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IT Global Support
Challenges, Risks, and Critical Success Factors

A Whitepaper on Understanding the Complex Dynamics of Success in a Global Support Organization.

Globalization is upon us. No longer do companies support customers in one city, state, or country. In the global economy, services are provided across country boundaries and the complexity of delivery and support increases substantially. Combined with a need for agility, organizations face the challenge of supporting a rapid pace of change where time to market is critical to maintain competitiveness.

Customer's expectations continue to grow while support organizations struggle to manage a multi-national support structure, processes, and policies while navigating different policies, cultures, and time zones. Customers are demanding near-perfection delivery where purchase to support is seamless. The expectation is that the support organization has visibility into all interactions and can proactively provide support via multiple channels.

In this time of knowledge-intensive products and services, organizations need to place an even greater importance on innovative strategies for delivery and support. The organization needs to focus on capturing the knowledge required to make data-driven decisions across the complete customer experience.

If your organization is going global as a new strategic initiative or consolidating multiple locations into one global support organization – this whitepaper discusses the challenges, risks, and critical success factors for building a sustainable global support solution.

Challenges of Global Support

For the global support organization, many of the typical challenges of a support organization are magnified as the organization faces support in a highly distributed environment. No longer is support a singular process managed in one location. Support staff, customers, end users, and subject matter experts live in different locations, use different tools, and may even speak different languages.

Challenges of Global Support

Challenges Overview

 Collaboration Between Different IT Departments

 Complexity of Infrastructure

 Cost Management

 Increases in User Demand

 Support Structure

 Multi-language Support

 Global Service Level Management

Collaboration Between Different IT Departments

Global support often requires a 24x7 operation using a follow-the-sun support model. A needed support specialist however may only be located in one geographical region. A significant challenge to building a successful global support model is developing collaboration between IT departments located in different geographical regions. Working as a virtual team, issues identified by one region need to seamlessly transfer the issue to the next shift no matter what the time zone. While a centralized ticketing system can help the organization to track open issues it does not ensure that there are established working practices between the teams.

Each geographical region is likely to have IT specialists to maintain and support the regional infrastructure. However, centralized services provided by the company span across geographical regions. If an issue is isolated to a geographical region it is likely to be solved by the local staff. But when an issue is identified that is not isolated to the geographical region then coordination must occur between the technical staff across the global enterprise.

Working in a collaborative model is an important challenge that must be addressed to be successful. Clearly defining roles and responsibilities across geographical boundaries can help to clarify how to manage customer exceptions with fewer delays. A centralized tool for logging and managing issues is also critical. But an emphasis needs to be placed on developing cross regional teams that can successfully manage exceptions and capture and share knowledge across regions.

Complexity of Infrastructure

In a global organization, geographic regions often have implemented different services, tools, and infrastructure. While a global organization desires a similar architecture across locations, in many cases it is impossible or difficult to standardize systems. Import and export restrictions may mean that some technologies are not even allowed to be exported to certain countries. Even if the company is able to standardize on infrastructure within company facilities, the company still must rely on the available infrastructure within each country where an office is located.

The complexity of infrastructure is only more difficult if the global company expands through mergers and acquisitions. When the parent company purchases another company, the global organization must integrate the new end users and services into the support model. The merger includes supporting new desktop systems that may or may not conform to company standards, and new applications and services that support staff have no previous experience in supporting.

The development and rollout of new services is also a highly complicated process. Applications may be developed in one geographical location, tested in another, and installed onto infrastructure in a completely different location. Implementation to the desktop across multiple geographical locations is also very complicated. If the organization does a phased rollout, then the support organization must provide support for both versions in the live environment. All of these challenges in the management of the infrastructure have the potential to increase demands on support resources.

Cost Management

When an organization decides to move to a global support model, the restructuring is usually seeking cost reductions and simplification in comparison to having multiple support organization working independently across the globe. In many cases, when a global organization is established the costs appear to be much higher than previously. Unfortunately, support organizations typically do not have robust cost models in place today to get a complete picture of the operating budget. Many costs are hidden and therefore are not accounted for in the benchmark prior to developing a global model.

When a global model is established with a singular process and using one tool to manage all customer interactions – costs become more visible or transparent. When operational costs are added to the cost of establishing a global model, the organization is often left with disappointing results and a perceived higher cost to serve. Overtime as economies of scale are established, cost savings are more likely to be realized.

