



CCH, a Wolters Kluwer business

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Allen Murdock
Director, CCH Software Support
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CCH achieves big returns from GoToAssist, especially during tax season

CCH is a business unit within Wolters Kluwer, a market-leading global information services company based in Alphen aan den Rijn, the Netherlands. CCH offers approximately 30 software solutions to accounting firms and the tax departments of corporations. The products can be licensed or delivered via the Software as a Service hosting model. The Software Support team, located in Wichita, Kansas, comprises about 200 full-time representatives, who are augmented by another 200 temporary workers during tax season.

The challenge: finding a faster and more efficient way to support customers

CCH solutions – and the tax and accounting processes they support – can be complex. Support calls often require evaluation of tax returns and other files to pinpoint issues. For this reason, a number of the representatives on the team are accountants as well as IT experts.

Allen Murdock, who directs the Software Support team, said, “Although we can deliver our software as a service, the majority of customers still install it locally. In the past, when an issue arose, the representative often needed to look at the file or tax return to solve the problem. This meant the customer had to zip the file and email it. Then the rep had to review it and schedule a time to discuss it on the phone. Finally, the corrected file had to be sent back to the customer. It was a time-consuming process.”

Murdock recognized that the existing system needed to be improved. “We needed a way to streamline the support process by reducing complexity. In particular, we wanted to increase first-call resolution rates. As a Lean Six Sigma organization, we’re focused on customer satisfaction, so an overall goal was providing a better support experience.”

Implementing GoToAssist for external support

Murdock evaluated several remote-support tools, including Citrix® GoToAssist®, using his “power users” – the reps who combine accounting and IT expertise – to test them. “We found that GoToAssist offered richer

functionality at a more competitive price than the other solutions.” Three key attributes made the Citrix Online tool the most attractive option. According to Murdock, “The first is security. The strong encryption integrated into GoToAssist gives us and our customers full confidence that sensitive financial information is protected. Next is ease of use: exceptional usability for our customers was critical. Finally, the solution provides the robust reporting capability we were looking for.”

The wisdom of this choice was reinforced when CCH learned that the vendor of its new VoIP phone system was also a GoToAssist customer. “When people you respect are using a product, it helps to validate your decision,” Murdock said.

Currently, CCH uses GoToAssist in about 20 percent of its support calls. Now that the tool has been rolled out to seasonal employees as well as full-time staff, the number of GoToAssist sessions per month is expected to top 15,000 during the peak season of December through April.

Key benefits

- Reduces call resolution time and escalations
- Satisfies customers and support reps with speed and ease of use
- Provides strong security and robust reporting capabilities
- Saves more than \$1 million annually

Improving support metrics across the board

Since implementing the Citrix Online solution in early 2008, Murdock has seen many measurable benefits, starting with higher first-call resolution rates, which have improved tremendously with GoToAssist. On average, about 80 percent of customers report that their issue was resolved on the first call. In cases where specialized input is needed, GoToAssist enables a more experienced rep to join the session on the fly so that a follow-up call isn’t required.

GoToAssist is also reducing the amount of time needed to resolve an issue. Viewing a customer’s screen in real time is far more efficient than the complex process of emailing files back and forth. Previously, a resolution using email took about three days; today, that same issue can be resolved, on average, in 28 minutes. “GoToAssist not only saves our clients valuable downtime waiting for a resolution, it also shortens our call times in order for our representatives to handle additional clients calls throughout the day,” said Murdock.

Combined, the savings from fewer escalations and shorter resolution times add up to more than \$1 million per year.

Customer satisfaction is another metric that has improved with GoToAssist. CCH receives favorable ratings from nearly 97 percent of customers, compared with only 79 percent before adoption of the solution. Customers are so happy with GoToAssist that they now expect it to be available. “When we rolled out GoToAssist to full-time reps, customers considered the tool a huge plus. Now, they view it as a negative if someone isn’t using GoToAssist, which is why we now provide it to our seasonal workers as well,” he explained.

Support reps are equally enthusiastic about GoToAssist. “It helps them look like heroes to customers and reduces their level of stress because they can resolve issues faster.”

CCH is able to quantify all these results due to the detailed reporting that is provided by the Citrix Online account manager. “We get excellent reports that lay out exactly how much more efficient we are and how satisfied our customers are,” said Murdock. “This makes it easy to show senior management the ROI from GoToAssist. Also, if a customer indicates a negative or neutral experience via the survey feature of the tool, Citrix Online lets us know right away so we can follow up.”

Expanding usage to other areas of the organization

Various call centers within the Wolters Kluwer organization participate in a monthly call to discuss challenges and plans. Murdock brought up GoToAssist at one of these meetings, and other groups started using the tool. “They start small and then see the huge benefit of GoToAssist and add more and more users.” Currently, several Wolters Kluwer divisions have adopted GoToAssist.

Murdock noted, “Even in today’s economy, when we’re scrutinizing every expenditure, we’re expanding the implementation of GoToAssist. That should give you an indication of this solution’s tremendous value to our business.”



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About Citrix Online

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