

2016 TSIA Member Technology Spending Report Support Services

2016 Technology Adoption and Spending Report:
Support Services

Adoption, Satisfaction, and Planned Spending for
Support Services Technology

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EXECUTIVE SUMMARY

TSIA's 11th annual global technology survey is complete, documenting member adoption, satisfaction, and planned spending across 42 categories of technology used by customer success, education services, expand selling, field services, managed services, professional services, service revenue generation, and support services. This report will highlight the data for support services. Several new categories were added for support services this year, including breaking out the former multichannel category to track details on web chat, customer self-service portals, email response management, and call me/chat with me now. Satisfaction with technology was low again this year; the highest average score from support services respondents was 3.9 for email response management and web chat solutions, using a 5-point satisfaction scale (1 being very unsatisfied; 5 being very satisfied), and multiple categories saw averages below 3.5.

Planned spending is high for 2016-2017, with double-digit percentages of members planning additional purchases in every category covered by the survey. Top spending categories include self-service portals and knowledge/content management. Service and support organizations considering additional investments in technology and services should identify areas in which peers have already adopted solutions in order to avoid losing a competitive edge due to lack of technical sophistication.

Technology Adoption

The categories tracked by the 2016 TSIA Member Technology Survey and used by support services are listed in *Table 1* in alphabetic order.

Table 1: 2016 Technology Categories for Support Services

Category	Description
Call Me/Chat with Me Now	Call me/chat with me now technology plugs into your unified communications/telephony platform to allow customers to request an immediate call or chat via their PC or mobile device. The control can be imbedded in a website, such as e-commerce or self-service, or added to a mobile device or mobile application to streamline access to support. Similarly, customers waiting on hold for a live phone agent may be provided with a "chat now" option to bypass the phone hold queue if desired. A popular example is the "Mayday" feature offered by Amazon on their Fire tablets. This category is applicable to the support services discipline.

Category	Description
Communities/Enterprise Collaboration	Online customer communities and enterprise collaboration for employees are designed to enable peer-to-peer support and share information internally and externally. This includes discussion forums, expertise tracking, reputation models, moderation, etc. The communities/collaboration category is applicable to all disciplines.
Consumption Monitoring/Analytics	Consumption monitoring/analytics are tools used to measure and monitor customer consumption of technology, gauging how quickly customers are adopting new tools, common process flows, top-used features, number of users, and length of session time. Consumption monitoring is a key piece of shifting toward outcome-based services. The consumption monitoring/analytics category is applicable to all disciplines.
Contract/Entitlement Management	Contract/entitlement management is a suite of tools that tracks which customers have current warranties, service contracts, or maintenance agreements with your company. This includes the ability to easily check if a customer has a current contract in place, i.e., that they are entitled to service, as well as ensuring you are meeting response/resolution time commitments. The contract management category is applicable to the field services, managed services, customer success, support services, service revenue generation, and expand selling disciplines.
CRM/Incident Management	Enterprise CRM is an enterprise deployment of CRM (customer relationship management) across sales, marketing, and service. This platform tracks leads, opportunities, campaigns, accounts, and contact history. Incident management, also known as case management, service requests (SRs), or trouble tickets, is used to track an occurrence of a customer question or problem through to resolution. The enterprise CRM/incident management category is applicable to all service disciplines.
Customer Experience Analytics	Customer experience analytics, also known as customer journey analytics, includes survey and reporting tools used to track transactional, periodic, and project customer satisfaction, Net Promoter Scores, and Customer Effort Scores. In addition to customer survey tools, customer experience analytics includes quality monitoring for agent performance, as well as voice and text analysis of assisted and unassisted support and social interactions, and any marketing, sales, or service interactions. The customer experience analytics category is applicable to all service disciplines.