Cost management is a real potential in the long term as the global organization uses the consolidated information about customers to make improvements to products and services. The information gained from the complete customer experience can provide insights not only into how customers are using products and services, but also provides better insight into root cause removal. Better products and services can lead to significant cost savings as customers require less support.

Increases in User Demand

End users are using more products and services and are often bringing personal devices into the work environment. The increase in devices also means an increase in demand for support services. Users want to connect personal devices to the network and often require support for apps downloaded from non-company sites. The IT support teams struggle with the balance between providing support to enable productivity of end users and while also refusing to support products that are not on an approved list. Additionally, end users expect resources be available when end users require support which means building a support organization that provides services 24x7x365 days a year.

Support organizations try to bridge the gap by providing additional channels and self-service to help manage the increasing demands without adding additional capacity to support teams. The efforts to provide support via self-service do not always translate into immediate results. End users experience difficulties in finding answers to their issues. Marketing initiatives are required to ensure end users are aware of and adopt available alternative means for support.

As the global organizations strive to be more agile and develop new products and services, rapid development cycles produce additional customer issues that require support. Subject matter experts focus on project work and have limited amount of time to conduct trend analysis and eliminate issues from occurring. Troubleshooting problems to identify the root cause is also often more difficult across a global organization with complex and varied infrastructure. All of this leads to additional need for resources from the support organization.

Support Structure

The global support organization structure is also an area that can cause significant challenges. Technical resources are typically required in each geographical location to provide services that require physical maintenance and support. A single point of contact is also required to provide end users with easy access to support via multiple support channels. A virtual model is one model for global support that uses technology to connect resources located in different geographical locations to allow them to work as one organization in a follow-the-sun method. As end users need support, their issues are routed to available technicians across the global organization.

The virtual model may seem like an ideal approach for centralized services using a distributed workforce. However, management of the virtual team across different regional boundaries, cultures, languages, and time zones presents its own challenges. Process consistency, clear responsibility and accountability, mentoring, and reporting are all more difficult when staff and management are dispersed across geographical boundaries.

An alternative approach is to build a support organization in a specific location to handle all inquiries 24x7x365. The support organization is located in a region where infrastructure and staff costs are less expensive. While the support model may be easier to manage, the challenge of supporting customers globally is higher. Differences in time zones, cultures, processes, escalation paths, and policies all contribute to difficulties in the delivery of support services from a single location.

Multi-language Support

Typically, a global organization will develop a policy on the use of multiple languages. While English may be established as the official language across the company, the support organization often requires support in additional languages. In some geographical locations, English may not be compulsory in the local school systems and employees may not have had the opportunity to learn the language at the level to discuss problems and issues with support staff adequately. These challenges often lead to the support organization providing support in multiple languages.

When a global organization provides support in multiple languages this complicates the process of disseminating knowledge and training materials. Translation is required in all supported languages and increases the time and cost from development to deployment. In addition, managing documentation in multiple languages is also difficult. As changes are made to training materials and documentation in one language, the changes must also be applied to all translated versions or the organization risks inaccuracies and potentially support errors.

Auto-translation services are available for the organization to utilize in real-time as needed in many different languages. Up to now, the translation services have been less that reliable. However, over time the translations have become more accurate and may serve as an alternative way to management the complexity of multiple support languages.

Global Service Level Management

The implementation of service level management on a global scale has significant challenges. For example, a ticket is opened in one geographical region but escalated to another region to the appropriate subject matter expert to resolve. The service level "timer" begins when the issue is identified and the record created. However, if the subject matter expert does not work in the same time zone as where the issue originated, it may exceed the service level before the subject matter expert even gets a chance to evaluate the ticket and take action. The customer is told it will be resolved in one business day – but is the customer's business day the same as the subject matter experts?

Using a single ticketing system will help to standardize on service level targets globally, however operational agreements across teams and regional boundaries will ensure that the teams are working together to make sure targets are met. Careful attention is required to breakdown each step in the incident management handling to ensure that all potential delays are identified and appropriate steps are taken to ensure that the delays are managed effectively. Only after the organization establishes realistic timeframes on how issues can be managed on a global scale should any attempts be made in establishing customer expectations.

