

Past, Present, & Future of



10 THINGS YOU NEED TO KNOW

Written by
Stephen Mann

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Corporate IT support is changing – from the most popular end-user access and communication channels used by employees, to employees’ expectations of IT support based on their consumer-world, personal-life, experiences.

Chat could, and should, be playing a big part in this evolution of IT support – from end-user happiness with chat, over other channels, to the opportunities available thanks to artificial intelligence (AI), chatbots, and virtual personal assistants.

Please read this paper to understand:

- The state of chat in 2017, including the relative adoption levels
- The growing popularity of chat thanks to consumerization
- The benefits of chat
- How to succeed with chat, via 15 chat-success tips
- The future of chat.

Along the way, this paper also offers up to ten key things that you need to know about chat for 2017 and beyond.



Chat in 2017

Chat use has come a long way since its origins – in both its social and business-world application; and, in some ways, it's now wrong to differentiate chat between these two worlds. As their respective use cases, and the line between personal and workplace IT, become blurred thanks to "consumerization."

THE ORIGINS OF CHAT

Chat – sometimes called "online chat" or "live chat" – is nothing new but the technology that enables it has greatly matured, and its use cases have been expanded upon since the first online chat system was introduced at the University of Illinois in 1973.

Its use in a non-work context has risen rapidly, from Short Message Service (SMS) – i.e. texting – in the 1980s, to newer social media networks such as Facebook, Twitter, WhatsApp, and Snapchat. However, chat in an internal-IT context, especially for IT support, has traditionally often been a communication-channel "partner" for remote support. One that doesn't require the end user to wait on the phone while the agent takes as long as is required to deliver against the end-user need.

Social-media-based chat capabilities, such as Facebook-like walls, have been added to some IT service management (ITSM) tools, as have pure live-chat capabilities – albeit with limited levels of success. But chat can offer so much more – with it able to play a part in speeding up diagnosis and resolution, reducing costs, and improving the end-user or customer experience.

THE CHAT STATUS QUO

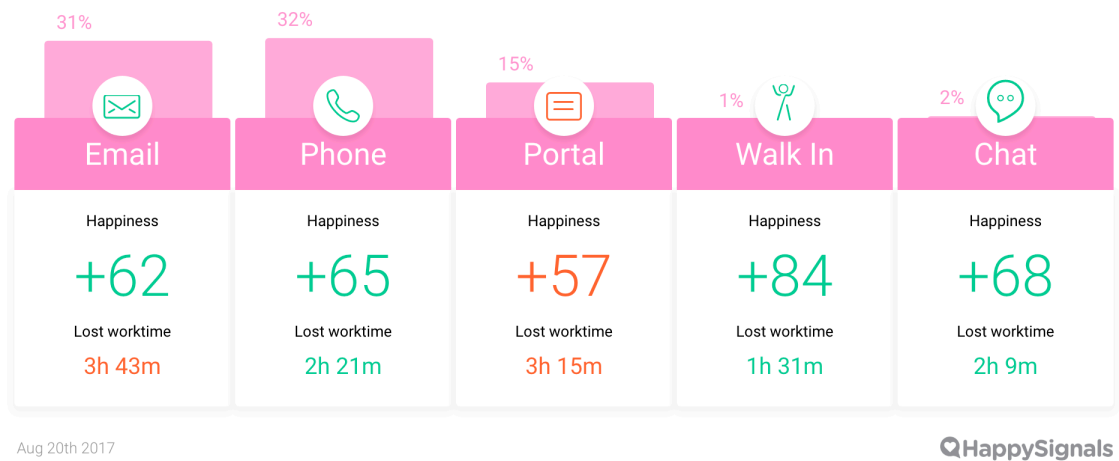
While some organizations now offer chat as an alternative access and communication channel for IT support, both chat availability and end-user adoption lag a long way behind telephone, email, and even self-service:

- In North America, the HDI 2016 Technical Support Practices & Salaries report¹ backs the relatively low level of chat availability – with chat offered by only 38% of support centers, although up from 32% in 2015 (the telephone channel is 87% and email is 85% in 2016).
- In the UK, the Service Desk Institute (SDI) 2015 Service Desk Benchmarking Report² has chat availability at just 21%. And even with 100% growth in the two years since the data was collected, it would still be at less than half the level of telephone and email channels (at 100% and 93% respectively).