Category	Description
Email Response Management	Email response management solutions are used to automate the responses to customer emails. Auto-acknowledge automatically replies with basic information such as average response times, and may include an incident or tracking number. Auto-response can intelligently respond with an answer based on text analysis of the incoming response. This category is applicable to the support services and field services disciplines.
Gamification	Gamification is the application of the typical elements of game playing (e.g., point scoring, competition with others, rules of play) to other areas of activity to encourage engagement with a product or service. Gaming activity often includes earning badges that establish a level of ability or competence. Gamification tools include the capability to provide social collaboration, feedback, achievement profiles, people analytics, missions and challenges, and badges as evidence of accomplishment. The gamification category is applicable to the support services and education services disciplines.
Intelligent/Enterprise Search	This linguistics-based search platform includes analytics for sophisticated reporting. It also allows content in any format or location to be indexed and searched. The intelligent search category is applicable to education services, field services, professional services, and support services.
Knowledge/Content Management	Knowledge management, or content management, technology is used to capture, maintain, and reuse knowledge. The knowledge management category is applicable to education services, field services, professional services, and support services.
Learning Content Development Systems	Learning content development systems, or LCDS, are used to create and maintain content for learning management, including tools for video creation and editing. This category also includes single-source authoring platforms, in-product performance support tools, and content development tools. The LCDS category is applicable to the education services and support services disciplines.

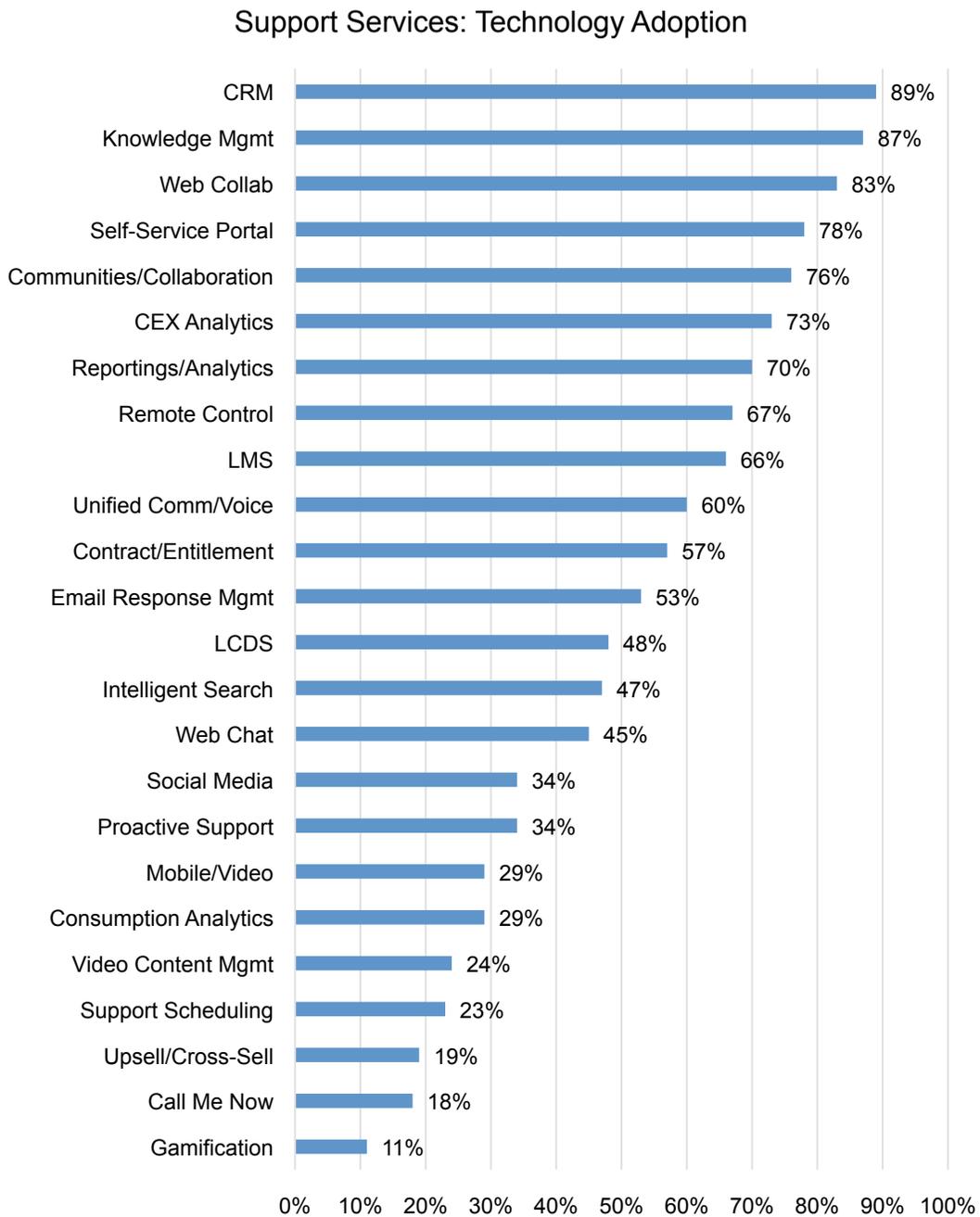
Category	Description
Learning Management Systems	Learning management systems, or LMS, are platforms for managing learning, including curricula, online learning content, and instructor-led courses (both in a physical and virtual classroom, or at a customer site), scheduling, registration, course tracking, completion tracking, and course accounting. Many LMSs also have e-commerce capability, enabling the usage of training credits. The LMS category is applicable to the education services, managed services, and support services disciplines.
Mobility/Video	Mobility and video in service are tools for improving productivity and accuracy by leveraging mobile and video technology. This includes tools to mobilize field service technicians, professional services consultants, and other service employees, giving them access to corporate content, collaboration, and workflow from anywhere, including video knowledge or training content. The mobility/video category is applicable to the education services, field services, managed services, professional services, and support services disciplines.
Proactive Support/ Intelligent Diagnostics	Proactive support and intelligent diagnostics is a category of tools used to remotely monitor customer equipment for error conditions, and may include auto-resolution or notification features. The proactive support category is applicable to the field services, managed services, and support services disciplines.
Remote Control	Remote control software allows support technicians to “take control” of a customer’s desktop, laptop, or mobile device to troubleshoot problems, check settings, or to walk a customer through a procedure or process. Remote control includes security features to capture sessions for audit purposes, as well as for management dashboards. The remote control category is applicable to the field services, support services, education services, and managed services disciplines.
Reporting/Analytic Platforms	Reporting/analytic platforms are analytic-based reporting platforms used to do sophisticated trend reports and create reporting portals, such as a services dashboard. The reporting platform category is applicable to all service disciplines.

