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The Biggest Paradigm Shift in the History of Customer Support and Service:

How Support Behaviors are Changing for Mobile and Social Media Environments

- SupportIndustry.com Research Results -

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Executive Summary

Supportindustry.com and Citrix Online sponsored a survey in late 2010 to assess the impact of mobile and social media environments on support, with over 200 responses.

To ensure a good response, this was designed as a short, 15-question survey focusing on these support issues, without additional demographic or industry information. Given the survey sample, the results represented a broad cross-section of the support industry.

Key points from the survey results include the following:

- Over half of respondents either have a support strategy in place for mobile environments, or plan to implement one over the next 12 months.

- Mobile support environments are growing rapidly, with the number of respondents supporting these poised to double by late 2011.

- Increasing use of mobile devices, a more distributed customer base, and resource pressures all serve as nearly equal factors in this growth, as well as Internet compatibility across mobile devices.

- 34% of respondents either support or plan to implement social media support channels, with another 34% currently undecided.

- Facebook and Twitter are the most common channels for social media support, with LinkedIn a distant third.

- The use of web chat as a live support channel will more than double over the next year, to include over half of all survey respondents.

Survey Background

Just a few short years ago, the idea of a dedicated mobile support strategy seemed ludicrous for most people. Even the best smartphones were often crippled by low-resolution displays, limited functionality, and incompatible Web browsers. Users often struggled with all but the most basic document editing and e-commerce tasks, and many saw these devices as good for little more than checking e-mail and keeping their calendars up to date.

Today, the line between mobile devices and computers is blurring constantly. Newer smartphones have substantial memory and storage, greatly improved processing power, and increasingly serviceable Internet and applications capabilities. And with the advent of small, portable tablet devices such as the iPad, the capability gap between a mobile device and a laptop computer is smaller than ever.

The use in social media in support follows a very similar storyline. Chances are that a couple of years ago real support meant contacting a call center or a dedicated web site; Facebook or Twitter were websites your teenage children used, and getting support through social media seemed about as logical as embedding it in your favorite video game.

What a difference two years makes: with 500 million users, Facebook is now technically the third largest country in the world, Twitter generates over 65 million "tweets" per day, and adult and corporations are now leading the social media charge. In the process, they have not only become another important channel for connecting people with the products and services they use: they have moved support from a private conversation to a public one, whose impact can spread virally through an entire customer base.

Both of these trends are leading us toward what may become one of the biggest paradigm shifts in the history of customer support – a move away from serving people sitting at desks, and toward a mobile and socially-linked world of information on demand. The results of this survey reflect how mobile support environments and social media have quickly become very real issues for service providers in 2010, and how these trends will affect support in the near future.

Support for Mobile Environments: a 2010 Snapshot

Perhaps the single biggest takeaway from this survey is that as of 2010, more than half the support operations surveyed either now have or are planning a strategy for providing support in a mobile environment. Nearly a quarter of respondents (23.3%) already have one in operation, while another 30.9% are currently working on such a strategy. Conversely, 44.7% do not yet have a mobile strategy in place. Between the large number of people planning to implement mobile support and the relatively minimal attention given to it in previous years, this represents a very strong trend.

Do you have a strategy in place for mobile or smartphone-based support?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes, we currently have a mobile strategy in place			49	23.3 %
No, we do not have a mobile strategy in place			94	44.7 %
We are currently working on our mobile strategy			65	30.9 %
No Response(s)			2	<1 %
		Totals	210	100%

These figures reflect a concomitant rise in demand for support via mobile devices. Over a quarter of respondents (28.4%) report that 10% or more of their customer seek support via mobile channels, with a significant minority of 4.7% reporting that over half of their support comes through this channel. Moreover, over 60% of respondents expect the level of mobile support to increase over time, with another 31.9% still unsure. Combined with the growth of smartphone technology itself, these responses point to a substantial and growing support channel in the mobile arena.

What percentage of your customers seek support via a mobile device or smartphone?