Thus, chat is a minority IT support access and communication channel, in terms of availability.

However, it's even more of a minority channel (for contacting IT support) from an end-user adoption perspective, with Happy Signals³ – an employee experience management company – data, based on over 100,000 end-user feedbacks, showing that chat is the least used channel at 2% after the walk-up channel (see Diagram 1).

DIAGRAM 1: THE CHANNELS USED TO CONTACT IT SUPPORT



Source: Happy Signals

This data is returned too in the “Benefits of Chat” section, but for now consider this the first “thing you need to know”...



Chat is currently an underutilized IT support channel.

THE GROWING POPULARITY OF CHAT (THANKS TO CONSUMERIZATION)

Corporate IT service delivery and support can no longer be a law unto itself. Consumerization, initially in its early form of “the consumerization of IT,”⁴ has seen to this, with employees now increasingly expecting more from their corporate IT organizations. Comparing corporate IT to the services, and service experiences, they receive from the consumer-world companies they use.

However, consumerization is now about so much more than iPhones and tablets; it’s about so much more than the growing use of personal devices, apps, and cloud services in the workplace. Instead, consumerization is about the whole service experience, which includes not only the products used (or services consumed) but also the “service wrap.”

It’s ultimately the “consumerization of service” and it’s driving up employee expectations across the board, including the range and quality of IT-support access and communication channels – from telephone, to chat, to whatever the future of customer support holds.



2 Consumerization is ultimately bringing employee personal-life experiences of service, support, and the overall customer experience into the workplace; raising expectations of the corporate IT organization, including the offered access and communication channels.

Chat is currently used more in business-to-consumer (B2C) external customer support scenarios than it is for internal IT support. However, thanks to consumerization, expect this to change – and quickly. Expect consumer-world chat to fuel workplace demand for IT-support chat.

Looking to research into external customer support, i.e. employees' personal-life experiences, the 2017 Zendesk "The Multi-Channel Customer Care Report"⁵ shows the rising use of chat:

- Telephone is still the preferred contact channel, but chat is eating into its dominance – with 47% of respondents opting for it in 2016, compared with 54% in 2013
- Email is also in decline – falling from 48% to 40%
- Live chat has nearly doubled in popularity since 2013, growing from 18% to 32%.



Chat use, in a B2C context, is growing rapidly.

THE BENEFITS OF CHAT

The benefits of chat for IT support can be viewed through several lenses that impact both employees and the corporate service provider. For instance:

- Better meeting employees' preferred support needs through greater choice (of channels) and meeting their consumer-world-driven expectations
- Providing/receiving a superior service experience
- Quicker resolutions in terms of "involved," rather than elapsed, time – improving end-user productivity
- Chat can be a lower-cost IT support channel, with service desk agents able to work multiple tickets simultaneously – improving support-staff productivity
- Greater consistency of service and support thanks to the use of tailored "canned information and knowledge"
- Improved performance management and improvement – because everything said and done can be viewed in the chat transcript (and it's also easier for end users to express dissatisfaction when armed with a transcript)
- Chats saved to ITSM tool tickets make for better ticket data and the platform for knowledge capture and reuse.

However, the key benefits of chat for IT support are probably best showcased by returning to the Happy Signals data in Diagram 1:

- Chat has the highest employee "happiness" score, at +68, relative to all access and communication channels other than "walk up"
- End users lose less worktime with chat than with all other channels, again other than "walk up" – chat is considered even quicker than calling via telephone.

The latter strongly influences the former, but so does "choice." This is backed by the Zendesk Multi-Channel report, which can be used to understand what is, or will be, important to internal IT support on the back of consumerization:

“A friendly representative is most likely to be expected (66%) when contacting customer service. Followed by a choice of channels (63%), the quickest possible resolution (57%) and ‘to be put on hold for less than 10 minutes’ (52%).”



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Modern consumers expect choice of channel; and chat offers the best end-user experience – in terms of happiness and speed of resolution – of all remote IT-support channels.