Ultimately, support must be managed from the customer's perspective. If the expectation is set with the customer that an issue is resolved within a specific timeframe – the global organization must work across boundaries to ensure that the support is provided within the established timeframe.

Risks of Global Support

When building a global support organization, there are certain risks that also need to be considered. Whether it is determining the best support model to serve the diversity of customers or the integration of technology to support the process, the global support organization must navigate the risks of providing support on a global scale.

Risks Overview

♦ Focus on Perfection

⇄ Trust Across Borders

🔒 Data Protection

🗄 Multiple Sources of Knowledge

⑂ Underestimating Complexity

Focus on Perfection

All too often, an organization seeks to design the perfect support organization taking into account all possible scenarios. A focus on perfection often leads to a design that is over-engineered and not flexible enough to support the changing needs of the organization and its customers.

An example is using service level management timers to proactively notify staff of pending SLA breaches. In an effort to ensure that customer facing issues are dealt with in a timely manner, the organization turns on all service management notifications. While the ITSM tool has the capability of turning on a significant number of alarms, the organization should instead only turn on the alarms that are needed. In the end, the SLM alarms are so frequent that staff lose sight of what is important in the sea of notifications that are produced.

In the design of a global organization, less is often more. Start with simple processes, basic design of supporting technology and develop additional capabilities as business needs demand change. Don't over-complicate the support model with the belief that global complexity demands a complex delivery model. Better to start simple with established practices to improve over time, rather than spending too much time and effort over-engineering the support organization and needing to backout of decisions that are proven to be ineffective. Unfortunately, organizations are much too dynamic. The support organization must focus on a continuous improvement model.

Trust Across Borders

In a global organization, establishing trust between teams across geographical borders is important for overall success. Management often faces making decisions for one team's success which may impact other teams in negative ways. For example, building a categorization scheme for incidents in the ITSM tool is difficult across multiple geographical regions with different products and services. A categorization scheme that works for one team may not work for another. Management will find it is difficult to create one scheme that will make everyone happy.

If management wants to establish trust across borders, it is important to be open to feedback and incorporate the feedback into the long-term strategy whenever possible. While not every decision can please the team, it is important to remember that the entire support structure is important in serving customers. Management must seek for input across geographical boundaries and design solutions that work globally not just in one location. All too often, decisions are made that are impractical in other countries with different cultures.

Trust among team members is also critical for end-to-end service delivery. Team members need to trust that when an issue is escalated to another team member that service will be provided in a timely manner. Without trust among team members, knowledge transfer is impacted. Team members spend more time trying to figure out who is at fault during a failure instead of focusing on how they can work together to resolve the issue.

Data Protection

The volume of data that is collected about customers is increasing exponentially. With the cost of storage decreasing, internet use dramatically increasing, and ease of accessibility of virtual servers, datasets are growing with little concern for managing the archival or disposal of data. On a global scale, data management is an ever-increasing problem as organizations struggle to support the security of data across so many devices, transactions, and storage options. As a result, security breaches have become common place.

In a global organization, storage of customer data brings significant risk. Different countries have harsher penalties on the inappropriate storage and usage of customer data. Security policies are only effective if there are appropriate controls in the support environment to ensure policy adherence. As an organization progresses toward the global scale, data storage and maintenance will become increasingly more important. Transactions will need to be secure – ensuring that both the customer and support organization are trusted during the exchange of information.

Phishing is one of the most prevalent attacks on organizations and individuals. Support organizations need to establish robust processes and procedures for handling security attacks on a global scale. Nothing can damage a corporation's reputation faster than inappropriate data management and usage practices, or data breaches. The support organization is at the center of interactions with customers and deals with sensitive data daily. As such, data security needs to be a priority.

Multiple Sources of Knowledge

Support organizations that exist in one location have difficulties with multiple sources of data and information. In many cases, the information stored is no longer relevant, not well managed, or conflicting leaving support resources to search multiple places to find an appropriate solution for the customer. The problem of multiple sources of information grows exponentially for the global organization.

Sources of information include document repositories, record systems, wikis, content management systems, and knowledge bases. A risk that global organizations face is cleaning up existing information sources to leverage knowledge on a global scale. Essentially the efforts to weed out non-relevant data are costly but yield limited benefits. Then the global organization faces the task of creating the definitive source of knowledge essentially moving all knowledge to one location for use across geographical locations.