Answer	0%	100%	Number of Response(s)	Response Ratio
1 - 10%			69	32.8 %
10 - 20%			19	9.0 %
20 - 30%			19	9.0 %
30 - 40%			8	3.8 %
40 - 50%			4	1.9 %
over 50%			10	4.7 %
Don't know			81	38.5 %
No Response(s)			0	0.0 %
		Totals	**210**	**100%**

Do you expect the amount of mobile or smartphone-based support to change in the next 12 months?

Answer	0%	100%	Number of Response(s)	Response Ratio
We expect the demand to increase			129	61.4 %
We expect the demand to decrease			13	6.1 %
Don't know/Not sure			67	31.9 %
No Response(s)			1	<1 %
		Totals	**210**	**100%**

A Changing Support Environment

When asked whether moves toward new support channels were driven by distributed staff and customers, increased mobile use, budget pressures, or reduced staffing, the response from this survey was "yes!" Each of these factors was ranked almost equally in a weighted analysis of responses: as the figure shows, each factor had a weighted average ranking that hovered very close to the median value of 3.0 on a scale of 1 (most important) to 5 (least important), within a very tight range from 2.8 to 3.1.

Please rank the following factors by influence on changing your support behavior (1 being the most important factor, 5 being the least):

1 = Most

Answer	1	2	3	4	5	Number of Response(s)	Ranking Score*
Greater distributed staff						206	3.1
Greater distributed customers						206	3.0
Increased mobile support (i.e., more WiFi access, smartphones, tablets, etc.)						206	2.8
Less budget						206	3.0
Fewer internal resources						206	3.1

*The Ranking Score is the weighted average calculated by dividing the sum of all weighted rankings by the number of total responses.

At the same time, there is a measurable split among respondents as to the most and least important of these factors. A clear plurality (50 respondents, versus 23 to 32 for other factors) ranked increased mobile support as the single biggest driver of change, while a similar number (46) viewed the level of internal resources as being the least important factor. This reflects a broader view that new support channels reflect a technological and social revolution, rather than just a budgetary one.

Ratings of most and least important factors for changing support behaviors
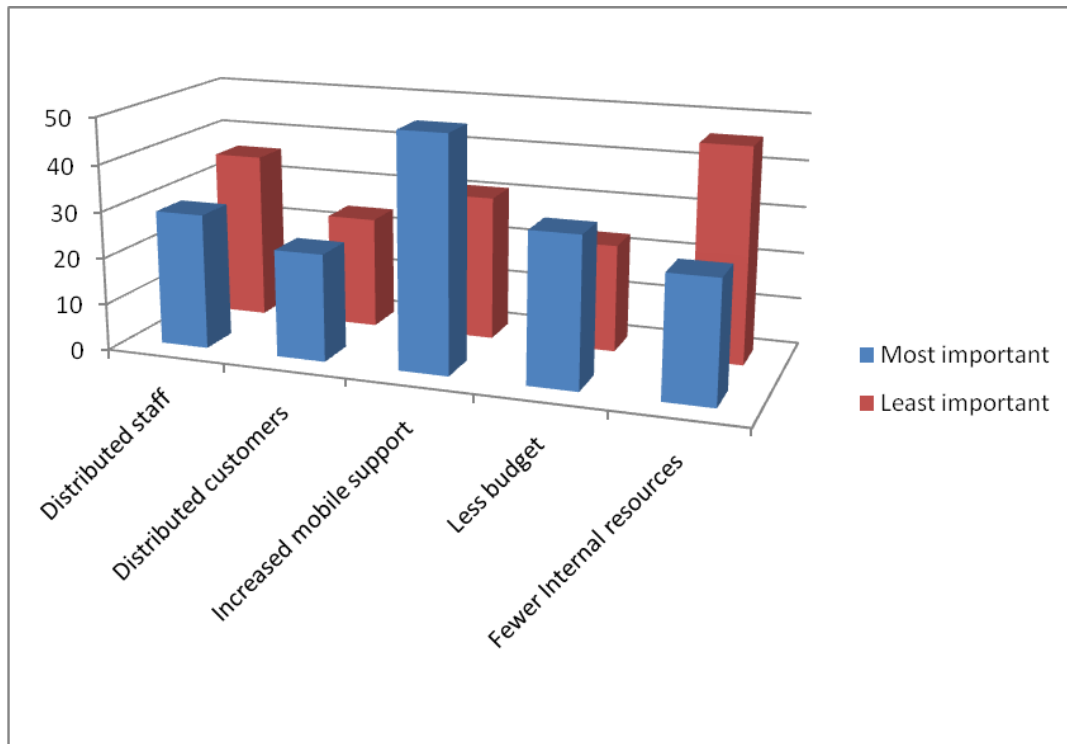
The Question of Compatibility