Chat Success Tips

In aiming for chat success, it's worth comparing the chat scores to those for self-service – the “portal” data in Diagram 1. To understand that, while many IT organizations have already invested in self-service technology as part of their shift-left strategies (to improve customer experience, save money, or both), chat appears to be much easier to get right.

Whether this is due to mistakes made with the far-more-common self-service initiatives, or because chat is a less-complicated beast, there are a number of chat-success tips to bear in mind when providing, or improving, an IT-support chat capability.

PLANNING FOR CHAT

As with self-service, getting chat right is so much more than just implementing a new piece of technology. Instead it's about changing people's mindsets and behaviors, and – ultimately – their ways of working.

The bottom line is that if people don't know why they should, and how best to, use chat, and if the telephone channel is still considered easier to use, then why would people want to initially try, and then continue, to use chat?

So, consider the following five points when planning your new, or improved, chat capability:

1. **Think of chat from the end-user point of view** – with it being a capability and not a technology. While the technology needs to be easy to use, it's ultimately going to be about the whole service or customer experience. And not just the technology-based experience; people will play a big part too.
2. **Learn from the “people” mistakes of self-service** – in particular, apply organizational change management best practices from the outset. There's a need to remove the barriers to change, including the very-human fear of change – with organizational change management techniques employed related to involvement, communication, gaining buy-in, education, and potentially training.
3. **Chat, in this form, needs to be even more “human”** – the walk-up channel is loved because of both the immediacy of response and the human interaction. Text-based chat removes both the visual and aural aspects of the latter, so agents need to compensate for this loss in terms of focused friendliness, empathy, and rapport building. Agents also need to be very aware of how their (written) words can be misinterpreted by the reader.

4. **Chat needs great people** – firstly, to deliver on bullet one. But also, to be effective. Agent “niceness” is not going to be enough if they can’t provide a speedy resolution. Agents also need to be careful with the language they use; remembering that it’s not a writing competition – use plain language and keep it brief.
5. **Chat must be easy-to-access to be highly adopted** – this might be access from the self-service portal, buttons within emails, or via a desktop agent. Plus, it could be the extension of an existing support call (with or without the need for remote access).



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Chat success is more about people than it is technology.

Planning for day-to-day operations needs to consider the whole customer/end-user journey, not just the part that will eventually play. Thus:

1. **Don't view chat sessions in isolation** – an end user might have already tried self-service, say, with no success. Ensure that the chat agent knows what the customer has already tried, for instance the knowledge articles they've already accessed (which may or may not have been right for their issue). Failing to do this will potentially make it a poor, and time-consuming, experience; and one that loses a chat user forever.
2. **Make chat handling seamless** – with agreed processes for handing customers off between agents, plus for the collaboration between multiple agents and IT teams (and potentially departments). This is usually more complex than it sounds, as there's a need to know when to hand over, the right people to hand over too, and whether the right people are available.
3. **Benefit from chat-enhancement capabilities to improve the customer experience** – for instance, the agent being able to see the customer's text before they've finished typing (what they need to say). It means that the agent can prepare their response more quickly if workload allows, e.g. identifying and personalizing a concise canned response.
4. **Leverage existing telephone best practices** – for instance, agree on service level agreements (SLAs) and escalation paths including initial response times and the key timepoints for assessing chat progress. Or knowledge availability for chat-based agents – knowledge of people, IT assets, ticket history, plus all the usual scripts and knowledge base articles that have been refined for chat canned-text use.
5. **Build in suitable feedback loops and management mechanisms** – for instance, make post-chat surveys easy to complete. Also, when monitoring chat performance – whether it be by chat volumes, times, customer satisfaction, or using other metrics – ensure that the metrics drive the right behaviors. For example, not letting a focus on first contact resolution (FCR) override valuing the customer's time. Finally, have a formal process for turning chat-based resolutions into new knowledge articles.



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The chat capability needs to be a well-oiled machine.

DELIVERING A SUCCESSFUL CHAT INITIATIVE

While “failing to plan, is planning to fail,” it’s the effective execution of the plan that will make your chat initiative a success. Importantly, just dropping a new chat capability into “business as usual” operations, buoyed by the assumption that employees will use it because they use chat outside of work, will most likely fail to achieve the desired adoption levels.