The efforts to manage knowledge on a global scale often do not meet the needs of the support organization and are resource-intensive activities. The hard work to create a singular repository only results in the same problem, unreliability of information and lack of use in the support processes. Additionally, the complexity and diversity of the infrastructure makes it difficult to manage knowledge effectively across geographical regions – not all knowledge should be seen or used across all geographical regions.

Underestimating Complexity

The scale of complexity of global versus regional support is not to be underestimated. The possibility of process delays and exceptions increases as teams are dispersed across the country borders and different time zones. Additionally, global support organizations often rely on different support partners across the globe as part of overall service delivery. Each partnership must be managed to ensure effective delivery of services to customers.

To ensure that services are delivered with consistency, the support organization must identify all critical partnerships, dependencies, and systems utilized in the complete value chain. Overtime, the complexity of service delivery can be more effectively managed as the organization reduces complexity and moves toward a more streamlined approach. Efforts such as standardizing on a service catalog across all geographical regions can substantially reduce the risk of global support models. Identifying preferred vendors and reducing redundancies in partnerships can not only save the organization money but it will also simplify the delivery model.

Additionally, if the organization can identify a successful model for managing IT changes – this will have a dramatic impact on reducing the needs for support across the global enterprise. Successfully managed change means identifying and eliminating risk as the organization seeks out improving or introducing new services into the corporate environment. By simplifying the service portfolio and managing changes, the organization can reduce complexity and better manage the overall value chain.

Critical Success Factors

Customers work with more than one service provider and their expectations are based upon those service providers that have the most seamless delivery model. To ensure global success, the IT support organization should adopt appropriate best practices that provide the infrastructure to deliver a quality customer experience – an experience that puts the customer first and reduces the friction of doing business on a global scale.

Critical Success Factors

Critical Success Factors Overview

Invest in Training and Skill Development

Establish a Global KM Framework

Build a Useable Customer Portal

Invest in Communication & Collaboration

Implement a Unified Support Channel

Invest in Training and Skill Development

The complexity of the global organization's infrastructure and services requires that staff are trained with the necessary skills to provide support on a global scale. As a new employee enters the IT support organization, training must cover not only the broad set of products and services, but also customers, locations, and the internal workings of the company. The support staff must also learn how to use the company's communication, ITSM, telephony, self-service, and reporting tools.

As a new product or service is released into the global environment, support staff require training on the functionality, the customers served, and the possible support requirements (incidents, requests, FAQs, etc.). Face-to-face training is expensive on a global scale. Alternative methods must be developed including the use of online training, webinars, and virtual meetings. The support organization must ensure that all resources are adequately trained prior to the service going live.

Once a new product or service is live, the IT support organization must ensure that knowledge about the service is transferred from the subject matter experts to support staff. During the initial stages of adoption, the organization will learn how to support the product or service. The support knowledge must be captured and distributed globally to ensure consistency in support across all geographical regions.

Critical Success Factors

Establish a Global KM Framework

The organization must develop and implement a knowledge management framework to ensure that valuable institutional knowledge is captured and used within the global IT support organization. The organization must develop practices for capturing knowledge real time within the support process but also make the knowledge available to the global organization as quickly as possible. IT support organizations with strong collaborative cultures will thrive as knowledge is both trusted and freely shared across geographical borders.

A global support organization that places knowledge at its core is also able to make informed decisions on how to better serve its customers. Knowledge is used to identify improvements to products and services, as well as processes, policies, and procedures.

In addition to focusing on knowledge captured while supporting customers, a strong knowledge management framework will also connect people to static documentation stored in document management systems as well as more dynamic knowledge in discussion boards and chat. The knowledge gained about customers and services will help drive innovation where new services are introduced that improve customer productivity and add new capabilities that empower customer success.

Build a Useable Customer Portal

In a global economy, customers want to work with service providers using their preferred channel, preferred language at any time of the day or night. While some customers prefer to call and speak to support staff, others prefer to support themselves through self-service. A well-designed customer portal must be developed with a simple interface built with the customer's needs in mind.

Gone are the days where the interface is written in IT terms and the screen is covered in information making it difficult for customers to use. Instead, the interface is clean; presenting only a search box at the top of the page and easily navigated relevant information at the bottom of the screen.