As smartphones continue to add more interactive capabilities and processing power – and as tablet-based devices start to blur the distinction between mobile platforms and the desktop – there is a legitimate question as to whether mobile devices will even be considered a separate support channel in the future.

Today many smartphones can technically claim to be full-fledged computing devices that can talk to the Internet and enable the use of web-based applications. At the same time, it is still clearly a much richer conversation on some devices versus others. While capabilities have improved a great deal in recent years, it still would not be prudent for support providers to assume without testing that their support tools function appropriately in a mobile environment.

According to the survey results, support environments currently break down into three roughly equal constituencies: those who claim their web-based support interface operates correctly on most major mobile devices (27.1%), those who feel it works on some but not all mobile devices (31.9%), and those who acknowledge that their web support capabilities do not work correctly on these devices (34.2%). Put another way, between a third and a half or more of users now enjoy mobile support by virtue of applications compatibility with their devices, and this number is bound to grow in the future.

Does your current web-based support interface operate correctly on major mobile devices?

Answer	0%	100%	Number of Response(s)	Response Ratio
Our web-based support interface operates correctly on MOST major mobile devices			57	27.1 %
Our web-based support interface operates correctly on SOME major mobile devices			67	31.9 %
Our web-based support interface DOES NOT operate correctly on major mobile devices			72	34.2 %
No Response(s)			14	6.6 %
		Totals	210	100%

Some support tools may follow the lead of sites like Amazon.com or Facebook, by having a specific user interface that is optimized for mobile devices. Others may lean on the compatibility of smartphones to allow the use of their standard web support interface. It is telling that nearly three-quarters of survey respondents (73.8%) ultimately view mobile support as an extension of their traditional web-based support channels, while 25.2% see it as a separate channel, reflecting at least in part a mobile support strategy that presumes that smartphones will continue to get smarter.

While others are deferring the issue of mobile support for now, for reasons that may range from technology issues to a lack of infrastructure for testing and maintaining support compatibility, the results of this survey point to a world of increased mobile support. This growth is being fueled by technology as well as customer demand, and is a testament to how much computing power now fits in the pockets of consumers and businesses alike.

Web Chat: The Future of Live Support?

As support channels become more distributed, web chat capabilities can represent an important link for live support. Unlike telephone support, which is a dedicated one-to-one transaction, agents can often manage multiple chat sessions simultaneously: for example, Citrix's GoToAssist product can support up to eight chat sessions in parallel in separate tabbed windows. Moreover, agent chat capabilities can be easily embedded in web-based support environments.

Over half of the people we surveyed either use or plan to use web chat as a support channel: 24.7% of respondents currently offer web chat capabilities, 7.6% are currently working to implement them, and an additional 23.3% plan to implement web chat sometime over the next 12 months. With web chat capabilities poised to more than double over the next year, look for this to become a cornerstone of live support in the future.

Curiously, although agent productivity is a key selling point for web chat capabilities, those planning to implement it view its benefits in more customer-centric terms – compared with decreased support handle times (12% of respondents), roughly twice as many people listed increased customer satisfaction (27.4%) and first contact resolution (23%) as key reasons for implementation.