A “build it and they will come” approach to new IT rarely works, chat included.

1. **Keep up the organizational change management** – organizational change management isn't a one-time thing. Instead it needs to be a well-planned-out, and executed, series of activities designed to elicit the right behavioral change and adoption of chat. Ultimately, employees will need to know the "What's in it for me?" before they will embrace it.
2. **Apply sufficient marketing effort** – while one could argue that this falls within organizational change management, it's importance is sufficient to have its own bullet. SDI research on the key factors that influence self-service success – a report called "Realizing ROI from Self-Service Technologies"⁶ – can be used as a mirror for chat. That while personal preferences and the technology can be barriers to success, a key part of achieving success is the use of marketing to promote and encourage self-service or, in this case, chat use.
3. **Ensure that chat is optimized from the get-go** – not only that agents are sufficiently trained and aware of how to work in the new chat environment, but also that the best use is made of them. For instance, use easy-to-use data-capture mechanisms to place the end user and their issue (or request) with the most appropriate agent whenever possible. It's intelligent routing that will get more intelligent with AI.
4. **Chat needs to be successfully offered across multiple delivery channels** – matching the ways in which end users will need, and want, to access it. For instance, they won't always be sitting at a desk and in front of a PC. Thus there's the need to understand how best to offer chat for mobile workers, say – assessing whether chat should be made available, in a mobile-friendly form, via the self-service portal or via a tailored mobile app.
5. **Leave hooks for future readiness** – for instance, and as covered in the next section, because chat technology is changing with the introduction of chatbots and voice-based chat via virtual personal assistants. Or the ability to cross mediums – say, starting on a PC, moving to phone while walking to the car, and using voice and a virtual personal assistant while driving (safely). But future readiness isn't just about the new technology, it's also about new use cases. For instance, as part of the use of ITSM thinking, best practices, and technology in other lines of business such as HR and facilities through something called "enterprise service management."



8 IT's investment in chat should be made knowing that the same capabilities will be replicated, and used, across other lines of business.

The Future of Chat

So far, this paper has covered human-to-human chat, and what's needed to make it successful. However, the rising growth in B2C chatbots that employ AI, or more specifically machine learning, offers up many new opportunities for IT support.

Customers, or potential customers, can ask chatbots questions related to product features, SLAs, or pricing, or to seek support; and the chatbot will either help through the provision of automated answers or pass the customer, and the information it has gathered, to a human (who can help). In many ways, chatbots are replacing self-service capabilities with something that's more intelligent, more personalized, and easier to use.



Think of chatbots as an evolution of both self-service and chat.

The use of such chatbots offers a number of benefits to IT support organizations:

- Additional, lower-cost “team members” who never sleep – thus providing 24x7 support
- End users receive the availability and immediacy of response they now expect (thanks to consumerization)
- IT support agents are unshackled from repeat issues to undertake more complex and interesting work.

In some ways, it might sound too good to be true – better service and lower costs. But, as with human-to-human chat, there are barriers to success; barriers that are compounded by the similarities of chatbots to self-service.

The aforementioned SDI research, into self-service success factors, states that only 12% of organizations have received the anticipated return on investment (ROI) from self-service. This paper has already offered advice that's relevant to avoiding such a fate with chat, with this also relevant to chatbot initiatives:

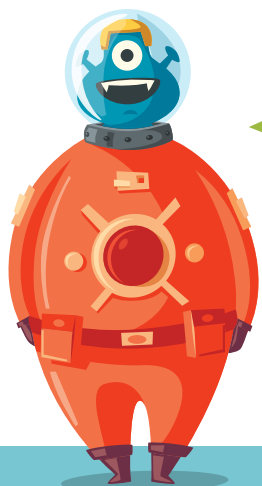
- Building the chatbot capability around the end user, not the technology
- Making chatbots easy to access and use
- Reimagining and leveraging existing IT support best practices
- Building in suitable feedback loops and management mechanisms
- Employing organizational change management techniques from the outset
- Applying suitable marketing effort.

But there's something else that's key to chatbot success – knowledge management.

