being used by less than 20% of respondents. On a similar front, only 20-25% of respondents archive transaction logs or session recordings for training purposes.

What tools do you use for performance evaluation? (Choose all that apply)

Answer	0%	100%	Number of Response(s)	Response Ratio
Performance metrics			113	57.6 %
Supervisor feedback			136	69.3 %
Customer feedback			124	63.2 %
Silent session monitoring			38	19.3 %
360 (peer) evaluations			35	17.8 %
Other			15	7.6 %
<b>Totals</b>			<b>196</b>	<b>100%</b>

Figure 9. Tools used for agent performance evaluation.

### Remote Support Is Here to Stay

One of the clearest findings from this survey is that just pushing information over the phone or via chat between support agents and customers is going the way of the dinosaur. Remote support capabilities, where agents have the ability to interact using the computing environments of customers and each other, have become ubiquitous in customer contact operations. Aided by lowering price points and per-seat purchasing options, these tools have become affordable and scalable for nearly any support operation.

Nearly 70% of respondents currently use a remote support solution, and barely 20% state that they do not.

Do you use remote support capabilities?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			167	67.3 %
No			53	21.3 %
No Response(s)			28	11.2 %
<b>Totals</b>			<b>248</b>	<b>100%</b>

Figure 10. Respondents using remote support capabilities.

For those who use remote support solutions, the "killer app" is clearly the ability to remotely access and control customer screens, with over 80% of respondents using this feature. This capability is a game-changing productivity tool compared with lobbing information back and forth over a telephone or chat screen and has clearly reached a point where it makes economic as well as productivity sense for many support centers.

Diagnostic and communications tools such as chat, file transfer, remote diagnostics, and rebooting represent the next block of tools used by approximately 25-40% of respondents. Conversely, escalation and educational tools such as multi-agent collaboration and white boards are only employed by a minority of remote support users.

If yes, which of these remote support features do you use? (check all that apply)

Answer	0%	100%	Number of Response(s)	Response Ratio
Remote access and control			142	82.0 %
Multi-agent collaboration			38	21.9 %
White board			22	12.7 %
File transfer			66	38.1 %
Live chat			68	39.3 %
Remote diagnostics			65	37.5 %
Reboot/Reconnect			43	24.8 %
<b>Totals</b>			<b>173</b>	<b>100%</b>

Figure 11. Remote support features used.

On this latter point, 35.8% of respondents noted that their remote support solution enabled live collaboration between agents and managers during a live support session, rating its importance as 3.1 on a scale of 1 to 5.

*These results corroborate that remote support's key value proposition lies in remote access capabilities between agents and customers, with live escalation, collaboration and training remaining an open issue for the future for many support operations.*

## ***The Biggest Customer Support Issue? Well, People ...***

As part of this survey, we asked respondents to list what their most challenging customer situations were. A few of them involved technical issues like password resets or remote support. One blissfully successful support manager even reported that their firm had \*no\* challenging customer situations. But the vast majority of these worst-case scenarios would make fodder for psychologists, not just support technicians. Here is a sample:

### **1. This thing on your desk is called a c-o-m-p-u-t-e-r**

*"Complete lack of knowledge of even the most basic foundational knowledge needed to do their job."*

*"A customer who understands very little of the technology involved in their computer and communications device."*

*"Customer's inability to explain what they did to generate the error, or what they did in an attempt to fix the error, before they called for support."*

*"When a customer has to download/save files and they don't know how to save a file to a directory and find it later."*

*"Clients having low or no computer literacy."*

### **2. Pilot error**

*"Telling a user that they were misspelling their username and them not believing me."*

*"An employee repeatedly calls about voice messages being delayed. After researching logs, I determine that the person is not logging on to retrieve the messages. The person is being reprimanded and is adamant about the logs being wrong."*

*"Clients who insist on having the software do something not within its normal functionality."*

*"Those who do not want to follow direction ... or even worse break something ... then we have those whom you are better off shadowing and taking over for, as following directions is just too challenging for them."*

*"When a client has not gone through training and thinks they know how to do things."*

### **3. Don't you know who I am?**

*"We have one or two customers who are very demanding and will only talk to a manager. They frequently file unsubstantiated complaints and/or appeals."*

*"Customer not accepting the agreed service level."*

*"Many senior managers do not believe that customer support is needed as we service a captive market with no competition."*

### **4. I am not a happy person**

*"An angry customer who is not receiving the service he expects. He will not calm down; he just wants to let the world know that he is not happy and that he can cause problems. So I take over for my agent and soothe his ego until I can get to his issue and solve it."*

*"A dominant, aggressive customer."*

*"Dealing with angry students who feel the technology is not working the way they expect it to."*

## **Conclusion**

This survey explored how well support teams do their job of making customers happy, what kinds of people issues they experience, and what tools help them do their jobs best. The big picture offers reasons for optimism : reported customer satisfaction levels are good overall, as well as measures of staff confidence and employee-management relationships.

The survey results clarify what factors help support teams deliver effective service: the right kinds of training, learning good communications skills, and access to remote support and problem-solving tools. On the latter front, technology for remote access to client computer systems has become ubiquitous, indicating a strong ROI and justification for using these tools in support operations of all sizes.

At the same time, there is room for improvement in the human side of technical support, as well as more consistent measurement of its effectiveness. The survey indicates that this process of measurement has become increasingly automated and will continue to do so in the future. This groundbreaking research not only serves as a benchmark, but as a baseline: its data will tell us in years to come how we are doing with the human dimension of customer support and, above all, how well we deliver on the implied promises of a support center.

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Supportindustry.com provides senior-level service and support professionals with direct access to information on customer support, including enterprise strategies, people issues, technology, trends and research. This data enables support professionals to benchmark and improve their customer support operation. Members are responsible for the help desk and customer support operation of their company. More information can be found at <http://www.supportindustry.com>.

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