If you have web chat, does the feature help in the following ways: (check all that apply)

Answer	0%	100%	Number of Response(s)	Response Ratio
Decreases support handle time for agent			22	12.0 %
Increases customer satisfaction			50	27.4 %
Increase first contact resolution			42	23.0 %
We do not have a web chat support channel			121	66.4 %
		Totals	182	100%

Support in Social Media Environments

Social media has become one of the hottest trends among support vendors, many of whom are now planning capabilities for integrating support environments with tools such as Facebook and Twitter. In the 2010 Service and Support Metrics Survey, also sponsored by Supportindustry.com and Citrix GoToAssist, there was substantial year-over-year growth in interest for providing support through social networks, even though customer usage levels are still at the early-adopter stage. This, in turn, is fueling an environment where support is more public and visible than ever for most organizations.

This survey shows a cautious but definite trend toward using social networks as a support channel. Over a third of respondents either currently offer support through such channels, or plan to offer it over the next 12 months. Another third have no plans in the near term, while the remaining third are unsure of their plans at this point.

Current status of social media support among respondents
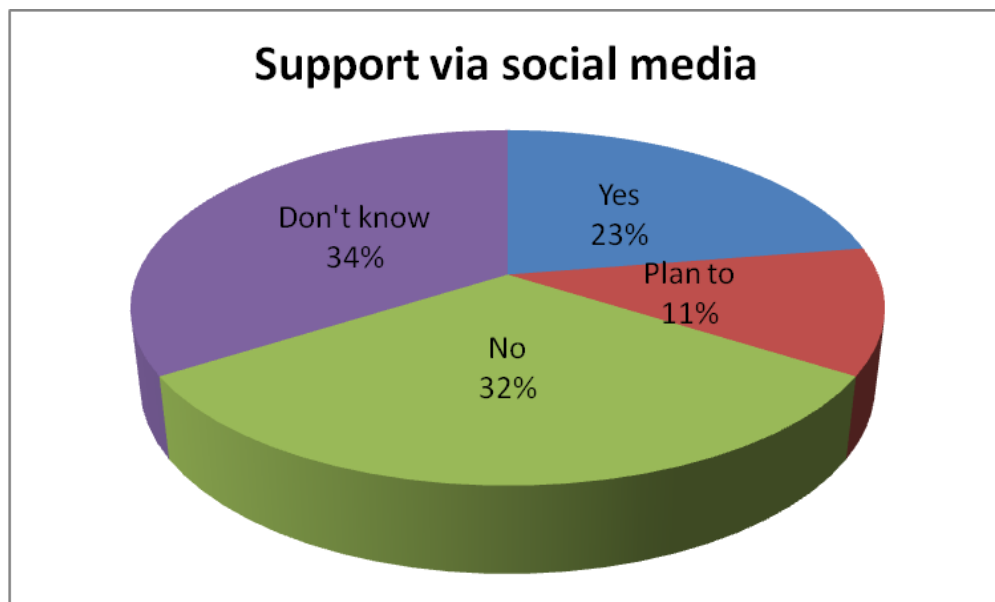
When asked to rank social media channels for support purposes, Facebook and Twitter were chosen by roughly a quarter of respondents, with LinkedIn and other channels each being specified by between 10 and 13% of respondents. (Note that since this question allowed multiple selections, total responses exceed the number of respondents.)