Category	Description
Self-Service Portals	Self-service portals provide the infrastructure for a customer self-service site, typically including knowledge management capabilities, tools to navigate and find knowledge, as well as integration to CRM/incident management for customers to create and view incidents within the portal. The self-service portals category is applicable to the field services and support services disciplines.
Social Media/Social Service	Social media or social service is a set of emerging tools used to manage interactions with customers and employees via social channels such as Twitter, Facebook, and YouTube. The social media category is applicable to the support services discipline.
Support Scheduling Optimization	Support scheduling optimization is a suite of tools used to schedule support technicians and call center agents according to volume peaks and required skill sets, also known as workforce optimization. The support scheduling optimization category is applicable to the support services and managed services disciplines.
Unified Communication/Voice	A unified communication/voice platform is the infrastructure used to route inbound customer voice interactions via phone; typically includes skills-based routing, right channeling, voice menus (IVR), real-time volume management, etc. This category is applicable to the field services, managed services, and support services disciplines.
Upsell/Cross-Sell	Upsell and cross-sell technology is a set of tools that prompt support techs and call center agents with personalized offers to present to customers during an assisted support session. It can also track offer extensions and accepts. Upsell/cross-sell enables seamless selling during support interactions. These upsell and cross-sell technologies also assist renewal specialists and account managers with “expand selling” strategies with existing customers. The upsell/cross-sell category is applicable to the field services, managed services, customer success, support services, expand selling, and service revenue generation disciplines.
Video Content Management	Video content management systems manage, schedule, and/or automate video distribution to customers, tracking key metrics such as open rates, viewing time, etc. This technology helps companies manage their video library, identifying top-used content as well as unused content that may need updating or archiving. The video content management category is applicable to the customer success, support services, and education services disciplines.