As with people, chatbots are only as good as the knowledge they have access to. And thus, many organizations will need to revisit their knowledge management capabilities to ensure that what they have is fit-for-purpose across three key use cases:

1. Enabling service desk agents (including for chat)
2. End-user self-help via self-service capabilities
3. End-user self-help via chatbots.

Finally, as already alluded to, chat is no longer limited to text and the limitations that text places on its use. Virtual personal assistants, such as those employees might already be using in their personal lives, will become more prevalent in the workplace – eating into both self-service portal and text-based chat use. It's yet another thing to plan for as chat use grows, and how chat is used morphs into different access and communication channels for IT support.



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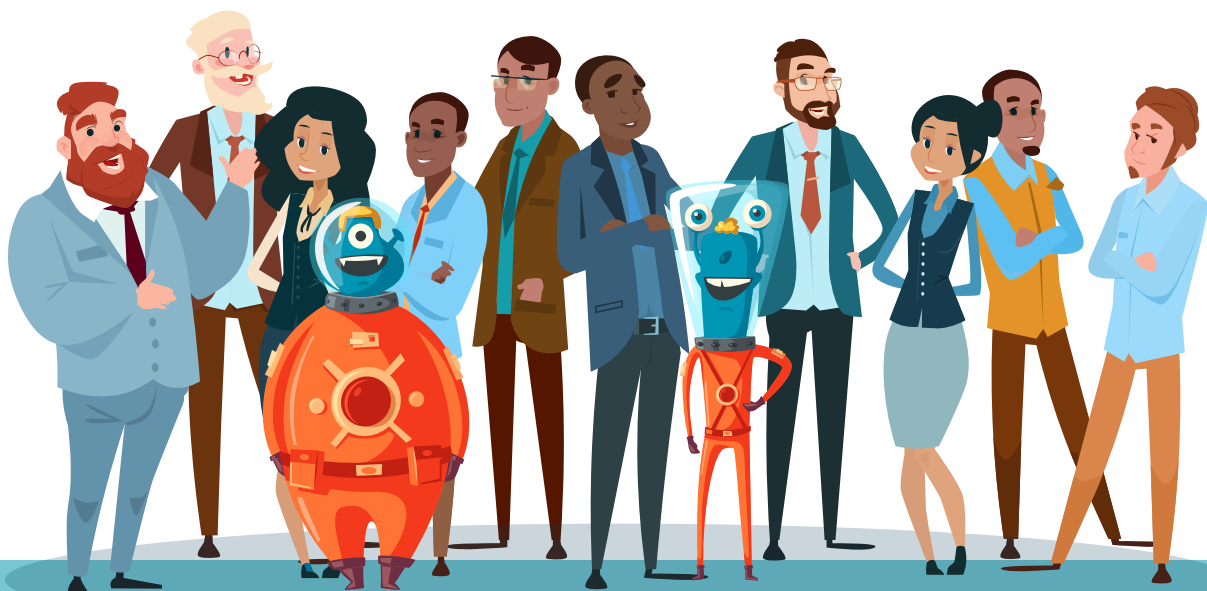
Chatbots will require a significant investment in getting knowledge management right.

Summary

Chat exploitation is a great opportunity for IT support organizations. Chat will also become an expectation of employees buoyed by their consumer-world experience of service and support.

To get chat right, both now and in the future, remember the following ten key things and the tips that support them:

1. Chat is currently an underutilized IT support channel
2. Consumerization is ultimately bringing employee personal-life experiences of service, support, and the overall customer experience into the workplace; raising expectations of the corporate IT organization including the offered access and communication channels
3. Chat use, in a B2C context, is growing rapidly
4. Modern consumers expect choice of channel; and chat offers the best end-user experience – in terms of happiness and speed of resolution – of all remote IT-support channels
5. Chat success is more about people than it is technology
6. The chat capability needs to be a well-oiled machine
7. A “build it and they will come” approach to new IT rarely works, chat included
8. IT’s investment in chat should be made knowing that the same capabilities will be replicated, and used, across other lines of business
9. Think of chatbots as an evolution of both self-service and chat
10. Chatbots will require a significant investment in getting knowledge management right.



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