Most commonly supported social networks
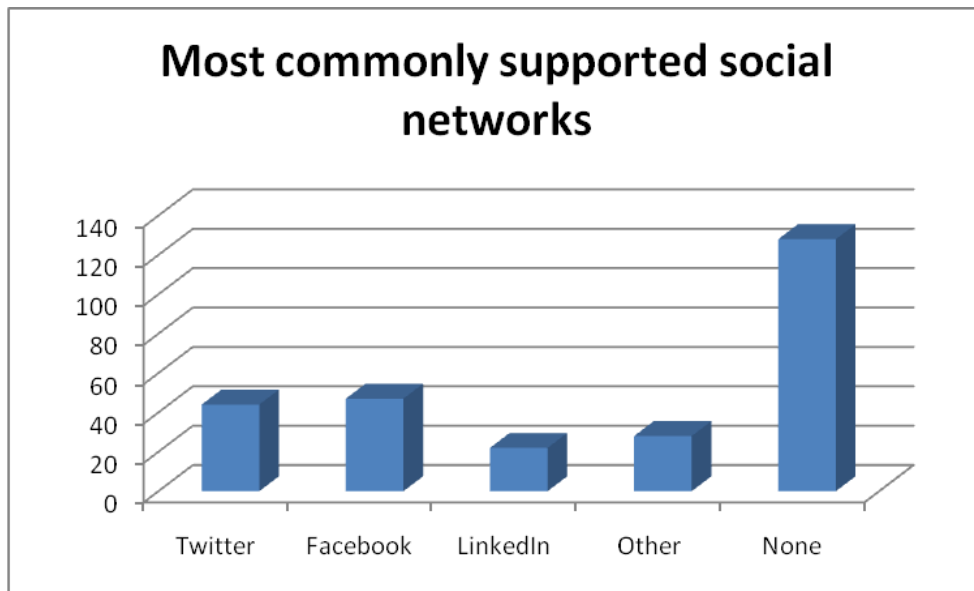
In many ways, this distribution reflects the nature of these channels.

- Facebook is an environment where people often "live" for substantial periods of time: for example, a 2009 Nielsen Online study showed that an average person spends 70 hours per year on Facebook, and as we move toward younger consumers, CyberSentinal did a study the same year showing that teenagers spend nearly three and a half hours a day chatting with friends online.[1]

- As a microblogging platform, Twitter is a constant feed of status updates, with the result that people are often "plugged in" to it on a regular basis as well. Moreover, it has recently had several celebrated incidents where customers received service on their issues in response to a "tweet" when other channels had failed.

- LinkedIn is primarily a purpose-driven business networking environment, where people keep in touch with colleagues for career purposes. At the same time, it has features such as Q&A and discussion boards where people may seek support assistance.

- Proprietary social networking environments are often easy to set up, thanks to tools such as discussion boards and chat rooms, but their effectiveness often requires a critical mass of customers to be using them on a regular basis. As a result, large vendors such as Dell, Apple, and Microsoft often fare best at tapping "the wisdom of crowds" as a dedicated support channel.

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[1] Barnett, Emma, "Facebook users spend three solid days a year on the site," The Telegraph (UK), Nov. 5, 2009; Axon, Samuel, "Study: Teens spend an average of 31 hours per week online," Obsessable.com, Feb. 11, 2009.

These trends reflect the need for organizations to provide support where their customers are. For example, customer-facing retail firms are increasingly looking into providing support via their Facebook pages, while internal corporate support may be functioning in an environment where employees are forbidden to use social networking tools. Likewise, the Twitter-verse increasingly represents an environment where people are seeking service on demand.

One key difference between social media and other support channels is that is very public and visible, and therefore can represent a key aspect of how organizations brand themselves and their service quality. These survey results reflect an environment where both organizations and customers themselves are still adapting to this new service paradigm, which continues to grow in size.

Are Mobile and Social Media Support Linked?

Social media and mobile devices are closely tied together in popular culture: for example, interfaces for tools such as Facebook are highly optimized to work on smartphones, and Twitter's ubiquitous 140-character message length limit is patterned after the boundaries of an SMS text message. So do support providers view them both as part of a "package deal"?

According to the survey results, the answer would appear to be yes. Respondents who have no plans for mobile support over the next 12 months are nearly 40% more likely to have no plans for social media support, compared with respondents who have or are planning mobile support. Conversely, respondents with no plans for social media support are more than twice as likely to not be planning mobile support over the next year.

