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– Richard Clarke, Technology Director, Positive Solutions

Positive Solutions sees increase in productivity and customer satisfaction following the roll-out of WebEx remote support facilities



INDUSTRY

Financial Services

WEBEX APPLICATIONS

Support Center

SUMMARY

The company uses WebEx Support Center to provide remote support to 1400 IFA Partners in the field. WebEx allows the IT team to respond quickly and efficiently to resolve any technical issue via the internet without having to use the telephone. It has allowed the company to commit to a four hours resolution time, which means it now offers a better service to Partners without an increase in service delivery costs.

ABOUT POSITIVE SOLUTIONS

Line of Business

National IFA

Headquarters

Newcastle, UK

Number of Employees

50

WebEx Customer since 2004

Positive Solutions is the largest National IFA in the UK. The company makes use of internet enabled software to provide administrative and regulatory services, providing back office support to approaching 1400 Independent Financial Advisor and Independent Mortgage Broker Partners.

Positive Solutions has long been recognised as one of the leading IFAs in the country when it comes to the innovative use of technology and has won many industry awards. When a new Partner joins, they are given a tablet PC with Positive Solutions’ bespoke software package Intuitive. This software delivers straight-through processing for both the Partner and provider. Positive Solutions has also developed an extranet service, which holds all commission information needed by the Partner, an interactive pipeline system linking the Partner to the administration unit at the life office, as well as information on compliance and research.

The company was established in 1997 and was built from inception on a technology based offering, it is the only National IFA in the UK to use Tablet PC technology extensively throughout the business.

The Challenge

The challenge for Positive Solutions was to ensure optimum technical support to its Partners in the field through a team of five support staff. Positive Solutions was committed to keeping resolution times below four hours, but as the Partner base was growing rapidly, it was beginning to struggle in terms of man-power. Mark Henderson, Assistant Director, explains: “Our IFA Partners want a real-time solution. If they can’t use our software, they can’t make money, therefore it is imperative that we are able

to provide ‘real-time’ support, which is why we commit to a four hour Service Level Agreement.” Henderson acknowledges that since many Partners only have a limited knowledge of technology as their strength lies in dealing with clients face to face, it was a challenge to deliver on this promise.

It is the company’s policy to try to discourage Partners from using the phone to report technical issues. Instead, users were encouraged to email the technical support team with details of the complaint. Henderson explains, “We have found that telephone support is not an effective way to provide technical support. We wanted to avoid the frustration of talking Partners through problems, not just because of the difficulties of explaining technical problems, but also because it is not cost or time effective.” However, there was only so much that could be solved on email, which meant that if email failed, the entire laptop would have to be couriered back to Positive Solutions for the support team to diagnose and fix the problem. This was proving to be expensive on two levels. Not only was there the direct expense of the courier, but for the Partner, unable to work without a laptop, the opportunity and productivity cost was very high indeed. Henderson explains: “We provide a mission critical business application so we need to ensure minimum downtime. We wanted to keep costs as low as possible without compromising our ability to rapidly diagnose and resolve support problems, which is why we looked elsewhere.”

The Solution

The company initially trialled Virtual Network Computing (VNC) software, which allowed support workers to view and interact with another computer using the internet. However Henderson explains



that this lacked collaborative working features and had architectural limitations which made working outside the company firewall impossible.

The answer was to invest in WebEx Support Center, an online support solution that facilitates the remote diagnosis and support of technical problems. Taking advantage of WebEx's web communication application, it allows support workers to remotely access their Partners' computer regardless of the operating system and hardware they use. This can be done from any web browser, without having to buy or install hardware or software or having to reconfigure firewalls. The advantage of WebEx Support Center is that not only does it allow the support team to instantly view the Partner's desktop or applications, it also allows collaboration and decision making through features such as instant messaging and video. According to Richard Clarke, Technology Director, Positive Solutions, "WebEx gives us the ability to quickly deploy live 'real-time' support in a personal way. It's the closest thing to being there in person, without us actually having to travel."

Partners need to ensure all client information remains confidential, therefore it was paramount that that third parties could not access any information during the web meeting. WebEx's integrated security, which has a 128-bit SSL encryption for all meeting services, ensures maximum security, eliminating this problem.

Another differentiator was WebEx's scalability. WebEx is delivered via its own information switching network, the MediaTone Network, which is able to handle high-speed data, audio and video communications as well as managing complex media types. The fact that the MediaTone Network is able to support a range of new devices and platforms meant that it could easily be rolled out to the new tablet PCs, which was another advantage of WebEx over its competitors.

The Benefits

Because it is browser based, it was possible to immediately roll out WebEx Support Center to the entire support team. WebEx also has open APIs, which

means that Positive Solutions could seamlessly integrate WebEx's one-click meeting and scheduling capabilities into its existing extranet and help desk system. Henderson explains, "The WebEx solution is hosted via our extranet so for IFA Partners with a support problem, it couldn't be easier. All you have to do is go to the extranet and right-click on the one-click support button. This sends an email to our support staff, who can immediately join the conference and share whatever document or application the IFA Partner is working on. WebEx's ease of use has been beneficial on a number of levels. Clarke explains, "It's totally user-friendly, which is particularly important to us because some of our users are fairly technology shy. If they've never used it before, that's not a problem either. All they need to do is to download a simple plug-in, with set-up taking only a few minutes."

Another benefit is the ability to transfer files to and from the Partners' systems. Sometimes fixes, or patches are required to software on systems. Prior to the adoption of WebEx, if patching was required, a complex process would need to be followed to get the files down to the system, and then telephone support talking through installation of the patch. Now, the IT team can patch through updates and resolve problems via WebEx Support Center, whilst in control of the

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adviser machine directly. Clarke concludes, "Thanks to WebEx, we are able to respond quickly and efficiently to resolve any technical issue, which means that we have been able to offer a better service to our Partners without increasing cost of service delivery. I have no doubt that this has increased our customer satisfaction levels."

Positive Solutions is currently migrating its Partners from laptops to tablet PCs. One benefit of WebEx Support Center is that it has made the IT team more productive. Before WebEx, most of the team's time

was spent on support. With WebEx Support Center, their time has been freed up, which means that when the company began the migration to tablet PCs, instead of having to bring in new resources, it could deploy members of its existing IT team.

Positive Solutions is averaging 200 support instances per month. Out of these 200 cases, Clarke estimates that 25% would previously have involved a call back to base, incurring courier costs of approximately £20 each way. This gives it a base level return on investment of £2,000 per month. When taking into account the savings on developers' time of roughly one week per month, the total estimated monthly ROI is £4,500.

The Future

Because it provides advice to Partners, it is a regulatory requirement for Positive Solutions to have one-to-one meetings with its Partners to ensure they have sufficient industry knowledge. Henderson highlights the meeting functionality of WebEx as a cost effective solution: "We currently do a number of these meetings over the phone or face-to-face, but I don't see any reason why we couldn't do them on WebEx. The collaborative functions of WebEx add value to a telephone conference allowing us to have a low cost one-to-one meeting, without even having to leave our offices."

HIGHLIGHTS

- WebEx Support Center allows secure remote access to Positive Solutions Partners' Tablet PCs and laptops, which enables it to commit to a four hour support resolution time
- WebEx has increased productivity, which has freed up the IT support team's time. As a result, Positive Solutions has expanded IT services, without having to bring in new resources
- WebEx enables the IT support team to offer a better service to Partners without increasing cost of service delivery, which has increased customer satisfaction and retention