Category	Description
Web Chat	Web chat is an increasingly popular customer interaction channel, allowing customers to request a chat session with a live agent while browsing a website. Other features include proactive chat (reaching out to customers with an offer to chat with an agent), common in e-commerce situations, and mobile chat, i.e., enabling chat via SMS text messaging using a mobile phone. The web chat category is applicable to the support services discipline.
Web Collaboration/ Desktop Sharing	Web collaboration/desktop sharing is a collection of web-based tools used to enable collaboration between employees and customers. This can include screen sharing, online meetings and training, and webcasts. The web collaboration category is applicable to all disciplines.

In *Figure 1*, the percent of support services members using each of these technologies is shown.

Figure 1: Support Services Technology Adoption



Source: 2016 TSIA Global Technology Survey.

Of the new categories added to the survey for 2016, several saw high levels of adoption. Web chat, used by 45% of companies, is rising in popularity with customers, particularly younger customers, and companies launching chat practices are finding the channel works well, even for complex B2B technology support. More than half of companies, 53%, have some sort of email response automation, either a specialist email response product, or a tight integration between Outlook and the CRM or incident management system. Remote control, the popular tool allowing agents to take control of a customer's desktop, laptop, or mobile device, was split out from the web collaboration category this year, and is in place in 67% of companies.

Of the returning categories, adoption levels were flat across a few areas TSIA anticipated adoption growth, including consumption analytics, used to measure the level of adoption of technology by customers. Consumption analytics remained at 29% adoption by support services, the same as in 2015. Social media tools, used to monitor social media conversations in Facebook, Twitter, or other social channels, was only used by 41% of survey respondents.