Some of these responses may be due to infrastructure: for example, corporations who only provide internal support to desktop users, or environments where social media usage is restricted. Others may be waiting before making a commitment to either technology, to see where the wave is heading within their own customer base. Still others probably break down among the normal patterns of early versus late adopters of new technology. In any event, there clearly appears to be a great deal of cross-pollination between mobile usage and social media technology.

Plans for social media support versus mobile support
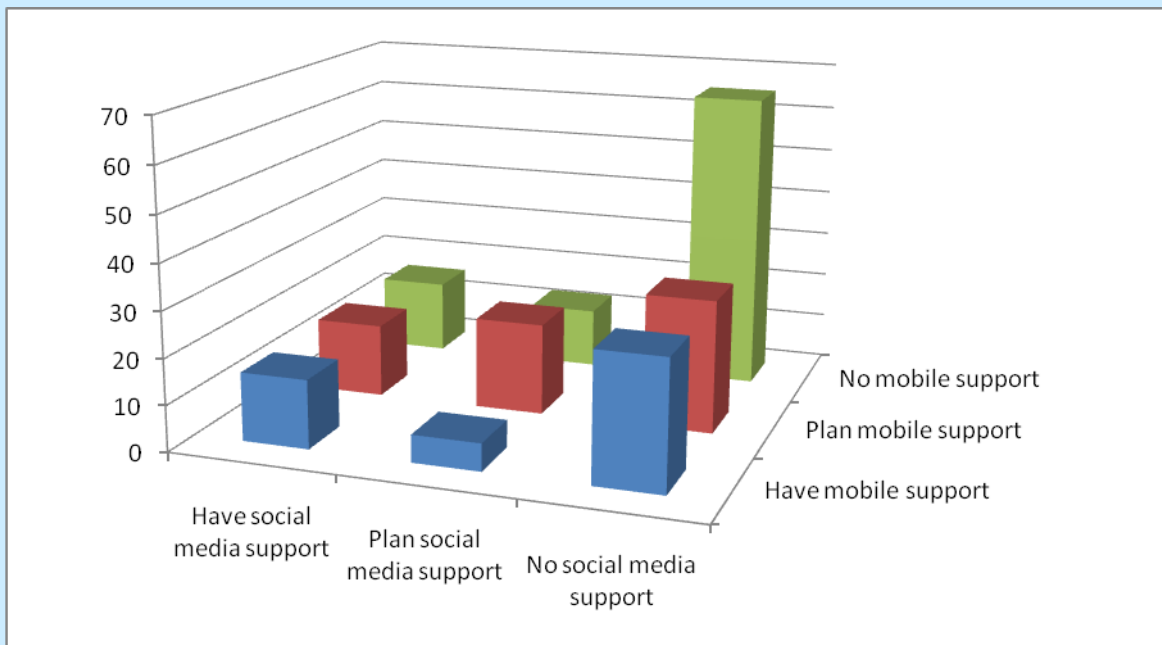
Conclusion

This survey was designed to quantify trends that have been the subject of much discussion throughout 2010: the use of mobile devices, social media, and web chat as support channels. The responses to this survey make it clear that these technologies are not only real and tangible, but in fact experiencing explosive growth. This year represents a point in history where a majority of support operations may soon offer many of these capabilities as part of their support channel mix.

At the same time, these numbers also reflect that even hot new technologies are ultimately demand-driven. The strong growth in mobile support channels tracks an equally substantial rise in both the usage and technical sophistication of mobile devices and smartphones. Conversely, the weaker growth rates of social media support – arguably the flashiest topic for the support industry in 2010 – reflect a customer base that is still at the early adopter stage, a phenomena explored in greater detail in the *2010 Service and Support Metrics Survey* sponsored earlier this year by Supportindustry.com and Citrix GoToAssist.

Over the year to come, it will be interesting to see how the implementation levels of these capabilities develop, as well as the degree to which customers use and adopt them. It will also be interesting to learn more about the strengths and weaknesses of these new support channels as they continue to evolve. We are clearly entering a new era in customer support, one that is driven by the more mobile, distributed, and socially-linked environment that we now live in.

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