



### IRESS Limited

“How do you put a value on elite service? The real return on investment is that GoToAssist helps us meet the expectations of our clients.”

Mathew Alvaro  
Support Manager  
[www.iress.com.au](http://www.iress.com.au)



## IRESS earns competitive dividends with GoToAssist

When finances are involved, people trust only the best. That is why financial professionals throughout Australia choose technologies and services from IRESS Limited, a leading wealth management company. IRESS software, such as the popular VisiPlan financial planning product, have become an industry standard for Australian banks, professional advisors and large financial institutions. The company's focus on customer service has made it one of the fastest-growing companies in Australia.

### The challenge: increase competitive advantage through timely support resolution

IRESS works closely with financial professionals to ensure the company's software is running well. “My department's main focus is resolving problems and providing knowledge about our products,” said Mathew Alvaro, support manager for IRESS. The company prides itself on a customer-centred approach. “We want our clients to get the best value for their money. Our customer focus is one of our biggest assets in this industry.”

In spite of IRESS's best efforts, all too often support calls resulted in what Alvaro termed “tennis play,” with calls and files volleyed back and forth between the support team and the client. “We spent a lot of time trying to identify and replicate the issue, and calling the client back for more detail,” he explained. Frequently, the client needed to transfer the software database electronically or send it on a CD by courier to the support team. “The whole process could take several hours spread over a period of weeks.”

### Implementing GoToAssist to provide better client service

To provide better service, Alvaro wanted to limit the back-and-forth exchanges between clients and the support team. He first explored Web collaboration tools to provide remote support – without success. “We concluded they were too limited and not secure enough for our use. We then decided to evaluate GoToAssist,” he said. During the evaluation period, Alvaro and his technicians concluded Citrix® GoToAssist® was the right solution because it enabled them to resolve issues faster, more



completely and more securely. “GoToAssist was a lot smarter and gave us the ability to service our clients in a manner that no other competitor does.”

### Eliminate “tennis play” through remote assistance

The company’s six support offices now use GoToAssist to provide rapid, remote support during 50 percent of the company’s support calls – those that have been escalated due to degree of complexity. As a result, issues that used to take weeks to troubleshoot can now be resolved in a fraction of the time. “We can now resolve most issues within the day,” said Alvaro. “The bottom line is that GoToAssist helps us provide support services more efficiently.”

GoToAssist is particularly useful for resolving complex issues such as script errors or database problems. “We are able to dive into our client’s system, identify the problem rapidly and apply a fix. Before GoToAssist we had no way to analyse these issues,” said Alvaro. If needed, the support representative can use the file transfer feature to retrieve the client’s database, analyse it and apply it back to the system, eliminating the need for the client to transfer the database or copy it to a CD. “GoToAssist took out the whole tennis play between client and support. We can now resolve many more issues on the first call.”

#### Key benefits

- Resolves complex support issues in a fraction of the time
- Reduces support-related travel costs
- Cuts development time in half through session recording
- Increases competitive advantage through elite service

Remote support through GoToAssist also reduces the number of on-site trips IRESS technicians and programmers need to make, significantly reducing travel costs. Previously, the company would send a staff member to clients’ offices up to four times each month. Now the company reserves on-site visits for higher-value interaction with customers. “With GoToAssist we have been able to reduce our trips for support issues to virtually zero. Now when we visit clients, we are there to provide information about our services,” Alvaro explained.

### Cut development time in half through session recording

Through the GoToAssist session recording feature, remote-support sessions and other information are recorded for later playback. This gives IRESS programmers a new way of resolving technical issues and developing new features. “Through the recording feature, a programmer can see the error in the client’s working environment. That’s where GoToAssist really excels. We can halve the development time quite easily because we spend no time trying to replicate the issue,” said Alvaro.

### Give clients the confidence of strong security

According to Alvaro, “One of the main concerns in the financial services industry is privacy. We’re dealing with personal data for our client’s customers.” At first, clients were wary of remote support technology, but warmed up to it once they learned that GoToAssist is permission-based and provides powerful 128-bit AES encryption for database file transfers and screen-sharing data. “Our clients are now big advocates of the technology and they want us to use it often.”

## Maximize Return on Investment through elite service

The productivity gains from GoToAssist have enabled IRESS to provide better service for more clients without creating more support overhead. “Our company has grown exponentially over the last few years, and technology like GoToAssist helps us work more efficiently and avoid increasing support staffing,” Alvaro said.

Yet for IRESS, the return on investment for GoToAssist goes well beyond dollars saved. “How do you put a value on elite service?” Alvaro asked. “The real return on investment is that GoToAssist helps us meet the expectations of our clients.” That elite service was recognized recently when IRESS won an Australian Service Excellence Award for outstanding customer service. “The reason we won the award is that we’re always striving for new areas of excellence, and GoToAssist is a part of that.”



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