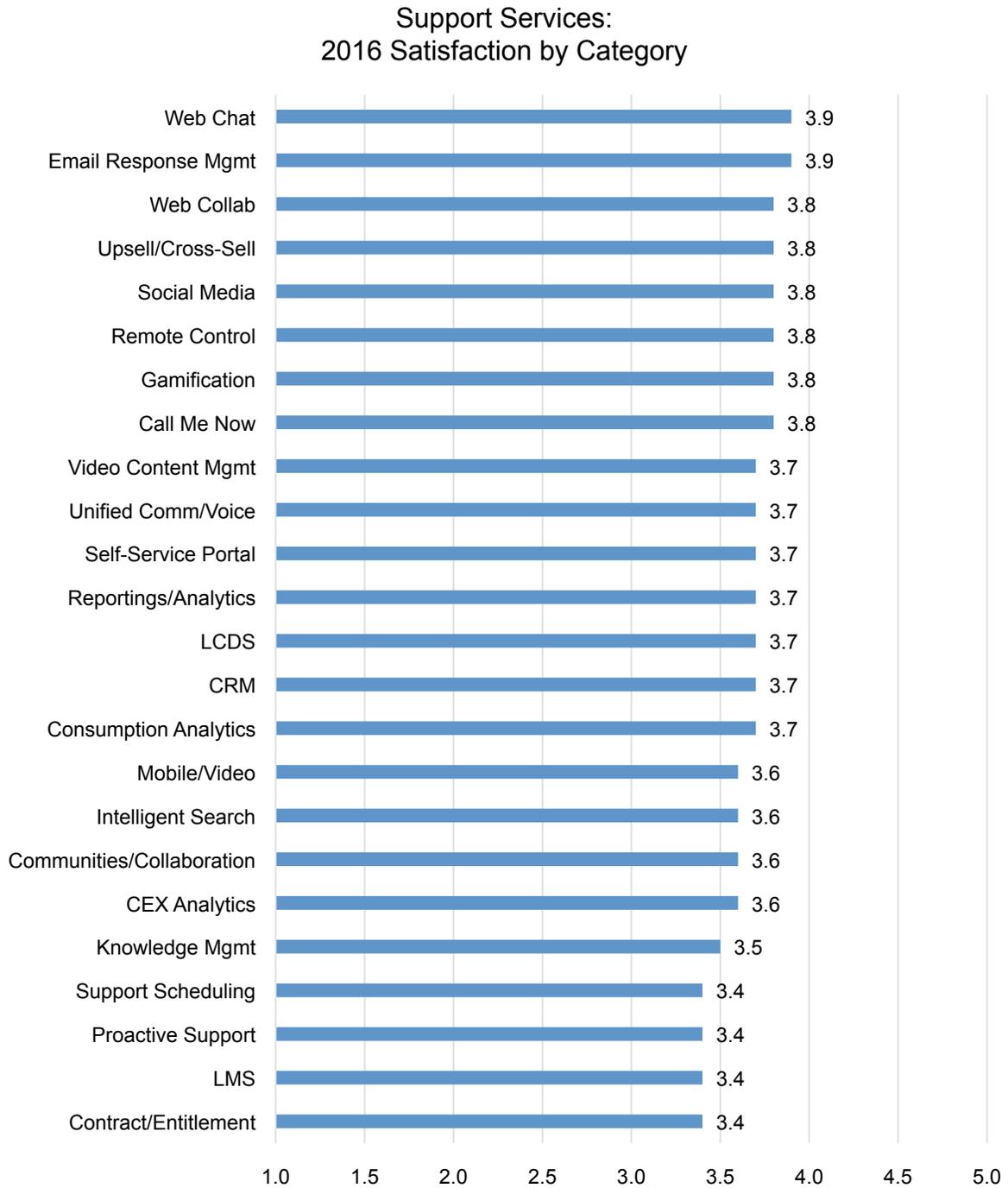
Emerging tools used by Pacesetters included upsell/cross-sell, adopted by 19% of respondents. The two categories with the lowest adoption by support services were both new to the 2016 survey: call me now, allowing customers to request a call or a chat to avoid waiting in queue, and gamification, which introduces gaming elements to boost employee productivity and ensure adherence to defined processes.

Satisfaction with Technology: Lower Than the Industry Average

According to the TSIA Benchmark, customer satisfaction with enterprise software averages 4.3 on a 5-point scale (with 1 representing very unsatisfied and 5 representing very satisfied). It is troubling, then, that the satisfaction scores from support services members for the categories covered in the TSIA Global Technology Survey range from a low of 3.4 to a high of 3.9—all categories are under the industry average of 4.3. While there are many excuses (service managers are tough customers, IT sometimes forces technology on business users, lack of user training), the fact remains that service technology is not meeting or exceeding customer expectations for average satisfaction scores to be so low.

The categories with the highest satisfaction were both tools for omnichannel, call me now and email response management, each receiving an average satisfaction score of 3.9. Categories with the lowest scores were contract and entitlement management, learning management systems, proactive support solutions, and support scheduling or workforce management, all receiving an average satisfaction score of 3.4. Satisfaction scores for all categories can be seen in *Figure 2*.

