



First Command Financial Services

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Keith Tyler
IT Support Center Manager
www.firstcommand.com



First Command invests in GoToAssist Corporate for efficient remote support

First Command Financial Services and its subsidiaries, including First Command Bank and First Command Financial Planning, assist American families in their efforts to build wealth, reduce debt and pursue their lifetime financial goals and dreams—focusing on consumer behavior as the first and most powerful determinant of results. Through personalized financial plans that emphasize accumulating wealth while reducing risk, First Command financial advisors have established lasting relationships with hundreds of thousands of client families since 1958. The company, which is headquartered in Fort Worth, Texas, has approximately \$11.4 billion in managed assets and serves more than 289,000 client families. Financial planning products and services are offered through about 170 offices staffed by licensed financial advisors who are independent contractors but exclusively represent First Command.

The challenge: reducing the time, cost and frustration of phone-based support

First Command’s IT Support Center, headed by Manager Keith Tyler, is responsible for delivering technical support services to employees and licensed financial advisors and their staffs. The team provides first-, second- and third-level support ranging from making simple password changes to rebuilding an operating system, assisting with proprietary applications and querying backend databases. The team of 13 operates around the clock during the week and also offers limited hours on weekends.

“We previously used phone support only,” Tyler explained. “However, some of our users are not computer savvy, and many of them just don’t have the time to spend working on their computers. We tried to solve the problem of handling larger and more-complicated issues, such as rebuilding an OS, by sending out a CD and then getting on the phone with the individual. Overall, though, it was a slow and frustrating process for users and our team.” With phone-based support, call resolution often took an inordinate amount of time and frequently led to escalation of the issue, both of which added costs to the IT Support Center’s operations.

Key benefits

- Reduces call duration and boosts first call resolution to 90%
- Increases satisfaction of users and support staff
- Cuts costs through leaner staffing and increased productivity
- Enables full range of support services through powerful functionality

Another challenge was handling the diverse IT systems used by financial advisors. “We don’t dictate to our financial advisors what operating platform or brand of PC they must use,” said Tyler. “We do have minimum requirements to run our proprietary financial systems, but they can pick Dell or HP or whatever they want. This mix of environments added another layer of complexity to our support work.”

In an effort to move beyond straight phone support, Tyler and his team experimented with session shadowing using Citrix XenApp™, the virtualization platform on which they host and deliver key applications. However, session shadowing only allows support staff to remotely view applications – not operating systems or databases.

Implementing GoToAssist

On the recommendation of First Command’s director of network operations, Tyler turned to Citrix® GoToAssist® Corporate™ to provide Web-based support, including the ability to remotely view a user’s screen and, with permission, take control to perform troubleshooting and administration.

For First Command, one of the most valuable features of GoToAssist is the remote diagnostics tool, which enables support representatives to determine what operating platform is installed, including the service pack; what is running in the background, such as spyware; and which applications are bandwidth intensive.

GoToAssist also enables a support rep to consult with a team member in the background using the “invisible collaboration” feature or quickly transfer a session to another rep. These capabilities streamline the call resolution process.

Another important tool is the customer survey feature, which solicits feedback about the support experience following the GoToAssist session. “I download all surveys for the month into an Excel spreadsheet and send the comments – which are almost always positive – to my boss and the team as a morale booster,” Tyler said.

Saving time and money while boosting productivity

GoToAssist is contributing significant time and cost savings for the IT Support Center and First Command as a whole. “Time is money, and we are definitely saving time with remote support compared with phone support,” Tyler said. He gave several examples of cost savings. First, shorter support calls mean that employees and financial advisors take less time away from their core functions of winning, advising and servicing customers, thus raising productivity across the enterprise. The IT Support Center has consistently met its service level agreement numbers, including an abandonment rate of only 1 percent.

A new area of potential savings is the internal auditing function. “We have added six seats of GoToAssist to give our legal and compliance auditors a tool for remotely accessing financial advisors’ computers to audit client files,” Tyler said. “GoToAssist is expected to reduce travel significantly by providing an experience that’s just like sitting next to the advisor in their office. Auditors

also are finding that it's much faster to transfer large files with GoToAssist than using Outlook or a VPN. We anticipate saving thousands of dollars in travel expenses and lost productivity."

Equally important is the improved satisfaction of users and support reps alike. In addition to shortening call duration, GoToAssist has helped the support team raise first call resolution rates by about 5 percent, currently resolving 90 percent of issues during the first contact. "Because it's so much easier for our people to solve issues by looking at or controlling a screen compared to trying to direct the user over the phone, our staff can troubleshoot and fix problems very efficiently. Also, users are free to give control to the support rep and simply go about their business. However, many people like to watch the rep fix the issue so they learn how it's done for next time. GoToAssist is a great training tool." Many glowing survey responses attest to the satisfaction of users around the world.

"The core mission of our home office is to support all the people in the field who serve customers. GoToAssist plays a big role in that mission. Employees and advisors really like it, and it's made our job easier," Tyler concluded.



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