Additionally, an important component of successful self-service is customer access to a quality knowledge base. As knowledge is used within the support organization and becomes trusted, it is made available directly to customers through self-service. Timely publishing of knowledge to customers not only ensures adoption of alternative channels of support but can also dramatically reduce call volumes and free up support staff to focus on improving products and services.

Invest in Communication & Collaboration

Communication is the key to global success. The IT support organization must establish both formal and informal channels for communication, not just leave it to chance. First, plan regular communication with the distributed support team and make communication a regular habit. Too often, organizations rely on informal communication and assume that strategy and plans are adequately understood by all. This is rarely the case. By focusing on communication, both informal and formal, the organization will begin relying on regular and consistent information.

The global support organization should make an investment in a virtual meeting platform that provides both voice and video. Even in a distributed environment, face-to-face communication is necessary to build camaraderie and teamwork. Develop an agenda for meetings that allows for communication of progress toward goals and objectives and general information, but also allows for people to just connect and share at a personal level.

In addition to establishing formal communication, support management must also provide a vehicle for team members to collaborate with each other. Chat technologies provide a way for the team to stay connected both to answer general questions but also to help with resolutions during an interaction with a customer. Discussion forums provide an additional channel for sharing knowledge and working as a team toward solving more complex issues.

Implement a Unified Support Channel

In today's economy, customers are demanding valuable services at a reasonable cost that also reduce friction in performing their work. A customer expects that the support organization can switch easily between email, chat, self-service, or phone interactions. While customer expectations are realistic, it is important to develop a support organization that works as a singular entity even if it is spread across multiple geographical regions.

The global implementation of an ITSM tool provides significant gains in helping to track interactions across regional boundaries. It is important to implement one tool that meets the needs of each geographical region as closely as possible. The process for handling issues also must be standardized globally. A customer desires consistency in how issues will be resolved even if the organization has different operational procedures, activities, or tasks based upon regional differences in structure, policies, and culture.

From the customer's perspective, doing business with a support organization is a one-stop shop for all issues related to the products or services provided. The customer's expectations are that sending an email or calling on the phone is all seen as a unified interaction and that all interactions are tracked in a singular system and available to anyone assisting the customer. To accomplish a unified view of the customer experience requires the support organization to have unified processes, tools, and information that spans across geographical regions and support channels.

ComAround is a multinational leader that specializes in Knowledge Management and Self-service. We help organizations to achieve exceptional support by using intelligent knowledge as part of their digital transformation strategy, and by utilizing our expertise in Knowledge Management. ComArounds customers solve problems faster, handles easier increased volumes of issues in multiple languages, lower organizational costs and deliver excellent customer experience.

ComAround Knowledge™ is a powerful AI and cloud-based Knowledge Management Software (KMS) specifically designed to optimize the support flow by sharing accurate knowledge at the right time. The KMS aligns with the methodology Knowledge-Centered Service (KCS®) and is KCS V6 Verified. ComAround Knowledge™ is built on the latest Microsoft Azure technology. It integrates to Service Management platforms and feeds the chatbots and Virtual Support Assistants for more efficient support throughout the entire support flow. ComAround Knowledge™ is used by hundreds of companies worldwide, like Disney, Volvo Cars, and March & McLennan.

ComArounds Knowledge Management and KCS (Knowledge-Centered Service®) certified experts provide training and certification, as well as consulting services on how to improve business processes and adapt to cultural changes due to the digital transformation using intelligent knowledge. The knowledge experts often speak at international industry conferences and events. Per Strand, co-founder of ComAround, is a co-author of the internationally recognized book Self-service & Knowledge Success.

Our mission is to empower every person in the world to achieve more with support from intelligent knowledge.

About the Author

Julie L. Mohr is a dynamic, engaging change agent who brings authenticity, integrity, and passion to practitioners worldwide. Through her books, articles, speaking, consulting, and teaching — her purpose is to spark change in the world with thought-provoking dialog and interaction. Julie has a B.S. degree in computer science from The Ohio State University, a MaED from the University of Phoenix, and is currently pursuing her Ph.D. in Management and Organizational Leadership in Information Systems & Technology from the University of Phoenix. Julie is a certified ITIL Expert and a Certified Governance IT Professional. Julie captivates audiences at conferences worldwide on topics of authentic leadership, business strategy, artificial intelligence, the disruption economy, knowledge management, organizational culture, and innovation.