Figure 2: Member Satisfaction with Technology by Category



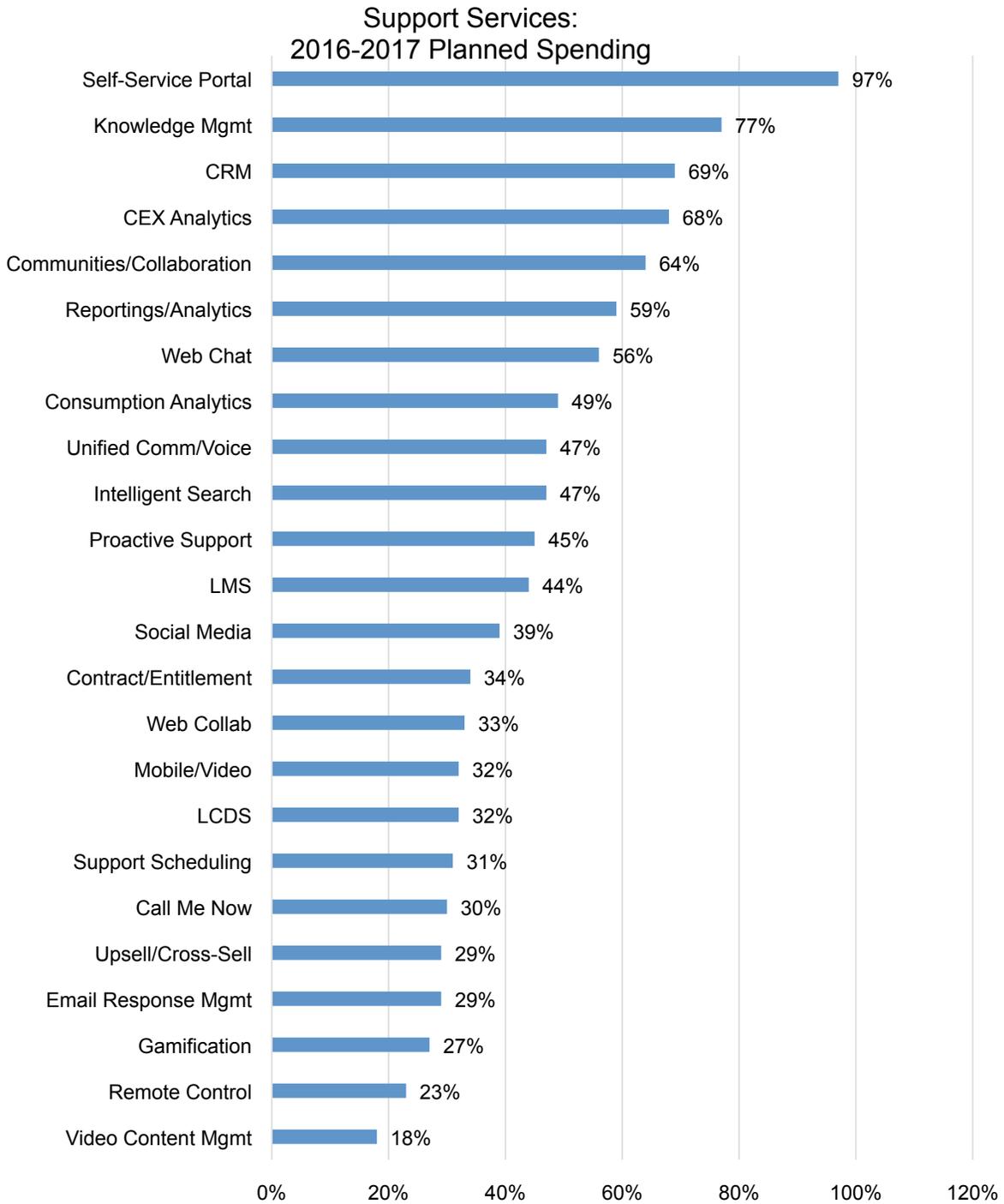
Source: 2016 Member Technology Survey.

TSIA Research does not publish satisfaction scores for individual vendors or products, but we do have the information available. If you are trying to narrow down your list of possible vendors, open an inquiry via your member services representative or the TSIA website, and we will provide the satisfaction scores for the products you are considering, if available.

Self-Service Portals and Knowledge Management Hot Spending Areas

The area of the TSIA Member Technology Survey that garners the most interest from members, partners, and the media is planned spending: in what areas do members have budget allocated for additional technology or services in the next 12 to 24 months? Planned spending has been high for the last five years as companies overhaul legacy systems and embrace new approaches to automation. Planned spending remains high again this year, with every category covered by the survey seeing planned spending by double-digit percentages of members. *Figure 3* shows the percentage of support services members with approved budget for purchases in each area in 2016-2017.

Figure 3: Planned Spending 2016-2017 by Category



Source: 2016 Member Technology Survey.

The areas with the highest planned spending for support services are:

- **Customer self-service portals.** Perhaps the biggest eye-opener of all the data in the 2016 Global Technology Survey is the massive planned spending for customer portals. Over half, 58%, of support services respondents said they were planning to purchase new or additional self-service tools in 2016, and an additional 39% are planning a purchase in 2017, leading to 97% of companies investing in self-service portals over the next two years. With TSIA data showing customers prefer self-service to assisted service, as well as data showing customers are unsatisfied with current self-service tools, hopefully this planned spending will improve access and usability for portals, as well as adding additional approaches to finding information to meet the needs of a wider array of customers.
- **Knowledge and content management.** Knowledge management has been a top spending area in years past, and it made the list again, with 77% of support services members planning further KM investments in 2016-2017. Several trends are driving this spending, including the expansion of mobile capabilities for content access, and introducing new self-service tools to aid customers in finding an answer without assistance. Also, there is growing interest in automating problem diagnostics and knowledge management to boost productivity without more product training.
- **CRM and incident management.** Another category in the top spending ranks again this year is customer relationship management (CRM) and incident management. Over the 11 years TSIA has conducted the Global Technology Survey, adoption of cloud CRM tools has been rising, and today more than two-thirds of TSIA members are using a cloud platform. There is also growing interest in ITIL-compliant incident management, a requirement for managed service operations, as well as for many highly technical support organizations who are closely aligned with IT. A total of 69% of support services respondents are planning additional investments in CRM in the next one to two years.
- **Customer experience (CES) analytics.** A total of 68% of support services respondents say they are planning an investment in customer experience analytics, also known as voice of the customer tools, in 2016-2017. This reflects the growing interest in tracking metrics impacting customer success, such as customer effort scores, as well as the complexity of harnessing the voice of the customer, as conversations are occurring in a larger number of channels, including social media.
- **Communities and collaboration.** Spending on customer communities and enterprise collaboration remains high for another year, with 64% of support services members planning an investment in communities in 2016-2017. Collaboration platforms—whether full-blown employee communities from vendors like Jive and Lithium, to more lightweight approaches such as Yammer or Salesforce Chatter—are becoming commonplace in technology firms,

helping employees in any location share information and reach out to peers or experts for help. And spending on customer communities continues, beefing up platforms to better enable access and use, including many projects to improve forum usability.

TSIA RECOMMENDS

With the increased complexity of today's products and the ever-growing number of customer interactions, clearly, investments in service and support technology are a primary avenue to meet and exceed customer expectations for service levels. But knowing where to start is difficult, with many different products offering a similar ROI story. When deciding where to make incremental investments, TSIA Research recommends:

- **Benchmark your technology footprint against other members.** How does your company compare to the adoption numbers shown in *Figure 1*? If you are missing technology that more than half of companies are currently using, maybe it is time to revisit how that technology can assist you in meeting your quality, optimization, and revenue-generation goals. Also, be sure to evaluate what best-of-breed technology offers today compared to homegrown systems, particularly for knowledgebase and self-service technology.
- **Beware the law of diminishing returns.** Service organizations with high-performing employees and strong, streamlined processes are unlikely to see the same ROI for a technology purchase as a poorer-performing company looking to standardize. Be realistic in expectation setting, and talk to the success organization of the vendor about typical outcomes. When trying to determine where to start with a series of projects, benchmarking is a good first step—identify the key metrics you would like to improve, and then target technology with a successful track record of impacting those metrics.
- **When in doubt, ask.** TSIA Research is here to help. Members can submit an inquiry on any topic and we will do our best to answer within 48 hours. To submit an inquiry, send an email to your membership development director or to support@tsia.com and one of our service representatives will respond to you as quickly as possible.